

# PlanMill PROJECT

## Project Portfolio Management



### Plan & Execute Projects Smartly

- **My Workspace.** The main entry point includes Portfolios, KPIs, and Reports. Personalize your needs!
- **Project Portfolio Management (PPM).** Group projects to look at the big picture. Create and view portfolios and summaries.
- **Project & Task Management.** New project wizard guides you in the entire project creation process.
- **Sales Invoice & Accounting.** PlanMill Connector for Econet SaaS.
- **Accounts & Contacts.** Pivotal for prospects, customers, actions, requests, campaigns, partners, affiliates, suppliers, and others.
- **Opportunities.** Sales forecast in real-time, manage prospects and sale stages; update deals, and record customer interactions.
- **Requests.** Assign requests to different members of sales teams by email notifications.
- **Actions.** Keep track of customer activities. Plan meetings, export to calendar and monitor.
- **Collaboration & Document Library.** Store customer materials and activities; share with colleagues by email.
- **Analytics & Reporting.** Powerful analytics and seamless integration to financial applications for small to global services operation.
- **Connect & Upgrade.** Connect your applications via PlanMill Open API. CRM SaaS users can also upgrade easily to PlanMill PSA or ERP products.

### COMPLEX PROJECTS IN FOCUS

**CHALLENGE:** Are you confident in managing difficult projects using your current tools? Do you tackle time and expense reports concisely? Can you compare your budget to actual spending; understanding what percent of a project has been completed? Do you track and manage resources in order to bill customers accurately? Are your software systems non-integrated and labor-intensive? We have answers to these questions that can instantly support your business.

### STREAMLINE YOUR BUSINESS PROCESS

**SOLUTION:** In the world of project management, visibility is essential. Seamless and simple solutions result to better business management and organizational performance. Web-based PlanMill Project cuts away unnecessary activities already at planning stages.

This is the most comprehensive way to track project status and analyze profitability, identify and schedule the right teams and people for certain projects, manage time, expense, and billing accurately and consolidate manual reporting processes. Whether your team is small and local or large and global, automate and optimize your services operation, so you can relax and enjoy free time in between projects!

SMART WEB-BASED SOFTWARE SOLUTIONS FOR SERVICE BUSINESS — POWERED BY FINNISH INNOVATION

## Efficiency brings financial and environmental savings

### Create unlimited projects and tasks

Access all customer data in a single system — knowing and serving your customers better result to stronger and profitable relationships. Track all aspects of a project, including what's been billed, what has yet to be billed, how many hours have been logged, and how much the project will cost — an instant view shows what's been billed versus what's been budgeted.

### Flexibility with role-based permissions

Log specific work or support issues associated with each client. Assign tasks to specific resources within the organization. Set and track project budgets. Run comparison reports on budgets versus actual spending. Manage documents, process flows, and implementation plans within one complete project record. Users have different levels of access to data while billing rates can be associated with different consultants.

### Freedom of Choice

For companies who want an outsourced IT-server infrastructure and are comfortable with housing their customer information outside their firewall, PlanMill offers dedicated hosting capabilities through PlanMill SaaS. Customers receive all the benefits of hosted applications including regular upgrades and maintenance.

### PlanMill Quick Setup Pack

PlanMill Quick Setup Pack Includes remote hands-on session (est. 3 hrs) including basic configuration to fit your business process, user and team management, activation of customer instance and creation of first user.



### QUICK FACTS

- AVAILABILITY**  
 PlanMill SaaS – our IT environment  
 PlanMill On-Premise – your IT environment
- SYSTEM REQUIREMENTS**  
 PlanMill 12.1 or later versions (On-Premise users)
- MULTI-BROWSER SUPPORT**  
 Google Chrome, MS Internet Explorer, Mozilla Firefox and Safari
- LANGUAGES**  
 PlanMill provides you with interchangeable user language options in English, German and Finnish.
- ADD-ONS**  
 Robust PlanMill extensions such as Absence, Email Capture, Product Catalogue and Multicompany/currency are easily added.
- SERVICES**  
 Support, Deployment, Customization, Integration and Training to meet your unique business needs.
- EASILY DEPLOYED**  
 PlanMill PROJECT can be implemented quickly with no large IT infrastructure required. As a dynamic solution, it is suitable for growing, mid-sized and large organisations.
- 30-DAY FREE TRIAL**  
 Get a free trial at [www.planmill.com](http://www.planmill.com) or contact us through [sales@planmill.com](mailto:sales@planmill.com).

### More reasons to use PlanMill PROJECT SaaS

- All activities can be related to an account
- Integration with calendar and email
- Multi-currency, date formats and language for international companies
- Easy and cost effective upgrades
- Comprehensive Import and Export capabilities
- Social Media and Maps. Access, monitor, and deliver information using top social media channels: LinkedIn, Twitter and Google Maps.

### SUBSCRIPTION FEES

1-10 users: 35 e/user/ month  
 11-25 users: 30 e/user/ month

Prepaid discounts:  
 12 month period = 5% discount  
 24 month period = 10% discount  
 36 month period = 15% discount

Companies enjoy subscription-based pricing and volume discounts. To ask for special quotes, contact [sales@planmill.com](mailto:sales@planmill.com). For more information, see [www.planmill.com](http://www.planmill.com)