

Forecast PSA Platform

# Full Features List

Forecast offers everything you and your team needs to complete any project successfully. An all in one coherent and straightforward solution.



# Know Your Projects

Knowing what you need to work on and what needs to be prepared requires a high-level overview. It's much easier with a flexible tool that is adaptive to the way your company operates. How do you optimize the project or team? How are the financial numbers looking? When to start the next project? With Forecast features, Project Managers have the answers to streamline their projects.

## Tasks

Easily create tasks, for yourself or assign to multiple team members.

## Subtasks

Successful work management involves splitting larger tasks into smaller subtasks.

## Kanban Board

The modern way to manage work by dragging tasks into “done” columns.

## Workflow

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

## Dependencies

Organize your workflow by creating tasks with either a ‘Prerequisite’ or a ‘Dependent.’ See the dependencies reflected in task modal and workflow.

## Forecast Estimation

AI driven estimates learn from the way you work and automatically help you improve.

## Gantt Chart / Timeline

The ultimate bird's eye view of your work, allowing you to quickly adjust your plans in a calendar view.

## Rates

Create and use rate cards to track the cost of each project role.

## Clients

Store all your contacts and leads to maintain a healthy relationship with your customers.

## Milestones

Group lists of tasks and set a goal by a certain date, give your team and clients something to look forward to.

## Issue Management

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



## Know Your Projects

### **Blocking**

Block a task to let everyone know that it's not progressing right now.

### **Repeating Tasks**

Choose the frequency and number of repetitions for recurring tasks.

### **Time Tracking**

Report time manually or with the built-in timer. See insights with time registration data for individuals or projects.

### **Project Templates**

Quickly duplicate projects and save countless hours creating the same project over and over.

### **Connected Projects**

Plan across multiple projects with a shared workflow. Have connected sprint planning and plan your roadmap with a more holistic perspective.

### **Deadlines**

The ultimate bird's eye view of your work, allowing you to quickly adjust your plans in a calendar view.

### **Budget**

Create and track budgets for Fixed price, Time and Material, and non-billable projects in terms of money and time.

### **Project Status**

Easily update the project status so everyone is aligned on where the project stands, what's blocking and when you can deliver.

### **Sprint**

Easily plan your sprints and make sure you deliver in a stepwise fashion.

### **Custom Reports**

Easily build your own reports using drag-drop with more than 50+ customizable components. No coding required!



## Know Your Projects

### **Standard Reports**

You can track budgets, burndowns, progress, velocity, utilization, estimates vs. actuals etc., using our pre-built reports.

### **Insights**

Business level insights can help you track client profitability, project roadmaps, utilization, etc.

### **Sharing Reports**

Securely share your custom reports with clients and other stakeholders without giving them login access.

### **Dashboards**

Put your data to work by creating a custom view that can be shown on a large screen in the office.

### **Labels**

Label anything, ie. projects, people, or tasks. This helps you locate and match people to the right work.

### **Comments**

Tired of email threads? Comment directly on a task, to clarify exactly what needs to be done.

### **Expense Reporting**

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

### **Indicators**

Indicators alerts for warnings and critical things going on in the project, such as more time registered than forecasted, dates and deadlines, bugs etc.

### **Files**

A simple file and folder system allows you to store and organize all of your project files in one place.



# Know Your Schedule

Having your schedule connected to your projects is possible with Forecast. Have the visibility of all your resources and upcoming projects in one platform. Is the team fully utilized? What tasks have not been assigned? Which project needs more resources? Do we have enough resources or should we expand the team to get this new client? With Forecast features, Resource Managers have the answers!

## Rates

Create and use rate cards to track the cost of each project role.

## Scheduling

Resource planning using graphical and intuitive drag-drop, so you make sure that people are booked accordingly.

## Task Allocation

Work directly with tasks without having to allocate your team first. Allocations are automated and show the forecasted hours on the project to which a person is assigned.

## Project Allocation

Work on a project level by manually allocating persons to fit the needs of the project. Project allocations show the allocation total and hours per day.

## Holidays

Schedule holidays and time off and see the dates directly in Scheduling.

## Dependencies

Organize your workflow by creating tasks with either a 'Prerequisite' or a 'Dependent.' See the dependencies reflected in task modal and workflow.

## Non-Project Time

Track non-project time for internal projects or non-billable time. People distribution utilization of non-project time is represented in Scheduling.

## Unassigned Tasks

Have all of your unassigned tasks in one view. See what role and how many hours are required to finish a task. Simply drag and drop the unassigned task to the available person.

## Custom Reports

Easily build your own reports using drag-drop with more than 50+ customizable components. No coding required!



## Know Your Schedule

### Standard Reports

You can track budgets, burndowns, progress, velocity, utilization, estimates vs. actuals etc., using our pre-built reports.

### Insights

Business level insights can help you track client profitability, project roadmaps, utilization, etc.

### Sharing Reports

Securely share your custom reports with clients and other stakeholders without giving them login access.

### Assigned Subtasks [Coming soon]

Schedule your assigned team member to a smaller portion of the task with subtask allocations.

### Resource Heatmap

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



# Know Your Work

Eliminate double work on a project by knowing who is working on what. What should I work on today? What's my deadline? With whom should I collaborate? What are my current and upcoming tasks? Where should I register time? Get paid for the work you do. With Forecast, teams have effective collaboration on projects and are aligned both on the big picture and on their immediate tasks.

## Tasks

Easily create tasks, for yourself or assign to multiple team members.

## Subtasks

Successful work management involves splitting larger tasks into smaller subtasks.

## To do's

Use to-do's to keep things simple and have everything located on your task.

## Upcoming Work

Stay on top of your assigned tasks and make sure you know what to work on next.

## Kanban Board

The modern way to manage work by dragging tasks into "done" columns.

## Comments

Tired of email threads? Comment directly on a task, to clarify exactly what needs to be done.

## Time Tracking

Report time manually or with the built-in timer. See insights with time registration data for individuals or projects.

## Add a Note

Comment on time entries to share some extra information related to the logged hours.

## Files

A simple file and folder system allows you to store and organize all of your project files in one place.



## Know Your Work

### Non-Project Time

Track non-project time for internal projects or non-billable time. Peoples distribution utilization of non-project time is represented in Scheduling.

### Indicators

Indicators alerts for warnings and critical things going on in the project, such as more time registered than forecasted, dates and deadlines, bugs etc.

### Filtering

Filter on specific components to help you quickly find the information you are searching for and to customize your view. You can filter on Scoping, Sprints, Workflow, and Scheduling and much more.

### Attachments

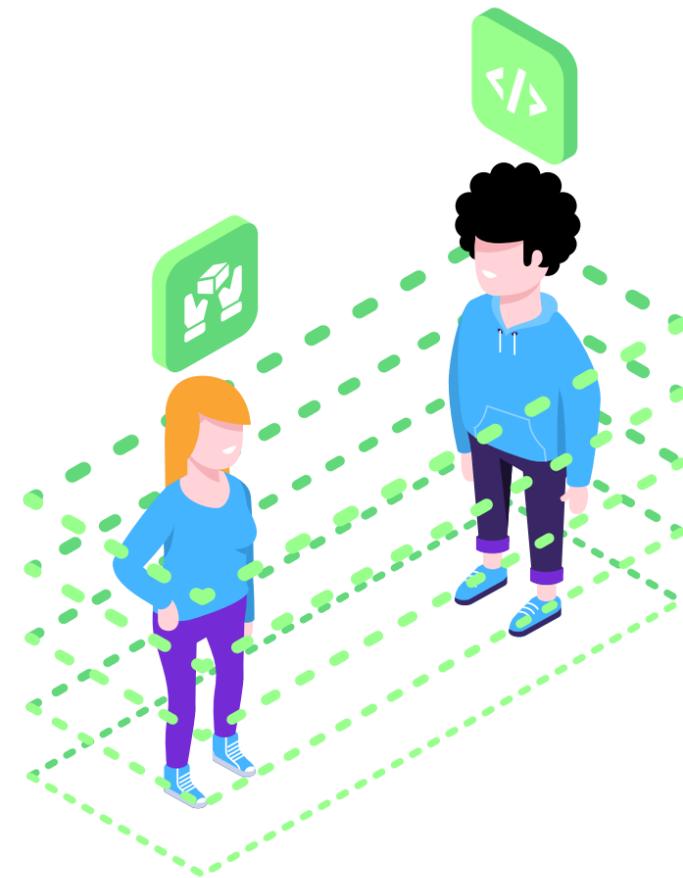
Add files from your computer or Google Drive to any task or project.

### Sprints

Easily plan your sprints and make sure you deliver in a stepwise fashion.

### Labels

Label anything, ie. projects, people, or tasks. This helps you locate and match people to the right work.



# Know Your Tech

Forecast has all the features you need to manage successful projects and teams. It is flexible and customizable to adapt with you and your projects needs. We've also got the tech to back you and your data up.

## Shortcuts

Power users can take advantage of hot keys to quickly accomplish things like assigning, blocking tasks, etc.

## Permissions

Choose access rights and permissions so only certain people can see what they need to - and nothing more.

## Single Sign-on (SSO)

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

## Admin Controls

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

## Security

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

## Apps & Integrations

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

## Powered by AI

Our Artificial Intelligence (AI) and Machine Learning engine automatically learns from your data and helps you better understand where to improve.

## GDPR Compliant

We are GDPR compliant and follow data processing compliance.

## API

Our API is a complete programmable interface for all Forecast functionalities.

## Penetration Testing

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.





## For more information

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