

# Full Feature List



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## Scheduling

Schedule your team and see the projects and tasks they are assigned to reflected in the resource Heatmap. Measure the level of utilization, see the allocations, and reorganize by just dragging and dropping. Allocate with the knowledge of day, week, and month view.

## Capacity Planning

Plan projects with focus on the capacity available. Make sure you have everything covered and set for starting the project. Everything is clearly illustrated in the platform.

## Project Allocation

Mark a project as a project allocation and allocate your team to it. Thereby you have their entire day available for planning. It's especially useful when leading agile teams.

## Task Allocation

Mark a project as a task allocation project, so you only see how the different tasks affect your team's utilization and when they are ready to take more tasks. Especially useful when working waterfall.

## Resource Heatmap

See how your team is utilized. You can see the distribution of allocations in hours at an individual level, whether the allocation is for a Project, Task, or Non-Project Time.

## Utilization

Make sure your team is working on the right things. Scope projects, assign team members, and follow the level of utilization so you make sure you have enough tasks for them and know how the future will look like in regards of capacity and hire/fire.

## Non-Project Time / Internal Time

Having your team working on non-project time such as workshops? Just mark it in their calendar and see it reflected in the heatmap. Thereby you know how much time they have for finalizing other tasks.

## Holidays

Holidays section ensures your team members are up to speed, rested and ready for new responsibilities and tasks. Make sure you know when they are away for holidays by allocating them and have it all reflected in the heatmap. Never overbook your team again.

## Upcoming Work

See upcoming work, tasks, and projects. Plan your time and the level of utilization across the company and team.

## Unassigned Tasks

In the Resource heatmap, you get the overview and can easily assign team members to the specific task. Simply by dragging the task or assigning via the task modal.



## Team Management

Help your team get transparency into what you are working on and why.

### Team Page

Admins can create teams across the entire platform, so Project Managers can easily assign the team to different projects. See and manage the teams and members at the team page.

### People List

Have the full overview of your employees. Manage permission levels, working hours and add or change internal hourly costs.

### Rate Cards

Create and use Rate Cards to track the cost of each project role. Set up different rate cards that may vary across projects.

Next  
[Project Management Features](#)



## Portfolio & Project View

View your projects on a portfolio or project level. Get the big picture you need and drill down into the smallest detail.

## Connected projects

Leading a cross-functional team? Connect projects and plan your tasks across the projects. Add transparency and make sprint planning easier.

## Project types

Run, plan, and deliver any project type from Time & Material, Fixed Price, and also Retainer projects.

## Project status with notes

Measure the status of the project and mark it with red, yellow or green and add notes as to why the decision was made.

## Day, month, and year view

View a project in a day, week or month view - you define the level of zoom and ensure you get the birds' eye view or the granular view when needed.

## Kanban board

Establish a Workflow and follow how tasks are being worked on, what is waiting for your client, and monitor the progress in real time.

## Workflow

Create any workflow you want and make sure the ways of working fit your needs.

## Gantt chart

Do you prefer the Gantt chart view? No worries. Plan your team members and projects in a Gantt chart view - zoom in or out to get the level of details or high level overview.

## Sprints

Plan your work, follow the running pace, the progress of the sprint, and see if your team is over or under performing.

## Scoping

Plan your projects with the help of AI. Get suggestions from the AI to make sure you choose the right person, role, and time estimation for a better and more precisely delivered task. Download and share the page.

## Milestones

Dividing the project into milestones or phases will help you be better in delivering on the promised day. Add tasks under each milestone and have your team work on them. Each task in To do, Progress, or Done, will affect the % completion in the milestone.



## Tasks

Plan tasks with assignees, descriptions, indicators, files and everything you need to work on the task.

## Subtasks

Add subtasks to your tasks with time estimations on and easy way to register time on them when finished.

## To Do's

Add to-do sections to your task to never miss a task related to the overall task.

## Multiple or Single Assignees

Make it easier to collaborate on tasks by assigning more than one person to the task. Have them comment, upload files, register time, and evolve on the task together.

## Approved/Not Approved Tasks

See what have been approved and not. Only approved tasks will reflect and influence the overall financials, time, and deadline.

## Block Tasks

Block tasks to avoid working on them. Easily unblock them when you are ready to start again.

## Dependencies

Having tasks dependent on each other? Add dependencies between tasks and make sure you get things done in the right order.

## Duplication of Tasks, Milestones & Projects

Having to work on the same task but just in another milestone or project?

Easily duplicate projects, milestones, and tasks.

## Deadlines

Mark deadlines and benefit from a platform that notifies you when a task is close to deadline. Organize your work and make sure you never miss a deadline again.

## Indicators

Use indicators to mark tasks. Easily filter on them and add them as tasks with high priority, bug, non-billable or blocked.

## Delays

Be warned about delays and when they are about to happen.

## Issue Management

Mark any task as an issue / bug to keep track of the quality of your work.

## Labels

Label your tasks and projects for a faster transparency and an easy way to see projects or tasks related to the specific label.

## File Management

Upload files and images to tasks and projects so you always have the files at hand. The file and folder system allows you to store and organize all of your project files in one place.



## Attachments

Add files from your computer or Google Drive to any task or project.

## Estimated Price

Based on assignees and forecasted time, you get an estimated price for the tasks and projects. It's easy to add to your proposal and see if you are earning money based on the initial scope.

## Actual Price

Based on rate cards and time registrations you can follow and see the actual price of the task and project. Real-time.

## Points or Hours

No matter how you estimate and report on the tasks, you can do it in hours or points. Every project or task worked on in points can be viewed in the budget page in the right currency.

## Project Contact

Easily see who is responsible for the project and contact the person. Notify the project contact or book meetings with the entire team.

## Timeline View

View your project portfolio or project in a timeline view, follow the progression and drill down to see the details. Helping you be in front of the problems and make it available for you to steer away.

## Progress Bar of Tasks

Follow the progression of the tasks and projects in an instant. See how the bar is filling up.

## Task ID

See the amount of tasks you have in your entire company, search for the ID, and sync it with other platforms.

## Project ID

See the amount of projects, follow how it increases, search for a specific project.

## Public Create Task Form

Do your clients often call and ask if you could add more tasks to the original scope? Make the job easier and more transparent by enabling public forms, with private links so your customer can always add requests. You can see it and approve it directly in the platform.

## Internal Projects

Working on internal projects that you don't get paid for? Monitor how much it's costing you and separate them from the reports.

## External Projects

Measure external projects and see how much you earn on each. Follow the progression as on every other project.

## Estimations in Forecast

With the Forecast AI, you get help when planning and working on the projects. See how much time you normally register, see what roles and persons you should assign tasks to, and be better at scoping projects, while your team is stronger and more precise when registering time.



## Planning Projects

See what projects you have in the pipeline and make them running when they are approved by the client or you are ready to start working on them.

## Running Projects

Run, manage, and deliver the promised projects. Mark your project as running when you are working on it. Follow the progression and monitor the status of the project.

## Halted Projects

Do you need to stop working on a project and you don't want to see the tasks in your team's schedule? Mark the project as halted and start working on it when you're ready by just shifting it to running.

## Done Projects

The project is delivered, the clients are happy, but you need to see what you've worked on in the last year. Mark the project as done, see how much you've earned, and analyse if you need to take more projects of that type in.

## Global Search

Find what you are searching for across projects, tasks, and people easily, and benefit from a global search where filters can be applied.

## Filters

Tailor your view and save your filters, so you can always return to the view you monitor or use the most.

## Permission Levels / Admin Controls

Give your team and company access to different parts of Forecast with different permission levels: Client user, virtual user, collaborator, manager, controller or admin.

## Task Modal

Have everything related to a task assembled on the task modal. Easily adjust estimated hours, assignees, add descriptions, dependencies or communicate directly with the team member on the task.

## Task Indicators

Mark the task as a bug, blocked, high priority or non-billable. See the task reflected in the budget if it's non-billable and easily filter on a task marked with a bug or high priority in the Workflow page. Blocked tasks prevent your team from working on them and are also marked in the timeline view.

## Task Owner of Followers

Need to follow a task closely? You can add Task Owners or Followers to a specific task. This enables transparency into the progression of the task and makes sure the task owners or followers are always notified - in app or via email, when changes appear.

Next  
Team Management Features





## Share Report w/o Login

Collaborate across companies with clients and other departments by sharing reports, even though not everyone has access.

## Task Comments

Comment on tasks and make a strong collaboration around the task.

## Task Attachments

Attach files, images, or whatever needed.

## Task Followers

Have your team collaborate on a task without it being reflected in others' schedule, mark them as followers, and have more people to follow the task.

## Task Owners

Need to make somebody on top of a specific task? Make them the task owner, so they get notified every time there's a change to the task.

## Activity Log

What is going on with a specific task? Check the Activity log and see who made changes, updated it, or worked on it.

## In-App Notifications

Get in-app notifications to always be in the know. Tailor what you need to follow and get notified.

## E-mail Notifications

Prefer to get updates directly in your inbox? Tailor what you need to receive and get notified real-time.

## File Sharing

Share files across teams on a specific task and integrate with Drive for faster integrations and most up-to-date content.

## Project Status

Follow the project status and the thoughts behind it across management team. See what to act on and where to collaborate.

## Sprints

Work in sprints and make sure the team delivers. Follow the running pace and the progress in just one view or report for stronger client collaboration.

## Descriptions

Describe the task and ensure every relevant information about the task is accessible.

## Progress

Check progress in real-time. Based on time entries and how your team is working on the task, so you can follow the progression.

## Recent Activity

Forgot what task you worked on? No need to worry. In Forecast, it's easy to find it by using the filter. Register time, comment, or start working on the task again.



## Book Meeting Directly

Save time and be more efficient when inviting the team for kickoffs, workshops or anything else.

## Datapush Real-Time

Strengthen the collaboration by aligning everyone real-time with datapush. This way you'll always be on top of projects and tasks, even though you work in different departments or in different countries.

## Client Users & Client Page

Invite your client to the platform to follow the tasks you assign them to. Add information about the client on their own client page and have it aligned with your financial information.

Next  
Time Management Features



## Time Tracking

Save time and be more efficient when inviting the team for kickoffs, workshops or anything else.

## Non-Billable Time

Strengthen the collaboration by aligning everyone real-time with datapush. This way you'll always be on top of projects and tasks, even though you work in different departments or in different countries.

## Manual Input

Whether you prefer to add time automatically or manually, you can do so in Forecast. The AI suggest you how much time to register on a given task or you simply add the time yourself.

## Holidays & Working Hours

Having a holiday? Allocate the holiday and enter time right away. See it reflected in your timesheet and in Schedule.

## Day, Week or Month View

Enter time from a day, week or month view. No matter what, the platform helps you make sure you add enough and suggests how much you should add based on the previous learnings.

## Team Timesheets

Monitor your team's timesheets and make sure everyone registers time. Easily notify if anything is missing.

## Time Suggestions (AI)

Make it easy to register time with a little help from our AI. The AI learns from your past entries and with just one click you can add the time to the task.

## Suggested Tasks (AI)

Want to log time on a specific task but don't see it on your timesheet? The friendly AI suggests the tasks that you are assigned to, recently have worked on, or have a deadline soon.

## Task Time Entries

Make time entries directly on a task. Either when finishing the subtask, marking it as done, or moving it in the workflow.

## Project Time Entries

Log time on a project level.

## Lock Time (soon to be released)

Ensure no one registers time on a given task or project by locking the time.

## Timer

Start, stop or pause the timer and add time directly from the top menu.

## Prompt for Time Registrations

One of your team members forgetting to register time? Notify them with the missing entries directly in-app either automatically or manually.

## 4.2 Time Management



### Indicators

See indicators when too much time has been registered on a specific task according to the forecast.

### Add a Note

Add notes to your time entries to better remember what you worked on and help the management see what you did.

### Time Entries for Actual Insights into Profitability

Use time entries to get insights into the actual progression of the project. See them reflected real-time in the budget and reports, so you can benefit from having the data right for monitoring the project and ensuring you stay on track.

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[Intelligence Features](#)

## 5.1 Intelligence



### Real-Time Reports

Get access to aggregated data from your entire portfolio of projects. Customize the reports and benefit from a dashboard view into your KPIs. Share them with internal or external users.

### See the Past, the Present & the Future

See the predicted future in every report and tie it with insights into the actuals. The customizable reports in Forecast enables you with the view you need and the ability to report to every stakeholder in an instant.

### Company Financials

Financial Portfolio Report presents all the financial numbers needed for running a project-based company. See how each project affects the overall business cost, profit, revenue, and margin. Filter and use the eye icon to check the needed numbers - either for the chosen period or totals. Like with the rest of the platform, you can see the high-level overview and drill down to the smallest detail. Export the reports in the view you prefer.

### Download & Share Reports

Download and share the reports you've compiled. Share the reports and protect them with a password, so the insights stay safe.

### Estimates vs. Actuals

See how your planned projects and tasks are progressing with insights into the actuals. Compare, measure, and monitor how they are evolving according to your plan or based on time entries and status of the task. The estimates and actuals are automatically calculated for you, and shown real-time. Thereby you always have the data at hand when needed.

### Budget

Keep the budget in sight by having every KPI turned into a part of a visual budget graph. The budget provides your with a holistic overview, where you are able to drill down and get the needed insights. This enables a stronger grab on the project financials, so you can avoid scope creep and run more profitable projects.

### Scope Change

Monitor scope change on a portfolio level in real time. Monitor the status of each project, and collaborate around making them more successful and predictable.

### Resource Utilization

See the level of utilization across teams or the entire company. Measure and monitor so you ensure your team is fully utilized with the right tasks and you increase your billability.

### Resource Reports

Want to know how each employee and team is performing, the level of utilization, or the number of tasks they've completed or simply the billability? Benefit from customizable reports, where you can tailor the view and share them with stakeholders when needed.

### Project Portfolio List

See the entire list of projects, the status, and how they are progressing.

## 5.2 Intelligence



### Sprint/Project Progress

Working in sprints you need to know the running pace, burndown and get the insights into how you are performing. Easily customize a report so you can, in an instant, brief on the KPIs.

### Running an Agile Business

Make sure your agile approach is paying off by creating your dashboard and report to measure the KPIs on. See the Sprint burndown, the overall velocity, and much more. Everything can be customized, so you get the view you prefer.

### Client Report

Report on clients, see the entire portfolio of projects related to a specific client. See time spent on each together with client requests and changes.

### Key Performance Indicators

Measure success, profitability, cost, profit and revenue with ease. Set up your reports, filter out unnecessary details, and show the information you need. The reports are real-time and provide you with insights into every detail of your project portfolio. See overall Velocity, Resource utilization, Task list, Billable/non-billable time and much more.

### Expense Reporting

Create and report expenses. Keep track of internal and external costs.

### Share, Download, & Protect the Reports

Easily share reports directly from the page. Define and customize the elements of the report and make sure stakeholders are fully informed. The reports can also be downloaded as necessary.

Next  
[Financial Features](#)

## 6.1 Financials



### Open API

Built on an open API, Forecast allows tech savvy companies to add needed components to the platform. It comes very handy with pre-built integrations and several opportunities for strong collaboration.

### Project & Portfolio Expenses

Follow and add expenses to the project. Make sure you get paid for them and invoice them.

### Time & Material

In Forecast, you can run a project based on time and material. Easily see it in the budget, follow the planned vs the actuals and make sure you don't burn money. Invoice on the go and make sure you see what have or haven't been paid.

### Deposit

When getting some of the money in the beginning of the project, see it clearly in the graph and monitor how it affects the overall financials in the reports.

### Fixed Price

Give your clients a stronger fixed price based on the knowledge you have and the transparency into what the project is actually costing you. Easily set the fixed prices, see the markup, and look at how it affects each rate card.

### Retainers

Working in retainers, you need to see the amount of tasks and hours you've spent on the given period. With a Retainer project in Forecast, you can easily measure the amount of hours burned, the task completed and in case you worked too much or too little, you can either subtract or roll over tasks and hours.

### Manual Input

Manually create an invoice based on the things you need to get paid for. Integrate with your favourite accounting system.

### AI Time Estimates

AI helps you, based on learnings from past time entries and precious projects, predict how long the task will take and thereby gives you a more precise timeline.

### Rate cards

Use Rate cards to see what you are selling each role for. The rate card is used for calculating the price of a task, and in the budget to count the actual profit based on the salary and expenses.

### Internal Cost (Salary)

See how the salary you are paying your team affects your overall profit. The Internal hourly cost is subtracted from the rate card and by that you get a precise price on the task and projects.

## 6.2 Financials



### Expenses

Having expenses related to the project? Have people upload them to the project and controllers and admins approve them before it's reflected in the budget.

### Invoicing

Make sure you get paid for what you do by using the invoicing module. By creating your invoices in Forecast, you can then spot how much has been paid and invoiced and see how it affects your project budget. Integrate with your accounting system.

### Non-billable - Billable

All billable elements are imported directly into your invoice for easy sharing.

### Prediction

We help you predict and estimate the future. Use the scoped out project and see how the project affects the project pipeline, your team's utilization and your overall profitability.

### Actuals

Get to know how it's actually going based on data you and your team are delivering. Get the holistic view of the actuals and drill down to understand where the numbers come from. Use the budget to steer the company and project in the right direction by comparing planned and actuals.

### Internal projects

Run internal projects and see clearly how it affects your business profitability.

### Project Portfolio report

See the entire portfolio of projects in one single view. View it from a financial or hours spend perspective. Disassemble the numbers to get access to every detail. Monitor expenses on different levels and be sure no problems arise again.

### Currencies

Select multiple currencies for your projects and Rate cards, so you can invoice based on the currency you sell your projects at.

Next  
[Automation Features](#)



## 7.1 Automation

*Powered by Artificial Intelligence (AI) and Machine Learning, Forecast automatically learns from your data and helps you better understand where to improve.*



### Repeating Tasks

Having repeating tasks regularly? Mark the task as recurring and see it reflected in your team's Schedule.

### Suggested Labels

Be better at classifying your task and projects to further use it for stronger insights with the help of AI.

### AI Time Estimates

AI helps you, based on the learnings from time entries and precious projects, predict how long the task will take and thereby gives you a more precise timeline.

### Suggested Tasks

Be notified with the tasks you need to work on now, for example, if the deadline is approaching or simply based on recent activity.

### AI Suggestions for Time Entries

Register time fast with the help of AI. Taking into account your previous activities and tasks in progress, AI suggests where you should log time.

### Auto Schedule

Auto Schedule helps you be more efficient when scheduling the project, tasks and employees, so you know how fast you can deliver the project while also looking into your team's schedule.

### Suggested Roles

Choose the right roles for the task and the project instantly, so you get a better planned price of the task, milestones, and the project overall. Use it for presenting to clients and have transparency into what you are actually earning.

Next  
Compliance Features

## 8.1 Compliance



### Penetration Testing

Built and tested by an entire team of skilled developers, Forecast is bullet proof. The penetration test helps to identify any security issues that might be in the system. A third party company, with professional penetration testers, tests the app to ensure that it is done correctly.

### GDPR Compliant

We take your data very seriously and are, of course, GDPR compliant.

### SLA

Making sure you never discover down time.

### Single Sign On

Take security to the next level by enabling SSO, so you can log in to all your systems with one set of Credentials.

### Security

We exclusively use SSL encryption for secure access and EU Safe Harbor Compliance so your data is safe and secure.

### Admin Controls

Administrators can manage team members, enable SSO and integrations, and modify the team's account.

### Apps & Integrations

Connect with all the tools and cloud services you already use by linking them directly with your Projects.

### Open API

Built on an open API, Forecast allows tech savvy companies add needed components to Forecast. Forecast comes very handy with pre-built integrations and several opportunities for strong collaboration.

### Client Database

Have transparency into all your clients, add notes, client users and see how each is adding to your profitability in the business.

### Shortcuts

Shortcuts help you be faster and better in Forecast. See an overview of the amazing shortcuts in the help center article.

Next  
[Integration Features](#)

## 9.1 Integrations

*Enable collaboration across teams and departments with pre-built integrations to your other business tools.*



### Project Management

Coming from Asana or Trello, you can easily import your past projects. Connect your departments with the Jira & Forecast integration for easy collaboration and transparency you have never seen before.

### Productivity

Communicate, collaborate, and celebrate the creation of your project with integrations to Apple Mail, Google Calendar, Google Drive, Outlook, and Slack.

### Easy Integrations with the Tools

Use Zapier integration for those solutions that need an extra set of automation and optimization of the workflows.

### Sales

Connect your pipeline with Forecast and enable projects directly from Salesforce to Forecast, to always be on top of the planned projects and future pipeline.

### Finance

Connect your accounting system and get paid for what you do with Xero, e-conomic, QuickBooks or TimeLog.

### Developer Tools

Let the tasks flow from one system to another by integrating Azure devOps, Github or GitLab.

### Business Intelligence

Connect stakeholders and make sure you present the breakdown as preferred with MS Excel or Report.

### Mobile Apps

Access Forecast directly from your iPhone or Android. The app is made for faster timer entries and task creation on the go.

### Time Tracking

Log time and integrate Harvest or TimeLog to keep the flows. Discover the benefit of having everything in one solution.

### Security & SSO

Monitor permissions levels across the company and enable easy login with Azure Active Directory, Okta or OneLogin.

