



# 2020 Insight

## Project Task Management

Efficiently managing tasks is one of the decisive factors that determine the success or failure of projects. This is especially true when managing a high volume of projects and/or complex, large-scale projects. Professional project software allows companies to successfully manage projects without spending a great deal of time on administrative tasks.

Our 2020 Insight Project Task Management module is the right solution for the efficient and simple creation and maintenance of project plans. Companies whose core business is project-based will discover that this module enables the management of large and

small projects using proven project management methodologies. In addition to managing your customer projects, it also allows you to successfully manage internal projects.

### Benefits

Save time when planning and managing projects

See all aspects of the project throughout its lifecycle

Streamline project quoting, production and invoicing

Identify project challenges at an early stage so they can be addressed in a timely manner

Provide information to both partners and customers to ensure higher partner and customer satisfaction

Increase productivity when used with internal projects as well

# Maximize visibility and save time managing projects

The 2020 Insight Project Task Management module helps you plan your projects professionally and efficiently, tracking progress and identifying variances with just a glance. Thanks to its ease of use and clear visualization, you can use your valuable time for effective management and corrective activities instead of administrative tasks.

## Create & Update Project Plans

Creating and updating project plans takes a lot of time and is essential for managing projects. Create complex project plans with little effort using the 2020 Insight project management module. Save your project managers' time with software-supported functionalities for updating their projects. Updating project tasks is also easier for all project participants as no additional application needs to be launched. Updating tasks is quickly integrated as routine in the daily business of all departments, so that even project subtasks are always up to date.

## Gantt Chart Visualizations

Clear visualizations help to quickly detect deviations and identify bottlenecks. Work with the appealing visualizations of the easy-to-use Gantt chart view and always keep track of your projects.

## Projects Module (Required for Project Task Management)

Ideal for multi-family, architectural millwork and store fixture/shop-fitter business models, the Projects module allows you to combine multiple quotes, sales orders, production orders and invoices within one project. You can create project-specific product feature sets, display history of project status changes and view project-related file attachments and notes, thus making it possible to manage the project and coordinate activities.

With the Projects module you can easily generate project cost summaries and required materials. Sales orders, partial deliveries and partial invoices can also be processed according to the specific project, based on the customer's requirements.

## Process Automations Based On Project Task Status

Using the integration of the project management module as part of the 2020 Insight ERP system, you can link sales orders, purchase orders and production orders with status changes for the project tasks to automate business processes. This ensures that project tasks in the project plan are always up to date. When project changes occur, you automatically provide all departments the updated information so that they can optimize their resources.

## 2020 Insight User Interface

The project management module makes use of the user-friendly 2020 Insight user interface. Your employees from different departments can work much more effectively in their familiar 2020 Insight environment.

### Requirements for Implementation

- 2020 Insight version 12.02 or higher
- SQL 2017

### Ordering Information

IS.SOM.COR	Sales Order Management
IS.SOM.PRJ	Projects
IS.SOM.PTM	Project task management