**PMT Pro - User FAQ (Frequently Asked Questions)**

**GENERAL USAGE**

**Q1: What is PMT Pro?** A1: PMT Pro is an AI-powered project management tool designed to help teams plan, collaborate, and execute projects more efficiently. It integrates traditional project management features like Kanban boards, task lists, timelines, and team chat with advanced AI capabilities including smart task prioritization, predictive analytics, and an expert chatbot assistant, along with on-tip-availability of everything about the project using Agentic RAG technology for keeping all informed with relevant information, for the ask.

**Q2: How is PMT Pro different from Basecamp, Trello, or Asana?** A2: Unlike those platforms, PMT Pro includes:

* A 24/7 AI assistant powered by a Retrieval-Augmented Generation (RAG) model
* Automatic task prioritization and deadline tracking
* Dynamic filtering by project context
* Meeting summaries, intelligent suggestions, and risk alerts
* A built-in document and link repository for each project

**Q3: What kind of users is PMT Pro designed for?** A3: PMT Pro is ideal for agile software teams, consultancies, distributed teams, and organizations managing multiple concurrent projects. It's built to be simple enough for daily users and powerful enough for technical and project leads.

**KANBAN BOARD & TASK MANAGEMENT**

**Q4: How do I use the Kanban board?** A4: The Kanban board displays tasks in four stages: To Do, In Progress, Review, and Done. You can drag and drop cards between stages, assign due dates, and add team members. Each card can also include notes and priority tags.

**Q5: What does the color-coded priority mean?** A5:

* Red: High priority
* Orange: Medium priority
* Green: Low priority These labels help you identify the urgency of each task.

**Q6: What is the difference between 'Tasks' and 'Kanban cards'?** A6: Tasks from the 'Tasks' page are general-purpose and can be assigned independently. Kanban cards represent workflow-based tasks tied to a process. PMT Pro allows both, and distinguishes them automatically in the To-Do List.

**TO-DO LIST & TIMELINE**

**Q7: How is the To-Do list organized?** A7: The To-Do list is automatically sorted by due date, with overdue tasks highlighted at the top. It combines tasks from both Kanban and general Task entries.

**Q8: Can I see my tasks on a calendar or timeline?** A8: Yes. You can view all tasks on a Day/Week/Month timeline and filter by project or team member.

**TEAM CHAT & COLLABORATION**

**Q9: How does team chat work in PMT Pro?** A9: The Team Chat module allows real-time collaboration between members. Each message is saved and indexed. Mentions (e.g., @john) notify specific users. The chat is tied to your project context.

**Q10: Can chats be converted into tasks?** A10: Yes. The chatbot can parse chat content and turn them into tasks with due dates and assignments using natural language commands.

**AI ASSISTANT (CHATBOT)**

**Q11: What does the chatbot do?** A11: The AI assistant can:

* Summarize recent project activity
* Prioritize your To-Do list
* Answer project-specific questions
* Suggest next steps or highlight risks
* Turn notes or chat into tasks

**Q12: What is RAG and why is it important?** A12: RAG stands for Retrieval-Augmented Generation. It enables the chatbot to search project documents, chat logs, task lists, and more before generating a response—ensuring it gives you accurate, up-to-date, and project-specific guidance.

**Q13: What kind of data can the chatbot use?** A13: The bot uses:

* Chat messages
* Kanban task metadata
* Timeline and To-Do lists
* Uploaded documents and notes
* Files and links shared in 'Important Files'

**UI AND FEATURES**

**Q14: What do the '+' and '-' icons on sections mean?** A14: These icons let you expand or collapse sections (like Chat, To-Do, or Files) to reduce clutter and focus only on what you need.

**Q15: What is the 'Important Files and Links' section?** A15: It’s a dedicated space to store key project files, URLs, and resources. All content here is also indexed by the AI for faster retrieval during chats.

**Q16: How does project filtering work?** A16: You can select your current project from a dropdown. Once selected, all views (Kanban, chat, tasks, files) automatically update to reflect that project only.

**ACCOUNTS & TEAMS**

**Q17: How do I know who's on my team?** A17: The top bar of PMT Pro shows team member initials, and hovering reveals full names. Team members also appear in tasks and chats.

**Q18: Can I invite new members or create a new team?** A18: Yes. You can invite members and assign them to projects or tasks. Admin roles can create and manage teams.

**Q19: How do I join a Team Meeting?** A19: Click the 'Team Meeting' link in the top navigation bar to instantly start or join a team video/audio session.

**SUPPORT & FEEDBACK**

**Q20: What if I find a bug or have a feature request?** A20: Use the chatbot or contact your admin to report issues or make suggestions. We welcome your feedback to continue improving PMT Pro.

**Q21: Can the chatbot be customized or trained further?** A21: Yes. It continuously improves as more documents and chat context are added. Future updates will support custom project goals, style preferences, and voice tuning.