

# Introducing Project Management for Creatio



**A native way to plan, track, and deliver projects with clarity**

Your Creatio system now extends beyond CRM with a built-in solution to manage projects end-to-end. Project Management for Creatio helps you stay in control of project planning and execution by keeping timelines, tasks, resources, and costs aligned as work progresses. It simplifies how projects are structured into milestones and tasks, tracked through timesheets, and monitored through real-time dashboards—so teams stay coordinated, progress remains visible, and projects move forward with clarity, accountability, and financial control.



**Organize Projects, Tasks, and Milestones**

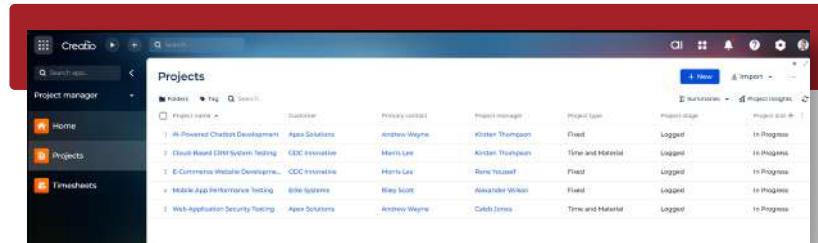
**See Progress as Work Happens**

**Maintain Visibility Across Delivery and Billing**

# Project Visibility from Planning to Delivery

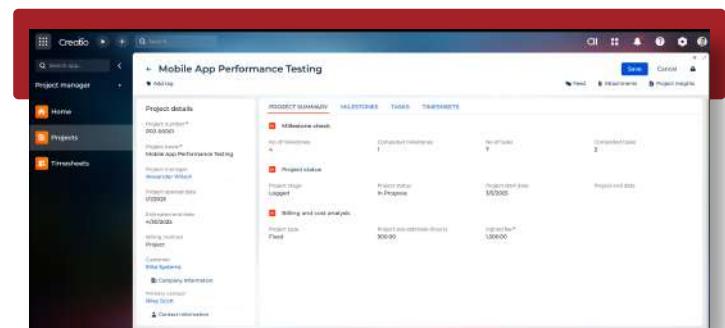
## Organize and Track All Projects in One View

View all projects in a single list and use tags to group, label, and quickly find what matters. Track total projects, upcoming work, projects in progress, and completed projects—making it easy to understand workload, prioritize effectively, and stay on top of project status at any time.

A screenshot of the Credio software interface. The left sidebar is titled 'Project manager' with options for Home, Projects, and Timesheets. The main area is titled 'Projects' and shows a list of six projects: 'AI-Powered Chatbot Development' (Status: In Progress), 'Cloud-Based CRM System Testing' (Status: In Progress), 'E-Commerce Website Development' (Status: In Progress), 'Mobile App Performance Testing' (Status: In Progress), 'Web Application Security Testing' (Status: In Progress), and 'AI-Powered Chatbot Development' (Status: In Progress). Each project row includes columns for Project name, Customer, Primary contact, Project manager, Project type, Project stage, and Status.

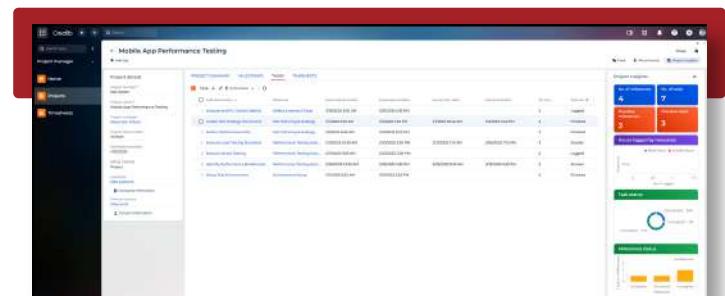
## Set Up Your Project in One Place

Define timelines, milestones, tasks, resources, and financial details in one place—so everything is structured before execution begins. Keep project ownership, scope, and planning aligned from the start, reducing rework as execution moves forward.

A screenshot of the Credio software interface. The left sidebar is titled 'Project manager' with options for Home, Projects, and Timesheets. The main area is titled 'Mobile App Performance Testing' and shows the 'Project details' section. It includes tabs for 'Project summary', 'Milestones', 'Tasks', and 'Timesheets'. Under 'Project summary', there are sections for 'Project overview' (with a progress bar at 40%), 'Milestones' (4 total, with one in progress), 'Project status' (In Progress), 'Project tasks' (1 total, In Progress), and 'Billing and cost analysis' (Total billable hours: 300.00, Total billable cost: 1300.00).

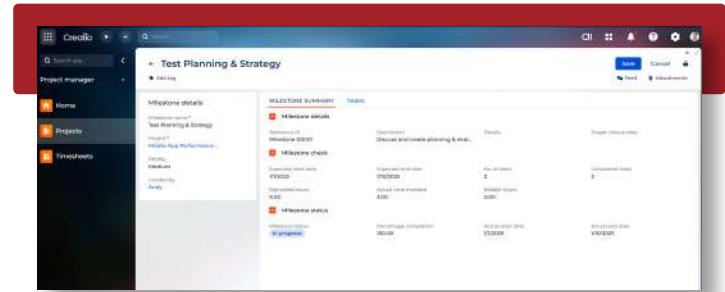
## Gain Deeper Project Visibility

Bring task progress and timesheet data together to understand how work is trending. Spot patterns early and make informed decisions as the project moves forward. Use real data to identify delays, workload imbalances, or efficiency gaps before they impact delivery.

A screenshot of the Credio software interface. The left sidebar is titled 'Project manager' with options for Home, Projects, and Timesheets. The main area is titled 'Mobile App Performance Testing' and shows the 'Project details' section. It includes tabs for 'Project summary', 'Milestones', 'Tasks', and 'Timesheets'. Under 'Project summary', there are sections for 'Project overview' (with a progress bar at 40%), 'Milestones' (4 total, with one in progress), 'Project status' (In Progress), 'Project tasks' (1 total, In Progress), and 'Billing and cost analysis' (Total billable hours: 300.00, Total billable cost: 1300.00). The 'Tasks' tab is active, showing a table of tasks with columns for Task name, Description, Status, and Progress.

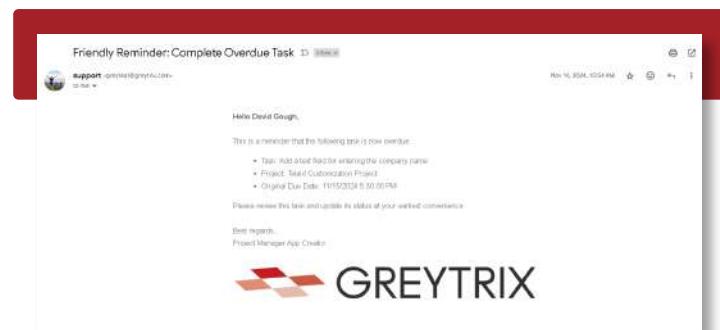
## Track Progress Across Milestones

Monitor each project phase through milestones. Quickly view task completion, billable hours, and progress percentages for better phase-level visibility. This helps ensure each phase stays aligned with timelines and delivery expectations.

A screenshot of the Credio software interface. The left sidebar is titled 'Project manager' with options for Home, Projects, and Timesheets. The main area is titled 'Test Planning & Strategy' and shows the 'Milestones' section. It includes tabs for 'Milestones details', 'Milestones summary', and 'Tasks'. Under 'Milestones details', there are sections for 'Project ID' (Mobile App Performance Testing), 'Project name' (Mobile App Performance Testing), 'Milestone ID' (Milestone 00001), 'Milestone name' (Test Planning & Strategy), 'Planned start date' (2023-01-01), 'Planned end date' (2023-01-05), 'Actual start date' (2023-01-01), 'Actual end date' (2023-01-05), 'Actual duration' (4 days), 'Actual hours' (8.00), and 'Actual cost' (80.00). The 'Milestones summary' tab is active, showing a table of milestones with columns for Milestone ID, Milestone name, Status, and Progress.

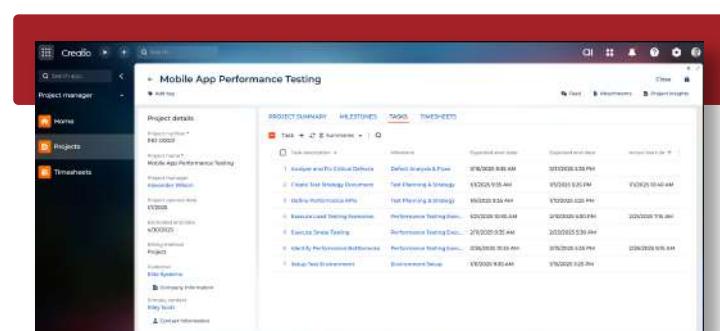
## Keep Projects Aligned with Workflow Controls

Automatically detect overdue projects and tasks and trigger email notifications when action is required. Project workflows pause until pending work is completed—ensuring issues are addressed on time and projects move forward only when critical tasks are resolved.



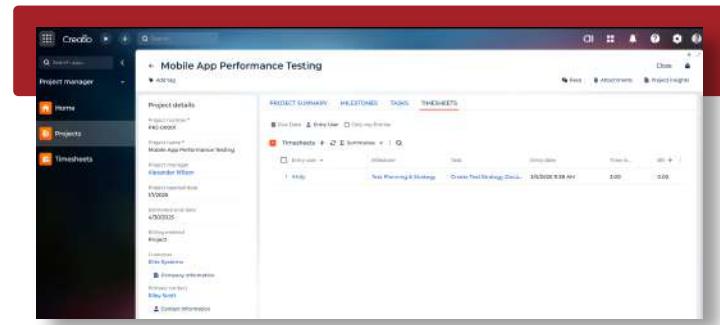
## Keep Full Visibility on Tasks

View all project tasks in a single list with due dates, status, ownership, and effort details. Easily track what's completed, in progress, or pending. Clear task-level visibility helps maintain accountability and smooth day-to-day execution.



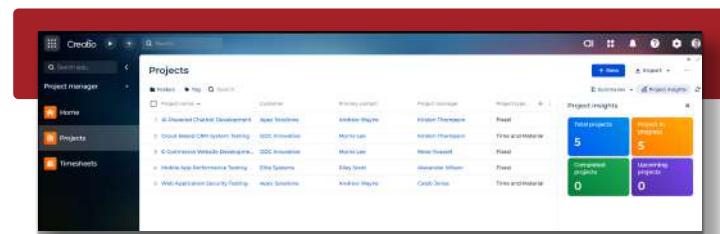
## Track Time with Clarity

Review all time logged against your project in calendar or list view. Maintain accurate visibility into efforts to support reporting and billing. This ensures time tracking remains transparent, consistent, and directly connected to project outcomes.



## Get Instant Project Insights:

View clear project activity through visual and numerical insights. Quickly see total projects, upcoming work, projects in progress, and completed projects—so you always know what's active, what's next, and what's done.





## Review Overall Project Health

See key project details in one place, including milestone and task progress, project timelines, and billing and cost information—helping assess whether work is on track or needs attention.

## Get a Complete View of Project Health

See milestone and task progress, project timelines, and overall status in one view. Track completion percentages and monitor allocated, billed, and unbilled effort to keep delivery and costs aligned.

## Stay on Top of Daily Project Activity

Get an at-a-glance view of ongoing projects, active tasks, and overdue work from a single workspace. Quickly understand current workload, prioritize critical tasks, and navigate to key project areas while staying updated on what needs attention.

## Track Progress at the Milestone Level

View milestone progress at a glance with visibility into completed tasks, billable hours, and progress percentages. Drill into milestone-specific tasks to track deliverables and manage dependencies with ease.

## Create and Manage Tasks with Detail

Create tasks within a project and capture both basic information and detailed specifications in a structured view. Link tasks directly to timesheets, track activity through the feed, and manage task updates easily—keeping execution organized and connected.

## Log Time Accurately Against Project Work

Record time spent against specific projects, milestones, and tasks while clearly tracking billed and unbilled hours. Add notes as needed to maintain accurate effort tracking and support reliable billing and reporting.



## Manage Projects with Clarity at Every Step

**Plan → Assign → Track → Review → Deliver**

*With clear structure across planning and delivery, Project Management for Creatio helps projects progress with consistency and confidence—reducing manual follow-ups, keeping work aligned to timelines and costs, and ensuring delivery stays predictable from start to finish.*

### About Greytrix

#### 25 Years of ERP Excellence

Trusted by **5000+ businesses across the globe**, Greytrix specializes in cloud integrations that simplify complex operations.



Our GUMU™ framework powers seamless connectivity between leading **CRMs and ERPs — from Salesforce to Sage 100**.

With 25 years of expertise and **30+ certified consultants**, we help businesses **work smarter, integrate faster, & grow stronger**.

 [creatio@greytrix.com](mailto:creatio@greytrix.com)

 +1 888 221 6661

 Greytrix | GUMU™