Quick Start

AXIOM QX
app.axiomqx.com

Two pages. Page 1: start your trial, add your people, build the Gantt. Page 2: Project Control, the portals, every day, and when things change. November 2026.

The schedule lives in your Smartsheet. AXIOM gives the homeowner, subs, suppliers and super their own view of it; the money, papers and notices you run from Project Control in AXIOM. **Have ready:** your Smartsheet sign-in, a card, a real job with its agreement, your subs and suppliers with emails, your super.

1. START YOUR TRIAL (ABOUT 10 MINUTES)

1. **axiomqx.com → Start your 30-day trial.** Name, company, email, phone, then the card on a Stripe page. $0 today. An invitation code means no card.
2. Welcome email arrives. Open the link, finish the sign-up. **app.axiomqx.com** from then on.
3. The welcome panel: **Connect your Smartsheet → Allow.**
4. **Build your template** (or Settings → Build my template). 30 seconds. A sheet opens in Grid the first time; switch to Gantt once, Smartsheet remembers.
5. **Subs & Vendors → Add a sub or vendor.** Company, Sub or Vendor, people with name and email. Save puts them on every job's Assigned To list.
6. **New Project.** Job name, client name/phone/email, address, town, block, lot, permit. **Build Project.**
7. **Day 31:** $399 a month, unlimited users and jobs. **Settings → Billing → Manage billing** for invoices, card, cancel.

The job is on Home and in Smartsheet (workspace AXIOM QX, a folder with the job name): the **schedule sheet** is the Gantt; the **client data sheet** AXIOM writes from Project Control.

2. BUILD THE GANTT (30 MINUTES TO A MORNING, BY JOB SIZE)

Open the schedule sheet. Go in this order, one column at a time:

1. **Lines.** The template is a baseline. Delete what you don't do, add what you do, in your order. Never add, remove or rename a column. Leave the locked first row.
2. **Assigned To.** Pick from the list; the list is your Subs & Vendors. Someone missing? Add them there, not here.
3. **Duration.** Working days per task (3d). Sections add themselves up.
4. **Start Date.** On the first task only.
5. **Predecessors.** Row number of the task that comes before (14). Comma for more than one. Every other date fills in by itself.
6. **Show Schedule.** Check the lines the client should see, usually the section rows. 10 to 20.
7. **Selection Required.** Check anything the client picks.
8. **Finalize By.** The decision date: start date minus lead time. Attach specs to the row.
9. **Supplied By Owner.** Check if the client buys it. **Stage**: leave it; the super and the supplier fill it.

3. PROJECT CONTROL (15 MINUTES TO AN HOUR, BY JOB SIZE)

Home → the job → Project Control. Edit or Add on each card; AXIOM writes the data sheet, the client sees it.

1. **Client and Property.** Filled from New Project. Edit if something changes.
2. **Payment Schedule.** From the agreement: each draw, description, amount. Tap the status on the row: **Not due → Billed** when you invoice it → **Paid** when the check clears.
3. **Change Orders.** Add: description, amount, date, file. **Pending**; the client authorizes from the portal; **Signed off** when you have the paper; **Billed**; **Paid**. Only Billed is due now.
4. **Credits.** Description, amount, date. **Credited** when applied.
5. **Notices.** Write it, tick "homeowner sees it". The client sees it, dated.
6. **Documents.** Add document: name and file, up to 30 MB. Client gets an email and a NEW badge until opened.
7. **Client uploads.** Files the client sends from the portal. You get an email and a count on the bell.

4. TURN ON THE PORTALS (ABOUT 5 MINUTES)

1. **Project Control → Client Portal card → LIVE.** Link and PIN are emailed to the client. Switch on **Weekly Report**, **Alerts** and **Uploads**.
2. **Subs & Vendors → LIVE** on each sub and supplier. One link covers every job you give them.
3. **Settings → Supers.** Name, email, phone. AXIOM makes his PIN and emails him the tracker link.
4. **Settings → Team:** office staff, email and role. Admin does what you do except Smartsheet and billing; Viewer looks only.

5. EVERY DAY

The Gantt is the truth. Subs run long, things go faster, weather stops you. You move the Gantt, and everyone's view moves with it.

Dates move	Change the duration, or the start date, in the Gantt. The chain recalculates. Client, subs, suppliers and the Monday email all follow.
This week	**This Week** in the menu: every task and delivery, all jobs, with the weather. Next week one tap.
Client picked	Row's Stage circle to three-quarter (the portal says Selection Made), or the supplier presses Mark ordered. Reminders run until the Stage is full.
Material arrived	Stage to full, or the supplier presses Mark on site. Reminders stop.
Invoiced a draw	Project Control, Payment Schedule: tap the status, Billed. Paid when paid.
Change order	Project Control, Change Orders: Add. Client authorizes on the portal.
Tell the client something	Project Control, Notices: write it, tick the box.
New document	Project Control, Documents: Add document. Client gets an email.
Something came in	The bell on Home: uploads, change order answers, overdue selections, newest first.

6. WHEN THINGS CHANGE

New sub mid-job	Subs & Vendors → Add a sub or vendor, LIVE. Pick him on his lines.
Sub gone	Subs & Vendors → Edit → Delete this sub, type DELETE.
Client lost the PIN	Project Control → Regenerate. New PIN emailed, old one dead.
New super	Settings → Supers: remove the old, add the new. AXIOM emails his PIN.
Client wants fewer emails	Project Control: switch off Alerts or Weekly Report. Portal stays on.
Payment schedule changed	Project Control, Payment Schedule: Edit or Add a payment. Total updates.
A date went red	A predecessor points at a row that moved or was deleted. Fix the row number.
Smartsheet not connected	Settings → Smartsheet connection → Reconnect.
Something off	Health in the menu says what. Support: New ticket.
Job finished	Archive it from Project Control. The sheets stay in your Smartsheet.
Next job	New Project. Same five minutes.

REMEMBER

1. The schedule lives in Smartsheet. Everything else about the job, Project Control.
2. The Gantt is the truth. Update it daily.
3. People go in Subs & Vendors, never typed into Smartsheet.
4. Finalize By = install Start Date minus lead time.
5. Show Schedule on sections, not every line. The client never sees the Gantt.
6. Rows are yours to change. Columns are not.

WHAT EACH PERSON SEES

Homeowner	Link + PIN, no account. Schedule milestones, selections with due dates and specs, payments (paid / billed / not due), documents with NEW badges, change orders to authorize, credits, notices. Reminder emails 7 and 3 days before a selection is due, then when it is late. Monday schedule email.
Sub	Every task assigned to him across your jobs, with dates, stage and the weather. Nothing to press.
Supplier	His lines across your jobs. Marks **Ordered** and **On site**. Nothing else.
Super	Tracker on his phone, the PIN AXIOM emailed him. Sets stage: Not Started → Start Process → In Motion → Working → Complete. Every tap is stamped. Dates stay in the Gantt.
You	Home: every job, one line each, the four money tiles, the bell. This Week: all jobs by day. Project Control: the job. Health: every job green or red.