

# 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**

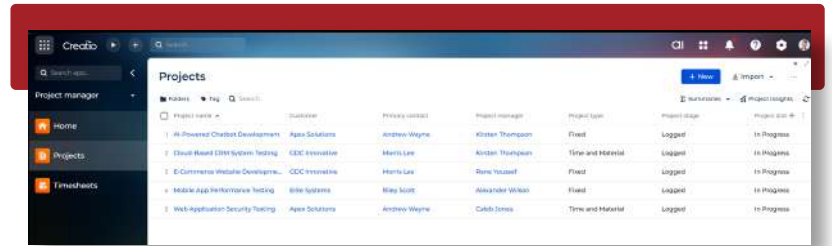


**Maintain Visibility  
Across Delivery and Billing**

# Project Visibility from Planning to Delivery

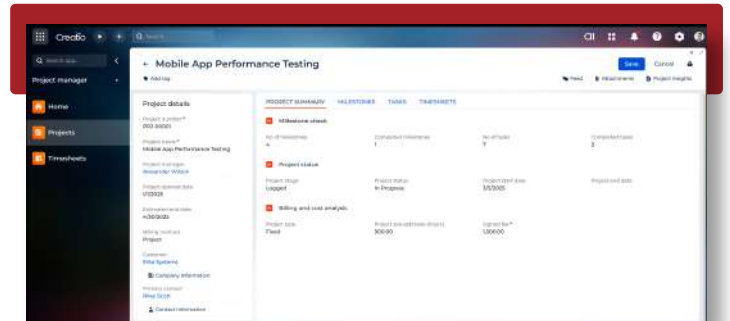
## Organize and Track All Projects in One View

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.



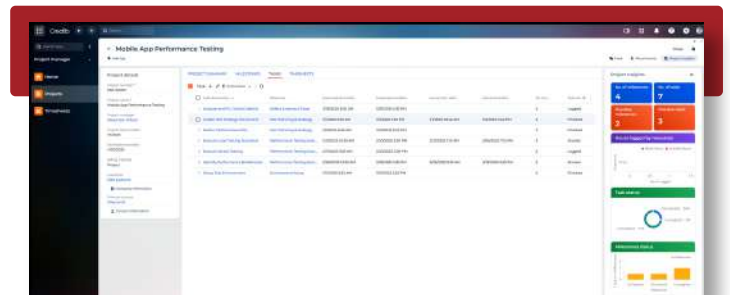
## Set Up Your Project in One Place

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.



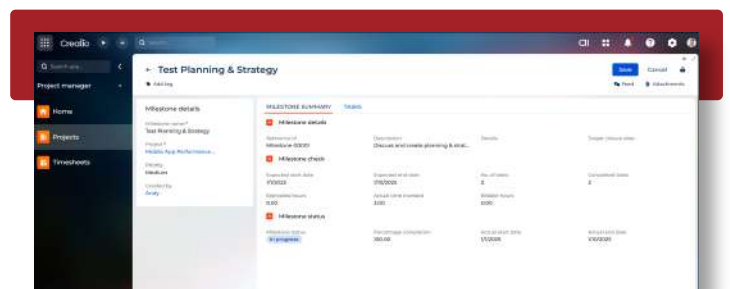
## Gain Deeper Project Visibility

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.



## 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.



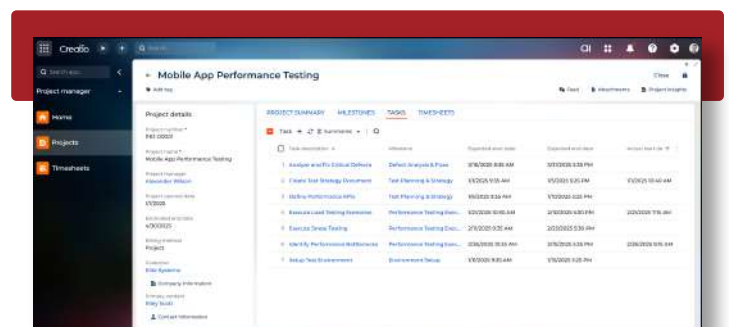
## Keep Projects Aligned with Workflow Controls

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.



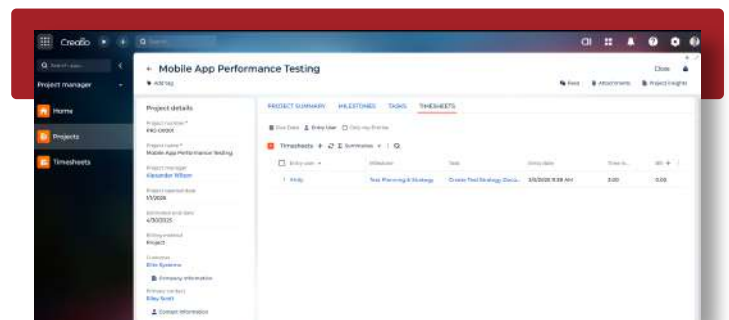
## Keep Full Visibility on Tasks

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.



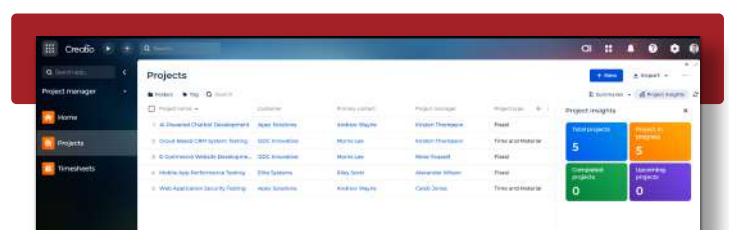
## Track Time with Clarity

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.**



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