

CLICK

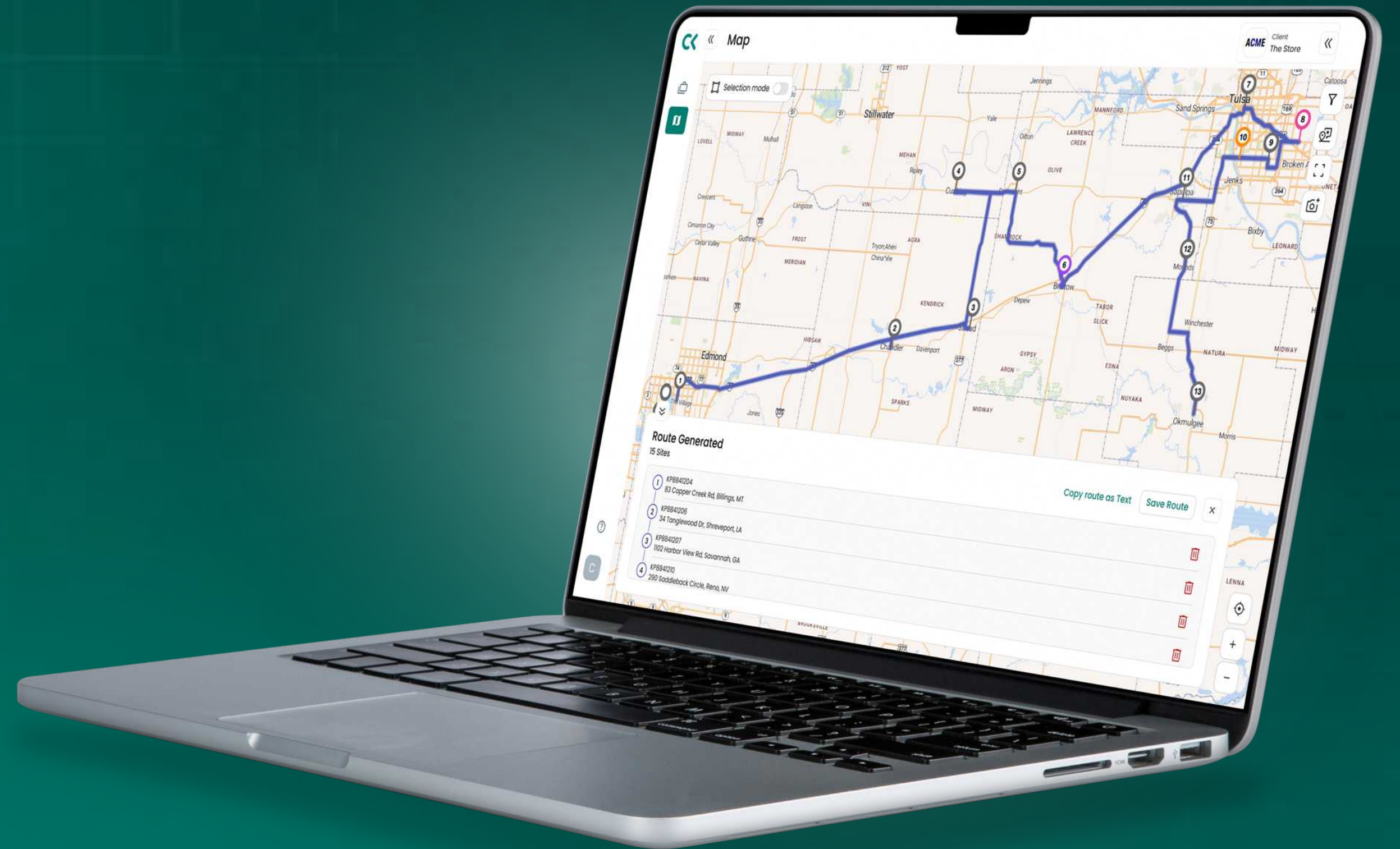
PROJECTS  
PEOPLE  
PROGRESS  
TOGETHER

USER MANUAL

# ClickPM User Guide

PART 1 — INTRODUCTION TO CLICKPM

Built for multi-site project management.  
Backed by real results.



Projects • Tickets • Contractors • Locations • Routing • Progress

[clickpm.io](https://clickpm.io)

# Welcome to ClickPM

A clearer way to coordinate complex, multi-location work.

OVERVIEW

ClickPM is a project management platform designed to make complex, multi-location projects easier to manage, coordinate, and complete.

When projects involve multiple locations, contractors, tasks, deadlines, documents, and stakeholders, keeping everyone organized can quickly become difficult. Information may be spread across emails, spreadsheets, text messages, shared folders, and different systems. Project managers can spend a significant amount of their time simply trying to determine what has been completed, what still needs attention, and who is responsible for the next action.

ONE PLATFORM

- Projects
- Tickets
- Assignments
- Updates
- Performance

**ClickPM brings this information together into one centralized platform.**

The system provides project managers, internal teams, contractors, and other authorized users with a common place to view projects, manage tickets, assign work, track progress, review updates, and monitor overall project performance.

THE OBJECTIVE IS SIMPLE

Make project information easier to find, work easier to coordinate, and project progress easier to understand.

# What ClickPM Does

Day-to-day project execution, organized from one central location.

CAPABILITIES

Depending on the user’s role and permissions, ClickPM can be used to:

- 01

Manage projects from start to finish.
- 02

Track work progress in real time.
- 03

Visualize operations on interactive maps.
- 04

Optimize field team routes.
- 05

Assign and dispatch work efficiently.
- 06

Monitor team performance and workload.
- 07

Update and manage tickets in bulk.
- 08

Track tasks and team activities.
- 09

Automate cross-project access.
- 10

Manage billing and invoicing.
- 11

Generate reports and export data.

Rather than relying on several disconnected methods to manage a project, ClickPM provides a structured environment where the information associated with the project can remain connected to the work itself.

Built for scale

For dozens, hundreds, or even thousands of locations or tickets, ClickPM keeps the overall project visible without losing individual details.

## One Place. Real-Time Visibility.

Replace fragmented tracking with a live view of the work.

### CENTRALIZATION

Without a centralized project management system, a typical project may involve spreadsheets for tracking, email for communication, maps for locations, separate documents for field information, and phone calls or text messages for status updates.

Similarly, contractors can access the work that has been assigned to them and see the information they need to complete their responsibilities without having to search through unrelated project information or lengthy email chains.

**A project manager can open ClickPM and quickly determine:**

Where a project stands • Which tickets are assigned • What has been completed • Which items require attention • How work is progressing.

### REAL-TIME VISIBILITY

Effective project management depends on having accurate information. ClickPM gives users visibility into the current status of projects and tickets so that decisions can be made based on the latest available information.

**What has been completed?**

**What is still outstanding?**

**Who is responsible for the work?**

**Which locations require attention?**

**Where are the contractors working?**

**How is the overall project progressing?**

**Less time collecting information.  
More time managing the project.**

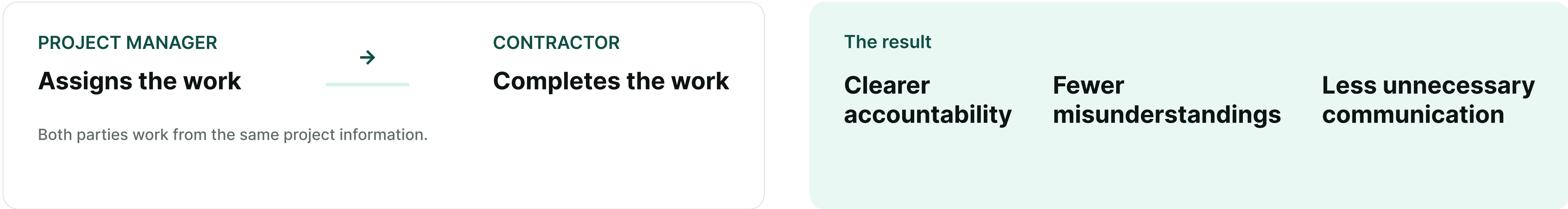
# Contractor Coordination

Clear assignments, shared information, less unnecessary communication.

SHARED WORKSPACE

ClickPM is designed to simplify the relationship between project managers and contractors.

Contractors can be provided with a dedicated workspace containing the work assigned to them. Individual tickets can provide the information necessary to understand the location, requirements, and status of the work.



Instead of relying heavily on separate emails, spreadsheets, phone calls, and text messages, ClickPM keeps the project manager and contractor connected to the same source of work information.

# Location Visibility & Route Planning

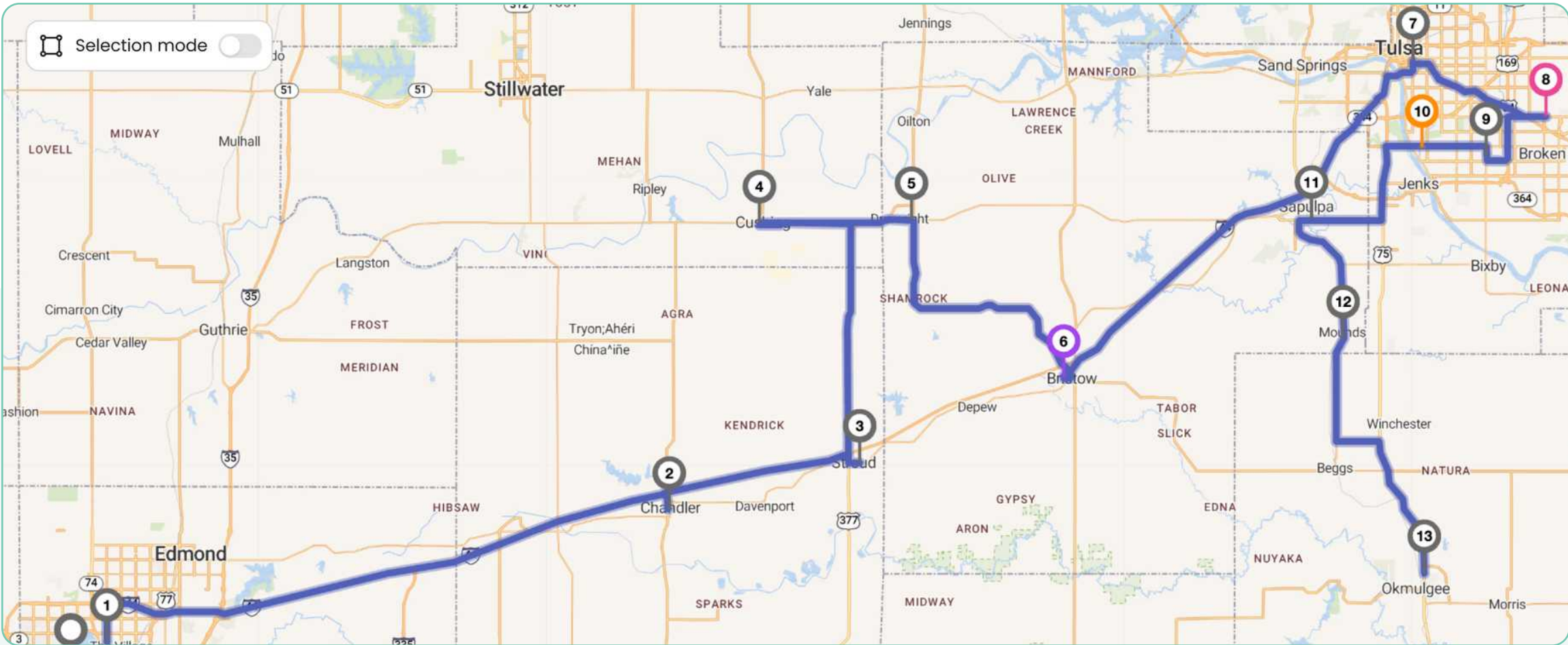
See where the work is, and organize how to get there.

MAP-BASED WORK

For projects involving multiple physical locations, geography can become an important part of project execution.

MAP VIEW

Tickets and project locations can be reviewed geographically, then assigned to contractors accordingly.



## ClickPM can also help organize routes between multiple job sites.

For a contractor working at several locations during the same day, this can reduce the amount of manual route planning required. Instead of individually looking up addresses and determining the most efficient order of travel, locations can be organized into a more efficient route.

PROJECT VIEW

Understand how work is distributed across the project — even when many locations are active at the same time.

# Less Administration. Better Control.

Designed to save time without adding complexity.

EFFICIENCY

## Saving Time

ClickPM is intended not only to organize projects but also to reduce the administrative effort required to manage them. A considerable amount of project management time can be spent searching for information, updating spreadsheets, asking for status updates, determining who has been assigned to a location, reviewing separate documents, planning contractor routes, and reconciling information from multiple sources.

CENTRALIZE THE REPETITIVE WORK

**Status • Assignments • Locations • Routes • Updates**

## Saving Time

ClickPM is intended not only to organize projects but also to reduce the administrative effort required to manage them. A considerable amount of project management time can be spent searching for information, updating spreadsheets, asking for status updates, determining who has been assigned to a location, reviewing separate documents, planning contractor routes, and reconciling information from multiple sources.

PROJECT MANAGER

**Broad project  
visibility**

CONTRACTOR

**Assigned  
work & details**

EXECUTIVE

**Progress &  
performance**

# The ClickPM Approach

Structure the complexity. Keep the work understandable.

## PROJECT CONTROL

As projects become larger, maintaining control becomes increasingly difficult.

A small project may be manageable through email and spreadsheets. A project involving hundreds of sites, contractors, and individual tasks is considerably more difficult to manage using the same approach.

ClickPM is built around this straightforward principle.

**PROJECT MANAGEMENT SHOULD MAKE THE WORK EASIER TO MANAGE—NOT CREATE ADDITIONAL WORK FOR THE PEOPLE MANAGING IT.**

Projects, tickets, assignments, updates, locations, contractor activity, and performance information can be managed within the same environment. The objective is not simply to collect more data. It is to make the information required to manage the project easier to access and act upon.

By bringing project information, field activity, contractors, tickets, locations, and performance into one system, ClickPM helps teams spend less time searching for information and more time completing the work.

**Clarity without unnecessary complexity.**

# About This Manual

From understanding the platform to performing everyday tasks.

MANUAL STRUCTURE

This manual is designed to help users understand how to navigate and use **ClickPM** effectively.

**PART 1   Introduction to ClickPM**

Provides an overview of the platform, what it does, and how it can help users manage projects more efficiently.

**PART 2   Core Functions & Workflows**

Provides step-by-step guidance for the primary ClickPM functions and workflows.

THE GOAL

Understand not only how to use ClickPM, but also how ClickPM can make everyday project responsibilities easier, faster, and more organized.

CLICK

PROJECTS  
PEOPLE  
PROGRESS  
TOGETHER

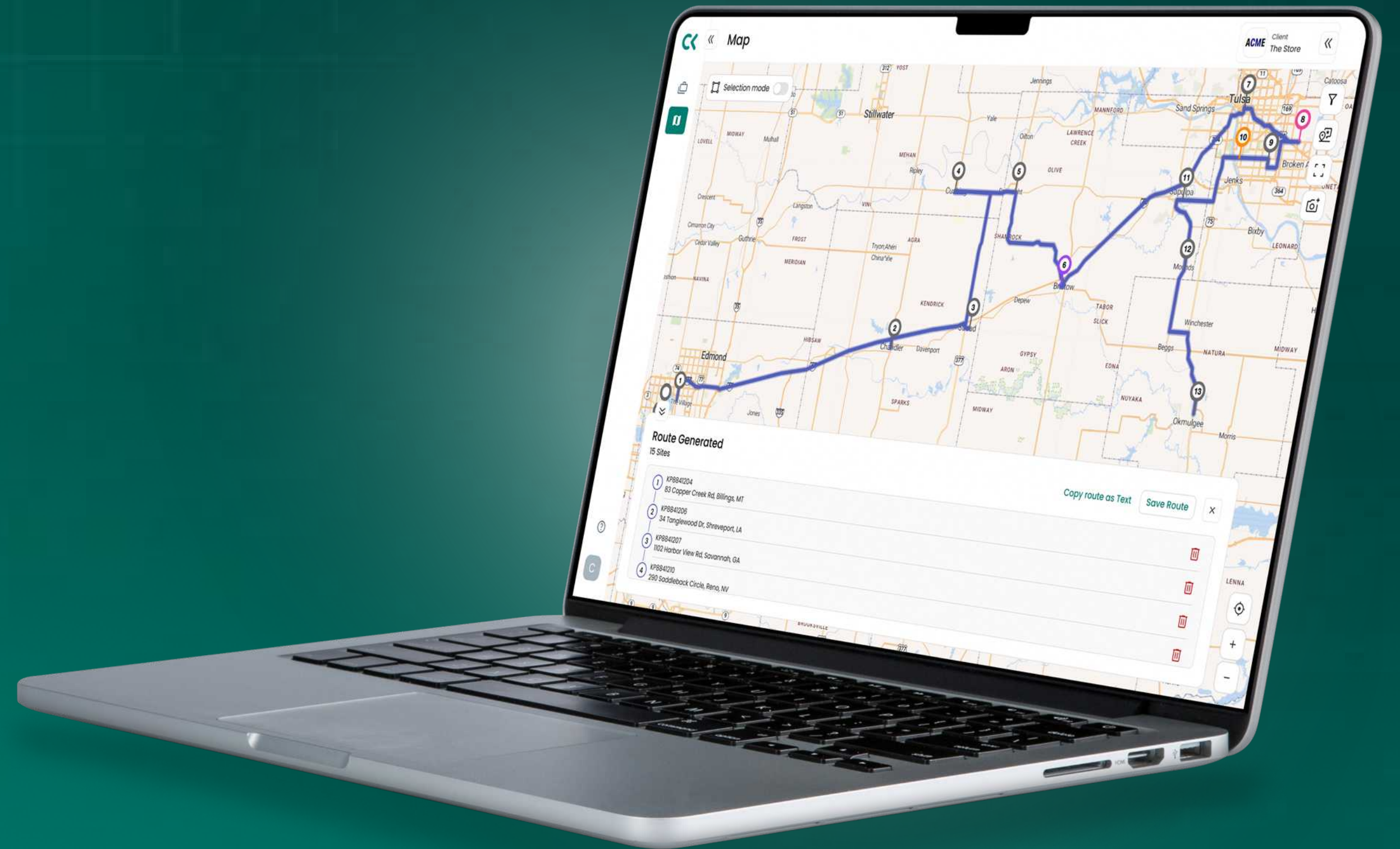
Part 1 — Introduction to ClickPM

# Thank You for Using ClickPM

Built to simplify multi-site  
project management.

## PART 1 — INTRODUCTION TO CLICKPM

This manual is designed to help teams  
navigate ClickPM with clarity and confidence.  
From understanding the platform to managing projects,  
contractors, locations, routes, and day-to-day workflows.



Projects • Tickets • Contractors • Locations • Routing • Progress

[clickpm.io](https://clickpm.io)

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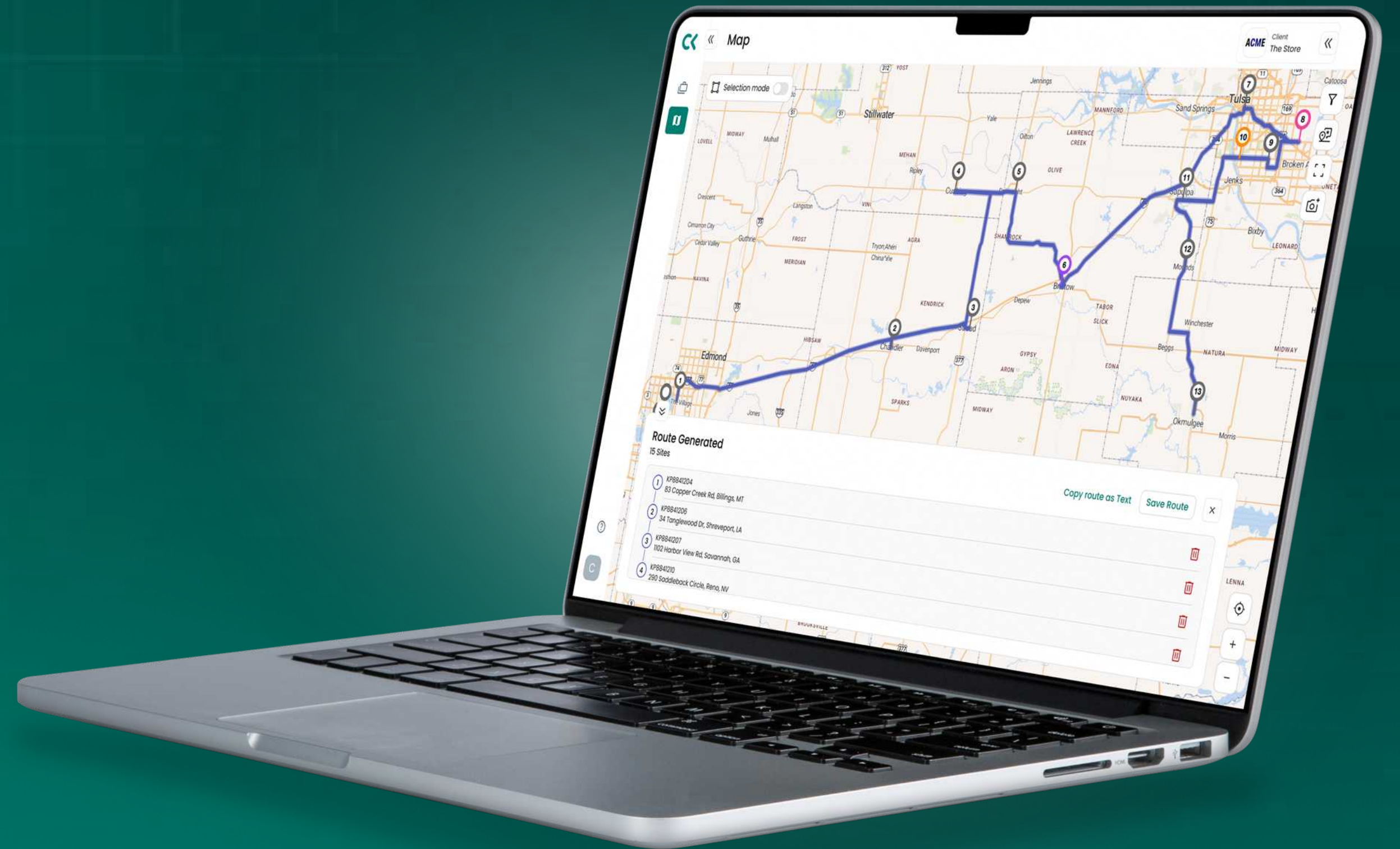
PROJECTS  
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USER MANUAL

# ClickPM User Guide

PART 2 — CORE FUNCTIONS & WORKFLOWS

A practical guide for setting up, executing, monitoring, and reporting multi-site projects.



Plan • Coordinate • Execute • Deliver

[clickpm.io](https://clickpm.io)

# Table of Contents

Find the workflows, roles, and instructions most relevant to your day-to-day work.

## How to use this guide.

|   |                                      |    |
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| 1 | Environment Setup .....              | 03 |
| 2 | Project Setup & Administration ..... | 08 |
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| 4 | Map Planning & Navigation .....      | 18 |
| 5 | Performance Oversight .....          | 22 |
| 6 | Billing & Exports .....              | 23 |

## Who this guide is for?

- SUPER ADMINS** Configure the ClickPM environment, clients, labels, and access rules.
- ADMINS** Manage projects, tickets, oversight, performance, billing, and exports.
- OPERATORS** Work with assigned tickets, submit progress, and use field maps, and routes.



**READING TIP** Menu names, tab names, and buttons are shown in bold. Screen layouts may change slightly as ClickPM is updated.

1

ENVIRONMENT SETUP

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Ticket Labels Setup

Client Setup

Access & Cross-Client Rules

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# Ticket Labels Setup

## MANAGE STATUSES

Manage ticket statuses to define and track the progress of tickets, helping users quickly understand the current state of work through clear labels and colors

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Management

Clients

Users

Groups

Statuses

Assignments

Search

| Status Name | Type   | Color | Action |
|-------------|--------|-------|--------|
| Unassigned  | System |       | ...    |
| Assigned    | System |       | ...    |
| Pending     | System |       | ...    |
| Completed   | System |       | ...    |
| Paused      | User   |       | ...    |

Records per page: 25

1-5 of 5

Samsuperadmin  
Superadmin

1

Go to Management.

2

Select Statuses tab.

3

Add new Status.

4

Edit/Customize an existing Status.

i

Custom statuses that you create yourself to match your workflow.

i

Built-in statuses that come with the app and cannot be removed.

i

Customizable color to help you quickly spot ticket's state.

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# Ticket Labels Setup

## MANAGE ASSIGNMENTS

Manage assignments to define the type of work a ticket represents inside a project.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

1

Go to Management.

Management

Clients

Users

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Assignments

Search

| Assignment Name     | Action            |
|---------------------|-------------------|
| Sustainment         | ...               |
| New Store/Relo/Reno | <div>Edit</div>   |
| Asset Tagging       | <div>Remove</div> |

Records per page: 25 1-3 of 3

2

Select Assignments tab.

3

Add new Assignment.

+ Add new Assignment

4

Edit/Delete an existing Assignment.

i

Assignments are categories that describe the type of work a ticket represents.

S

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# Client Setup

## MANAGE CLIENTS 1/2

Add and configure clients to group projects and tickets by organization or business unit.  
Pick the statuses and assignments available for each client to ensure the correct workflow is used.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Management

2

Select **Clients** tab.

3

Add new **Client**.

1

Go to **Management**.

i

Click on desired client row to update its details

Customer OVERSIGHT

Search

| Name      | Short | Notes | Enabled |
|-----------|-------|-------|---------|
| BASE      | BASE  |       | Yes     |
| OVERSIGHT | OVST  |       | Yes     |

Records per page: 25 1-2 of 2

S Samsuperadmin Superadmin

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# Client Setup

## MANAGE CLIENTS 2/2

Add and configure clients to group projects and tickets by organization or business unit.  
Pick the statuses and assignments available for each client to ensure the correct workflow is used.

CLICK

<< Management

Project Management

Work Portal

Performance Dashboard

Map

Management

OVERSIGHT

Client Name \*

The Full Name of the Client

Client Short \*

The abbreviation of the Client. Used in file downloads and in condensed views

Statuses \*

Statuses will be displayed in the order of selection

Assignments \*

Assignments will be displayed in the order of selection

Store Format

The store number format in the excel sheet

Supplier AP

Notes

Additional information about the Client

OVERSIGHT

OVST

Unassigned, Assigned, Pending, Completed

Sustainment, New Store/Relo/Reno, Asset Tagging

Text

OVST1

Delete

Disable

Cancel

Submit

S Samsuperadmin Superadmin

i

Ticket statuses available for this client and the order in which they are shown.

i

Ticket work categories available for this client and the order they appear.

i

Format used for store numbers, such as plain text, numbers only, or with leading zeros (e.g., 007).

i

A default **Supplier Accounts Payable** reference used when generating invoices and reports.

1

Update fields.

2

Save changes.

1

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# Access & Cross-Client Rules

## AUTO-AUTHORIZE ASSIGNEES BETWEEN DIFFERENT CLIENTS

Automatically grant Assignees permission to switch between clients upon project import. This removes the need to manually configure user access and group assignments for each client.

CLICK

<<

Client Settings

Customer Oversight

Project Management

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Client Settings

All Settings

Operation

User Interface

Identity

Features

Auto-authorize contractors to switch clients

When importing projects, automatically authorize contractors to switch between clients

1

Open user options list and choose **Client Settings**.

2

Select **Features** tab.

3

Enable **Auto-authorize** feature tab.

4

Apply changes.

i

If you want tighter control, turn this off and manage users and groups manually instead.

Save

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# Data Import

## IMPORT PROJECT 1/2

Quickly add one or multiple projects to the system by importing project data from an external source through a structured Excel file.

CLICK

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Performance Dashboard

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Database Management

Project Management

SELECT PROJECT TO SEE STATS

Import Project

Project Report

Projects

Tickets

Updates

Metadata

Search

Filter

| <input type="checkbox"/> | Project Name | Abbr | Status | Assignees | Action |
|--------------------------|--------------|------|--------|-----------|--------|
| No projects found.       |              |      |        |           |        |

S

Samsuperadmin  
Superadmin

1

Go to  
Project Management.

2

Click on **Import project**.

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# Data Import

## IMPORT PROJECT 2/2

Quickly add one or multiple projects to the system by importing project data from an external source through a structured Excel file.

CLICK

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<< < Project Import

Customer RAVIOLI

Important Notes

- Single Project Import: Ensure each ticket entry has the same project name to avoid creating multiple projects.
- Multiple Projects Import: Ensure each ticket entry has a corresponding project name. If project name doesn't exist, the ticket will be ignored.

Upload Spreadsheet \*

Use the example spreadsheet format.

4

Upload your project excel sheet.

Click to upload or drag and upload

CSV, Xlsx, Xls (max 25mb)

NTST-NEW-2026-08-20 11\_02\_05.xlsx

Excel Spreadsheet (.xlsx) | 25.31 KB

Download Template

3

Download the template, review the structure and fill in your project data.

Import File

5

Confirm your project import.

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# Project Maintenance

## UPDATE PROJECT

Edit project details such as the project name, short name, and notes to keep project information accurate and up to date.

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SELECT PROJECT TO SEE STATS

Import Project

Project Report

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Metadata

Search

Filter

| Project Name | Abbr  | Status | Assignees               | Action |
|--------------|-------|--------|-------------------------|--------|
| PILOT        | PILOT | Active | Emily Brown, John Smith | ...    |

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

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Superadmin

1

Select **Projects** tab.

2

Open the Action options list.

3

Choose **Edit Project** option.

i

Mark project as inactive. Archive a project to hide it from the main active list.

# Project Oversight

## TRACK PROJECTS

Monitor the health and progress of multiple projects through key statistics.

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<< Project Management

Completed Tickets26 / 82

Status Updates26 C / 42 A / 5 P

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

| Project Name | Abbr  | Status | Assignees               | Action |
|--------------|-------|--------|-------------------------|--------|
| PILOT        | PILOT | Active | Emily Brown, John Smith | ...    |

1 record selected.

Records per page: 25 1-1 of 1

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(C): Completed  
(A): Assigned  
(P): Pending

Fees (X / Y)  
X: Assignee fees for tickets with a Completed Date.  
Y: Assignee fees for all tickets

Revenue (X / Y)  
X: Revenue for tickets with a "Completed Date"  
Y: Revenue for all selected tickets

Users assigned to project.

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# Ticket Maintenance

## UPDATE TICKET AS AN ADMINISTRATOR 1/2

Edit one or more ticket details as an administrator. Use it to make corrections or perform bulk updates.

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<< Project Management

Customer OVERSIGHT

Completed Tickets  
26 / 82

Fees ⓘ  
\$46,800.00 / \$147,600.00

Status Updates  
26 C / 42 A / 5 P

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

| ✓ | Project Name | Abbr  | Status   | Assignees               | Action |
|---|--------------|-------|----------|-------------------------|--------|
| ✓ | PILOT        | PILOT | • Active | Emily Brown, John Smith | ...    |

1 record selected. Records per page: 25 1-1 of 1

S Samsuperadmin Superadmin

1 Go to Project Management.

2 Select one or more projects to view their corresponding tickets.

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# Ticket Maintenance

## UPDATE TICKET AS AN ADMINISTRATOR 2/2

Edit one or more ticket details as an administrator. Use it to make corrections or perform bulk updates.

Project Management

Completed Tickets  
26 / 82

Status Updates  
26 C / 42 A / 5 P

Fees ⓘ  
\$46,800.00 / \$147,600.00

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Filter

Update Selected

+ Add Ticket

| <input type="checkbox"/> | Ticket          | ate | Due Date   | Assignees   | Store     | Address                                            | City          | State | Country | Action                                |
|--------------------------|-----------------|-----|------------|-------------|-----------|----------------------------------------------------|---------------|-------|---------|---------------------------------------|
| <input type="checkbox"/> | PILOTAGHL-10241 |     | 09/01/2026 |             | GHL-10241 | 4021 HILLSBORO PIKE, NASHVILLE, TN 37215, USA      | NASHVILLE     | TN    | USA     | ...                                   |
| <input type="checkbox"/> | PILOTACRN-10254 |     | 09/01/2026 | John Smith  | CRN-10254 | 151 SOCKANOSSET CROSS RD, CRANSTON, RI 02920, USA  | CRANSTON      | RI    |         | <div>Update<br/>Edit<br/>Remove</div> |
| <input type="checkbox"/> | PILOTACGB-10190 | 226 | 09/01/2026 |             | CGB-10190 | 6701 SW 57TH AVE, SOUTH MIAMI, FL 33143, USA       | SOUTH MIAMI   | FL    |         |                                       |
| <input type="checkbox"/> | PILOTAPTH-10238 |     | 06/22/2026 | Emily Brown | PTH-10238 | 450 RHODE ISLAND ST, SAN FRANCISCO, CA 94107, USA  | SAN FRANCISCO | CA    |         |                                       |
| <input type="checkbox"/> | PILOTASTC-10267 |     | 06/15/2026 | Emily Brown | STC-10267 | 29955 STEVENS CREEK BLVD, CUPERTINO, CA 95014, USA | CUPERTINO     | CA    | USA     | ...                                   |
| <input type="checkbox"/> | PILOTAHSK-11110 | 226 | 09/01/2026 | John Smith  | HSK-11110 | 63-97 KENSINGTON HIGH ST, LONDON, GBR 85, GBR      | LONDON        | GBR   | GBR     | ...                                   |
| <input type="checkbox"/> | PILOTACIC-10170 |     | 09/07/2026 | Emily Brown | CIC-10170 | 6020 N CICERO AVE, CHICAGO, IL 60646, USA          | CHICAGO       | IL    | USA     | ...                                   |
| <input type="checkbox"/> | PILOTAPTL-10291 |     | 09/01/2026 | John Smith  | PTL-10291 | 2 SOMERSET ST, PORTLAND, ME 04101, USA             | PORTLAND      | ME    | USA     | ...                                   |

Optionally you could update tickets in bulk by selecting them, and clicking on **Update Selected**.

4  
Manually add ticket.

4  
Quickly update the ticket's details using a short form (status, assignee(s) or notes).

Each quick update creates a new update record.

4  
Edit and update ticket information using the full form.

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# Progress Reporting

## UPDATE TICKET AS AN ASSIGNEE 1/2

Update and report progress on assigned tickets.

CLICK

Work Portal

Map

Work Portal

Map

Go to Work Portal.

Work Portal

Project  
PILOT

Search

VOS-10552

Pending

Location  
1407 S VOSS RD, HOUSTON, TX 77057, USA

Ticket  
PILOTAVOS-10552

Project  
PILOT

WorkTask#  
VOS-10552

Due Date  
07/27/2026

Assignees  
John Smith

Notes

Update Notes  
Updated to pending

INK-10513

Assigned

Asset Tagging

Location  
348 HARRISON AVE, BOSTON, MA 02118, USA

Ticket  
PILOTAINK-10513

Project  
PILOT

WorkTask#  
INK-10513

Due Date  
09/01/2026

Assignees  
John Smith

Notes

Update Notes

POA-10251

Pending

Asset Tagging

Location  
1700 POST OAK BLVD, HOUSTON, TX 77056, USA

Ticket  
PILOTAPOA-10251

Project  
PILOT

WorkTask#  
POA-10251

Due Date  
07/27/2026

Assignees  
John Smith

Notes

Update Notes  
Updated to "Pending"

CMP-10497

Assigned

Asset Tagging

Location  
10113 LOUETTA RD, HOUSTON, TX 77070, USA

Ticket  
PILOTACMP-10497

Project  
PILOT

WorkTask#  
CMP-10497

Due Date  
07/13/2026

Assignees  
John Smith

Notes

Update Notes

LNF-10452

Assigned

Asset Tagging

Location  
1200 MARKET ST, LYNNFIELD, MA 01940, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

WLY-10413

Assigned

Asset Tagging

Location  
442 WASHINGTON ST, WELLESLEY, MA 02482, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

RWF-10235

Assigned

Asset Tagging

Location  
11355 WOODGLEN DR, ROCKVILLE, MD 20852, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

COD-10370

Assigned

Asset Tagging

Location  
390 CODDINGTON TOWN CTR, SANTA ROSA, CA 95401, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

Customer OVERSIGHT

Export Assignee

View on Map

Filter

1

Select desired Client.

i

Choose All Clients to be able to switch between projects from different clients.

3

Click on update button.

i

View current selected project tickets on map.

J

John Smith  
Contractor

1

ENVIRONMENT SETUP  
SUPER ADMINS

2

PROJECT SETUP & ADMINISTRATION  
ADMINS

3

**TICKET WORK**  
ADMINS / OPERATORS

Ticket Maintenance  
**Progress Reporting**  
Ticket Maintenance

4

MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS

5

PERFORMANCE OVERSIGHT  
ADMINS

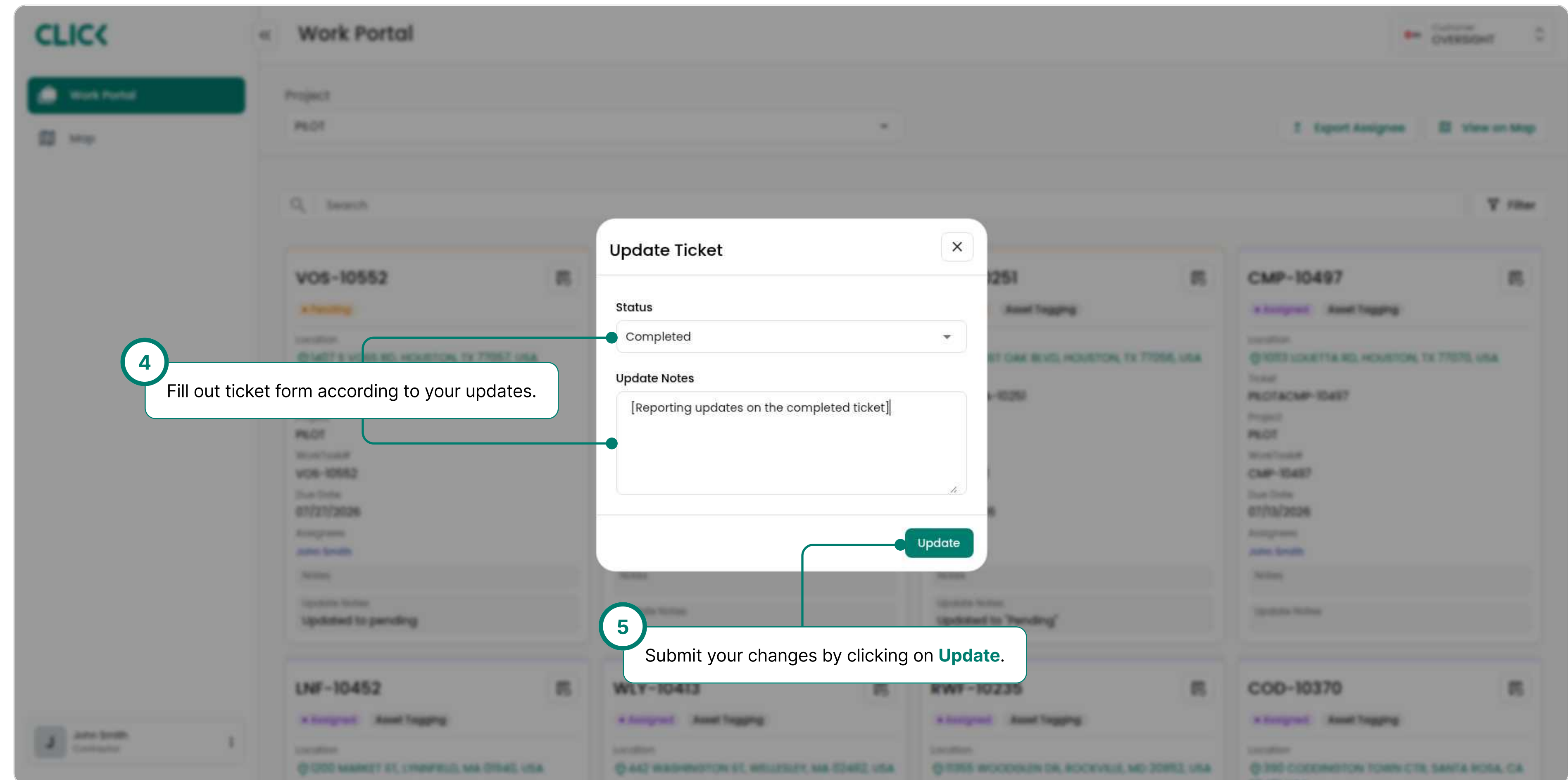
6

BILLING & EXPORTS  
ADMINS

# Progress Reporting

## UPDATE TICKET AS AN ASSIGNEE 2/2

Update and report progress on assigned tickets.



- 1

ENVIRONMENT SETUP  
SUPER ADMINS
- 2

PROJECT SETUP & ADMINISTRATION  
ADMINS
- 3

TICKET WORK  
ADMINS / OPERATORS  
Ticket Maintenance  
Progress Reporting  
Ticket Maintenance
- 4

MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS
- 5

PERFORMANCE OVERSIGHT  
ADMINS
- 6

BILLING & EXPORTS  
ADMINS

# Ticket Maintenance

## TRACK TICKET UPDATES 1/2

Follow the ticket’s progress over time by seeing who did what and when.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

<< Project Management

Customer OVERSIGHT

Completed Tickets  
26 / 82

Fees ⓘ  
\$46,800.00 / \$147,600.00

Status Updates  
26 C / 42 A / 5 P

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

| ✓ | Project Name | Abbr  | Status   | Assignees               | Action |
|---|--------------|-------|----------|-------------------------|--------|
| ✓ | PILOT        | PILOT | • Active | Emily Brown, John Smith | ...    |

1 record selected.

Records per page: 25 1-1 of 1

S Samsuperadmin  
Superadmin

1 Go to Project Management

2 Select one or more projects to view their corresponding ticket updates.

- 1

ENVIRONMENT SETUP  
SUPER ADMINS
- 2

PROJECT SETUP & ADMINISTRATION  
ADMINS
- 3

TICKET WORK  
ADMINS / OPERATORS  
Ticket Maintenance  
Progress Reporting  
Ticket Maintenance
- 4

MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS
- 5

PERFORMANCE OVERSIGHT  
ADMINS
- 6

BILLING & EXPORTS  
ADMINS

# Ticket Maintenance

## TRACK TICKET UPDATES 2/2

Follow the ticket’s progress over time by seeing who did what and when.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

<< Project Management

3 Select Updates tab.

Completed Tickets  
26 / 82

Status Updates  
26 C / 42 A / 5 P

Fees ⓘ  
\$46,800.00 / \$147,600.00

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search Filter

| Project | Store     | Address                                    | Status               | Assignee    | Time                | Notes                  | Actions |
|---------|-----------|--------------------------------------------|----------------------|-------------|---------------------|------------------------|---------|
| PILOT   | HGM-10159 | 94 DERBY ST, HINGHAM, MA 02043, USA        | Assigned → Completed | Emily Brown | 09/08/2026 09:47 PM | Updated to "Completed" | ...     |
| PILOT   | POA-10251 | 1700 POST OAK BLVD, HOUSTON, TX 77056, USA | Assigned → Pending   | John Smith  | 09/08/2026 09:46 PM | Updated to "Pending"   | ...     |

Records per page: 25 1-2 of 2

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Optionally delete unwanted ticket updates.

- 1
- ENVIRONMENT SETUP  
SUPER ADMINS
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- TICKET WORK  
ADMINS / OPERATORS
- 4
- MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS
- 
- Map Navigation  
Bulk Dispatch  
Route Planning
- 5
- PERFORMANCE OVERSIGHT  
ADMINS
- 6
- BILLING & EXPORTS  
ADMINS

# Map Navigation

## EXPLORE PROJECTS VISUALLY

View tickets for selected project(s), plotted by location. Use it to explore work geographically, filter tickets, select groups for bulk updates.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

1 Go to Map.

i Toggle clustering option.

i Nearby tickets are grouped into clusters to keep the map clear. Zoom in to separate and view individual tickets.

2 Filter tickets.

3 Display filtered tickets.

Customer OVERSIGHT

Filter Tickets by

Project

PILOT

Store

Assignee

Status

Assignment

Reset Filter

Show Results

82 Total Tickets

Assigned (42)

Completed (26)

Unassigned (9)

Pending (5)

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Last Updates

# Bulk Dispatch

## BULK ASSIGNMENT IN MAPS

Update multiple ticket participants or due dates all at once in a visual way.

USER TRAINING

SECTION 4 OF 6

- 1 ENVIRONMENT SETUP  
SUPER ADMINS
- 2 PROJECT SETUP & ADMINISTRATION  
ADMINS
- 3 TICKET WORK  
ADMINS / OPERATORS
- 4 MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS
  - Map Navigation
  - Bulk Dispatch**
  - Route Planning
- 5 PERFORMANCE OVERSIGHT  
ADMINS
- 6 BILLING & EXPORTS  
ADMINS

CLICK

Project Management

Work Portal

Performance Dashboard

**Map**

Management

Map

Clustering

Selection Mode

Generate Route

1

Enable selection mode.

2

Select tickets one by one or in a group. Hold Ctrl while clicking individual tickets or dragging to select a group.

3

Fill out desired fields.

4

Bulk assign tickets.

Customer OVERSIGHT

Manage Tickets (4)

Leave fields empty to avoid updating them.

Assignees

Emily Brown

Due Dates

09/17/2026

Clear all assignees

Save Change

- 1
- ENVIRONMENT SETUP  
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- MAP PLANNING & NAVIGATION  
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- Route Planning
- 5
- PERFORMANCE OVERSIGHT  
ADMINS
- 6
- BILLING & EXPORTS  
ADMINS

# Route Planning

## ROUTE GENERATION 1/2

Build an optimized driving route from the selected places, then save or copy the stop list for field use.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

Generate Route

1

Enable selection mode.

3

Generate route.

2

Select tickets one by one or in a group. Hold Ctrl while clicking individual tickets or dragging to select a group.

Customer OVERSIGHT

Manage Tickets (4)

Leave fields empty to avoid updating them.

Assignees

Emily Brown

Due Dates

09/17/2026

Clear all assignees

Save Change

S Samsuperadmin Superadmin

- 1
- ENVIRONMENT SETUP  
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- BILLING & EXPORTS  
ADMINS

# Route Planning

## ROUTE GENERATION 2/2

Build an optimized driving route from the selected places, then save or copy the stop list for field use.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

POA-10251  
1700 POST OAK BLVD, HOUSTON, TX 77056, USA

VOS-10552  
1407 S VOSS RD, HOUSTON, TX 77057, USA

SGL-10258  
15900 SOUTHWEST FWY, SUGAR LAND, TX 77478, USA

KTY-10474  
6601 S FRY RD, KATY, TX 77494, USA

Copy route as Text

Save Route

Customer OVERSIGHT

Open saved routes.

Manage saved routes.

Copy route as Text or save route for future access.

# Team Monitoring

## TRACK ASSIGNEE PERFORMANCE

Track how Assignees are performing on a project, including workload and progress at a glance.

- 1 ENVIRONMENT SETUP  
SUPER ADMINS
- 2 PROJECT SETUP & ADMINISTRATION  
ADMINS
- 3 TICKET WORK  
ADMINS / OPERATORS
- 4 MAP PLANNING & NAVIGATION  
ADMINS / OPERATORS
- 5 PERFORMANCE OVERSIGHT  
ADMINS
- 6 BILLING & EXPORTS  
ADMINS
- Team Monitoring

CLICK

Project Management

Work Portal

**Performance Dashboard**

Map

Management

Performance Dashboard

Project  
PILOT

Completed Tickets 1/14

Status 1 C / 13 A / 0 P

Search

| Assignee    | Tickets | Uncompleted | Completed | Completion % | Billed % | Action |
|-------------|---------|-------------|-----------|--------------|----------|--------|
| Emily Brown | 34      | 34          | 0         | 0%           | 0%       |        |
| John Smith  | 14      | 13          | 1         | 7.14%        | 7.14%    |        |

1 record selected.

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Superadmin

2 Select project.

1 Go to Performance Dashboard.

3 Select one or multiple Assignees to display performance statistics.

Fees (X / Y)  
X: Assignee fees for tickets with a Completed Date  
Y: Assignee fees for all tickets

Billed (X / Y)  
X: Revenue for tickets with a Billed Date  
Y: Remaining to be billed for work completed

Billed Stores %  
(Number of tickets with a Billed Date / Total number of selected tickets) \* 100

(C): Completed  
(A): Assigned  
(P): Pending

Revenue (X / Y)  
X: Revenue for tickets with a Completed Date  
Y: Revenue for all selected tickets

Percentage of tickets where this assignee is the primary assignee and the ticket is completed.

Percentage of tickets where this assignee is the primary assignee and the ticket has been billed

- 1

ENVIRONMENT SETUP  
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PERFORMANCE OVERSIGHT  
ADMINS
- 6

BILLING & EXPORTS  
ADMINS

Billing Operations  
Invoice Exports  
Project Exports

# Billing Operations

## UPDATE BILLING 1/2

Set or update the billing date for a project's tickets when you are ready to invoice or re-bill the work.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

<< Project Management

Completed Tickets  
26 / 82

Fees ⓘ  
\$46,800.00 / \$147,600.00

Status Updates  
26 C / 42 A / 5 P

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

| ✓ | Project Name | Abbr  | Status   | Assignees               | Action |
|---|--------------|-------|----------|-------------------------|--------|
| ✓ | PILOT        | PILOT | • Active | Emily Brown, John Smith | ...    |

1 record selected.

2

Open action options.

3

Click on Update Billing.

Edit Project

Update Metadata

Archive

Update Billing

Remove

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23

- 1
- ENVIRONMENT SETUP  
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# Billing Operations

## UPDATE BILLING 2/2

Set or update the billing date for a project's tickets when you are ready to invoice or re-bill the work.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Database Management

Maintenance

<< < Update Billing

Customer Oversight

Selected Project

PILOT

Change between different projects.

Search

Filter

Update Billing 4

|                                     | Ticket          | Status    | Assignee | Store     | Address                                                    | Billed Date |
|-------------------------------------|-----------------|-----------|----------|-----------|------------------------------------------------------------|-------------|
| <input checked="" type="checkbox"/> | PILOTAWPB-10529 | Completed | —        | WPB-10529 | 1845 PALM BEACH LAKES BLVD, WEST PALM BEACH, FL 33401, USA | —           |
| <input checked="" type="checkbox"/> | PILOTADVE-10549 | Completed | —        | DVE-10549 | 1903 S UNIVERSITY DR, DAVIE, FL 33324, USA                 | —           |
| <input checked="" type="checkbox"/> | PILOTAPOM-10352 | Completed | —        | POM-10352 | 2411 N FEDERAL HWY, POMPANO BEACH, FL 33064, USA           | —           |
| <input checked="" type="checkbox"/> | PILOTAMIA-10191 | Completed | —        | MIA-10191 | 299 SE 3RD ST, MIAMI, FL 33131, USA                        | —           |
| <input type="checkbox"/>            | PILOTACLW-10515 | Completed | —        | CLW-10515 | 27001 US HIGHWAY 19 N STE 8520, CLEARWATER, FL 33761, USA  | —           |
| <input type="checkbox"/>            | PILOTASSC-10477 | Completed | —        | SSC-10477 | 12150 BISCAYNE BLVD, NORTH MIAMI, FL 33181, USA            | —           |
| <input type="checkbox"/>            | PILOTACWD-10339 | Completed | —        | CWD-10339 | 3602 NORTHDAL BLVD, TAMPA, FL 33624, USA                   | 09/03/2026  |
| <input type="checkbox"/>            | PILOTAPEM-10193 | Completed | —        | PEM-10193 | 14996 PINES BLVD, PEMBROKE PINES, FL 33027, USA            | 09/03/2026  |
| <input type="checkbox"/>            | PILOTAJAX-10253 | Completed | —        | JAX-10253 | 10601 SAN JOSE BLVD, JACKSONVILLE, FL 32257, USA           | 09/03/2026  |
| <input type="checkbox"/>            | PILOTAWLL-10195 | Completed | —        | WLL-10195 | 2635 S STATE RD 7, WELLINGTON, FL 33414, USA               | 09/03/2026  |
| <input type="checkbox"/>            | PILOTANPL-10192 | Completed | —        | NPL-10192 | 9101 STRADA PL, NAPLES, FL 34108, USA                      | 09/03/2026  |

4

Select tickets that you want to update billing for.

5

Open billing modal, choose a date and submit.

- 1ENVIRONMENT SETUP  
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ADMINS
- Billing Operations
- Invoice Exports
- Project Exports

# Invoice Exports

## EXPORT INVOICE BACKUP 1/2

Generate a backup of invoice data for a selected billing date so you can keep accounting records or reissue invoice details.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

<<Project Management

Completed Tickets

26 / 82

Fees ⓘ

\$46,800.00 / \$147,600.00

Status Updates

26 C / 42 A / 5 P

Revenue ⓘ

\$104,000.00 / \$328,000.00

Import Project

Update an existing project or creating a new one

Project Report

Export all data for the selected projects.

1 Projects

Projects

Tickets1 Projects

Updates1 Projects

Metadata1 Projects

Search

Filter

| ✓ | Project Name | Abbr  | Status   | Assignees               | Action |
|---|--------------|-------|----------|-------------------------|--------|
| ✓ | PILOT        | PILOT | • Active | Emily Brown, John Smith | ...    |

1 record selected.

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

S Samsuperadmin

Superadmin

1Go to Project Management.

2Select your desired project.

3Click on Project Report.

|   |                                                 |
|---|-------------------------------------------------|
| 1 | ENVIRONMENT SETUP<br>SUPER ADMINS               |
| 2 | PROJECT SETUP & ADMINISTRATION<br>ADMINS        |
| 3 | TICKET WORK<br>ADMINS / OPERATORS               |
| 4 | MAP PLANNING & NAVIGATION<br>ADMINS / OPERATORS |
| 5 | PERFORMANCE OVERSIGHT<br>ADMINS                 |
| 6 | BILLING & EXPORTS<br>ADMINS                     |
|   | Billing Operations                              |
|   | Invoice Exports                                 |
|   | Project Exports                                 |

# Invoice Exports

## EXPORT INVOICE BACKUP 2/2

Generate a backup of invoice data for a selected billing date so you can keep accounting records or reissue invoice details.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Database Management

<<

< Project Report

Customer OVERSIGHT

Produce a multi-sheet spreadsheet showing the current status of the selected project, tickets, and the contractor links. Only projects for the current customer are shown.

Select a project

You can select/unselect multiple projects

PILOT

Report Type \*

Backup Invoice

Billing Date \*

2026-09-03

Export progress

100%

Export File

Files Exported

OVST\_2026-09-03.xlsx

Excel Spreadsheet (.xlsx) • 6.5 KB

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4 Choose Backup Invoice.

5 Choose specific Billing Date.

6 Launch the export process.

7 Save your exported file on your device.

- 1ENVIRONMENT SETUP  
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- Project Exports

# Project Exports

## EXPORT PROJECT(S) 1/2

Generate a report that contains all data for the selected project(s), so you can review or archive all project details in one file.

CLICK

Project Management

Work Portal

Performance Dashboard

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Management

<<Project Management

Completed Tickets  
26 / 82

Fees ⓘ  
\$46,800.00 / \$147,600.00

Status Updates  
26 C / 42 A / 5 P

Revenue ⓘ  
\$104,000.00 / \$328,000.00

Import Project  
Update an existing project or creating a new one

Project Report  
Export all data for the selected projects.  
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Filter

| ✓ | Project Name | Abbr  | Status   | Assignees               | Action |
|---|--------------|-------|----------|-------------------------|--------|
| ✓ | PILOT        | PILOT | • Active | Emily Brown, John Smith | ...    |

1 record selected.

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

S Samsuperadmin  
Superadmin

1Go to  
Project Management.

2Select your desired project.

3Click on **Project Report**.

- 1
- ENVIRONMENT SETUP  
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# Project Exports

## EXPORT PROJECT(S) 2/2

Generate a report that contains all data for the selected project(s), so you can review or archive all details for the selected project(s) in one file.

CLICK

<< < Project Report

Project report generated successfully

Customer OVERSIGHT

Project Management

Work Portal

Performance Dashboard

Map

Database Management

Produce a multi-sheet spreadsheet showing the current status of the selected project, tickets, and the contractor links. Only projects for the current customer are shown.

Select a project

You can select/unselect multiple projects

PILOT

Report Type \*

Project Report

Export progress

100%

Export File

Files Exported

OVST-PILOT-2026-09-08 14:54:54.xlsx

Excel Spreadsheet (.xlsx) • 20.6 KB

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Superadmin

5 Launch the export process.

4 Choose Project Report.

6 Save your exported file on your device.

Optionally you could adjust desired project(s) to export.

CLICK

USER MANUAL

PROJECTS  
PEOPLE  
PROGRESS  
TOGETHER

# Thank you for using ClickPM

PART 2 — CORE FUNCTIONS & WORKFLOWS

---



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