

WORK MANAGEMENT	OBX STARTER		OBX		RCO		PSX
Tasks	✓		✓		✓		✓
Boards	✓		✓		✓		✓
Checklists	✓		✓		✓		✓
Subtasks	✓		✓		✓		✓
Multiple Task Contributors	✓		✓		✓		✓
Contact Task Contributors	✓		✓		✓		✓
Task Dependencies	✓		✓		✓		✓
Repeat Tasks	✓		✓		✓		✓
Time Tracking	✓		✓		✓		✓
My Task View	✓		✓		✓		✓
Custom Task & Board View	✓		✓		✓		✓
PROJECT MANAGEMENT							
Board View (Kanban)	✓		✓		✓		✓
Plan View (Gantt)	✓		✓		✓		✓
Table View	✓		✓		✓		✓
Board Hierarchy	—		✓		✓		✓
Board Stages	—		✓		✓		✓
Baseline	—		✓		✓		✓
Projects & Phases	—		—		✓		✓
Project Milestones	—		—		✓		✓
COLLABORATION							
Integrated with Chatter	✓		✓		✓		✓
File Sharing	✓		✓		✓		✓
Notifications	✓		✓		✓		✓
CUSTOMER & PARTNER COLLABORATION							
Customer & Partner External Sharing	✓		✓		✓		✓
Customer & Partner Collaboration	—		✓		✓		✓
TEMPLATES & AUTOMATION							
Board Types	1		✓		✓		✓
Board Templates	1		✓		✓		✓
Advanced Task Templates	—		✓		✓		✓
Advanced Template Import Automation	—		✓		✓		✓
Oppurtunity Product Templates	—		✓		✓		✓
Role Assignment	✓		✓		✓		✓
Account / Oppurtunity Role Assignment	—				✓		✓
Customer Role Assignment	—				✓		✓

1 - limited

RESOURCE MANAGEMENT					
Resource & Capacity Timeline	—	—	✓	✓	✓
Time-Off Visibility	—	—	✓	✓	✓
Resource Scheduling	—	—	✓	✓	✓
Resource Request & Assignment	—	—	✓	✓	✓
Capacity Management	—	—	✓	✓	✓
Availability Forecasting	—	—	✓	✓	✓
Role-Based Resourcing	—	—	✓	✓	✓
Skills-Based Resourcing	—	—	✓	✓	✓
Flexible Working Days/Hours	—	—	✓	✓	✓
HOLIDAY & TIME-OFF					
Resource & Capacity Timeline	—	—	✓	✓	✓
Time-Off Visibility	—	—	✓	✓	✓
TIMESHEETS & APPROVAL					
Timesheets	—	—	—	✓	✓
Timesheet Approval	—	—	—	✓	✓
Timesheet on Mobile App	—	—	—	✓	✓

EXPENSES & APPROVALS	OBX STARTER		OBX		RCO		PSX
Expense Management	—		—		—		✓
Expense on Mobile App	—		—		—		✓
PROJECT ACCOUNTING							
Budget Tracking	—		—		—		✓
Project Margins	—		—		—		✓
Resource Costs & Rates	—		—		—		✓
Rate Cards (Cost & Bill Rates)	—		—		—		✓
Revenue Forecasting & Recognition	—		—		—		✓
Multicurrency	—		—		—		✓
REPORTS & ANALYTICS							
20+ Standard Reports	✓		✓		✓		✓
60+ Standard Reports	—		—		✓		✓
Custom reports related to Salesforce CRM	✓		✓		✓		✓
Scheduled Reports to Email	✓		✓		✓		✓
Dashboards	✓		✓		✓		✓
Historical Trend Reports	✓		✓		✓		✓
Einstein Analytics*	—		✓		✓		✓

* - additional cost

CONFIGURE & AUTOMATE							
Salesforce Lightning Native	✓		✓		✓		✓
Custom Fields	✓		✓		✓		✓
Workflow Rules	✓		✓		✓		✓
Process Builder	✓		✓		✓		✓
Approval Processes	✓		✓		✓		✓
APIs	✓		✓		✓		✓
List Views	✓		✓		✓		✓
Page Layouts & Page Builder	✓		✓		✓		✓
Flow	✓		✓		✓		✓
SECURITY & COMPLIANCE							
User Access Profiles / Permission	✓		✓		✓		✓
Record Level Security	✓		✓		✓		✓
Field Level Security	✓		✓		✓		✓
Platform Licences (OEM)*	—		✓		✓		✓
Single-Sign-On	✓		✓		✓		✓
ISO 27001 Certified	✓		✓		✓		✓
Salesforce Platform	✓		✓		✓		✓

* - additional cost

CUSTOMER SUCCESS							
Community Support [Coming Soon]	✓		✓		✓		✓
Knowledge Base	✓		✓		✓		✓
Training Webinars	✓		✓		✓		✓
Email Support	✓		✓		✓		✓
Phone Support*	—		✓		✓		✓
Assigned Customer Success Manager	—		✓		✓		✓
Implementation Assistance, Onboarding, Training	—		✓		✓		✓
Implementation Services*	✓		✓		✓		✓

* - additional cost

WORK MANAGEMENT	
Tasks	Breakdown a project or process & assign work to your teams
Boards	Boards are team workspaces with team members, tasks & Chatter
Checklists	Track to-dos against your tasks
Subtasks	Breakdown large tasks into subtasks
Multiple Task Contributors	Assign multiple people to tasks
Contact Task Contributors	Assign multiple customers or partners to tasks
Task Dependencies	Link tasks with dependancies for auto scheduling
Repeat Tasks	Set tasks to repeat daily, weekly, monhtly etc.
Time Tracking	Log time against tasks
My Task View	View all your tasks across all Boards
Custom Task & Board View	Organise your work, your team’s work and your portfolio of projects
PROJECT MANAGEMENT	
Board View (Kanban)	Interactive Kanban Board with drag and drop task update
Plan View (Gantt)	Advanced Gantt Chart for planning and scheduling complex projects
Table View	All the tasks shown in an interactive table
Board Hierarchy	Break down large projects into a hierarchy
Board Stages	Track overall project progress and time spent in each stage
Baseline	Snapshot your project timeline to benchmark progress against the original plan
Projects & Phases	Build out Projects and Phases for resource assignment
Project Milestones	Define Project Milestones for percentage completion & billing
COLLABORATION	
Integrated with Chatter	Comment & tag colleagues w/Chatter feeds embedded in Tasks, Boards & Projects
File Sharing	Share files with colleagues or post files to customers with Communities
Notifications	Get notified for tasks, holiday requests and approvals
CUSTOMER & PARTNER COLLABORATION	
Customer & Partner External Sharing	Share Boards with Customers and Partners - no username or password is necessary!
Customer & Partner Collaboration	Collaborate with your customers or partners
TEMPLATES & AUTOMATION	
Board Types	Create Board Types to seperate different processes
Board Templates	Create repeatable process & projects with Board Templates
Advanced Task Templates	Task Templates lets you discretely import a set of Tasks over and over again
Advanced Template Import Automation	Automate template import based on any event in Salesforce or Precursive
Oppurtunity Product Templates	Import task templates based on your opportunity products
Role Assignment	Assign specific tasks or boards to team members with certain roles
Account / Oppurtunity Role Assignment	Synchronize account and opprtunity teams with your board teams
Customer Role Assignment	Automate role absed Task assignment beased on any event in Salesforce or Precursive
RESOURCE MANAGEMENT	
Resource & Capacity Timeline	Dynamic view of your team’s forecast and actual availability and capacity
Time-Off Visibility	Company & national holidays can be defined per region and assingned to individuals
Resource Scheduling	Book resources on to projects & other engagements using Precursive Plan
Resource Request & Assignment	A queue for unassigned requests that can be assigned to the right people
Capacity Management	Precursive Plan provides an overview for teams capacity forecast
Availability Forecasting	Assign requests based on capacity % and available hours
Role-Based Resourcing	Find the right people for the project by searching by roles
Skills-Based Resourcing	Find the right people for the project by searching by skills tags
Flexible Working Days/Hours	Configure individual resources to have their own working schedule
HOLIDAY & TIME-OFF	
Resource & Capacity Timeline	Individuals can track their holiday and request approval for time-off
Time-Off Visibility	Individuals can manage their own holoday allowance
TIMESHEETS & APPROVAL	
Timesheets	Track time spent on projects, phases, activities with comments
Timesheet Approval	Define tyour process for timesheet approval with line or project managers
Timesheet on Mobile App	Log your time and expenses on the go on any device (iPhone, Android)

EXPENSES & APPROVALS	
Expense Management	Track expenses against the project or other non-project expenses
Expense on Mobile App	Submit expenses from the Time & Expense on Mobile App (iPhone, Android)
PROJECT ACCOUNTING	
Budget Tracking	Keep on top of your project’s budget by tracking actual cost and plan to complete
Project Margins	Know when projects are profitable by seeing real-time-margins
Resource Costs & Rates	Define costs and rates for your team to calculate accurate cost and margin
Rate Cards (Cost & Bill Rates)	Define rate cards for customers, regions or other reasons defining the cost of roles
Revenue Forecasting & Recognition	Forecast project cost & revenue using forecast bookings against the project
Multicurrency	Assign multiple currencies for resources, projects and expenses
REPORTS & ANALYTICS	
20+ Standard Reports	Start with over 20 out-of-the-box reports around tasks & boards
60+ Standard Reports	Start with over 60 standard reports around resource & capacity management
Custom reports related to Salesforce CRM	Build out insights using the Salesforce reporting engine and dashboards
Scheduled Reports to Email	Subscribe to reports that are important from staying on top of key decisions
Dashboards	Curate data from reports using charts, tables and metrics
Historical Trend Reports	Trends reporting allows you to track performance over time across KPIs
Einstein Analytics*	Share insight across your business to make better decisions, faster
CONFIGURE & AUTOMATE	
Salesforce Lightning Native	All Precursive Products are Salesforce Lightning Native for smooth setup
Custom Fields	Add customer fields to tailor our products to your business
Workflow Rules	Automate standard processess by creating workflow rules
Process Builder	Automate tasks, emails and workflows based on any action
Approval Processes	Specify steps for approvals to stay on top of your governance
APIs	Powerful web services API (RESP & SOAP) for integrating with Precursive
List Views	Lists help you analyze, organize and prioritize your work
Page Layouts & Page Builder	Customize page layouts and add components to improve productivity
Flow	Advanced Visual Process Automation to automate complex business processess
SECURITY & COMPLIANCE	
User Access Profiles / Permission	Tailor access to Precursive with permissions per user or profile
Record Level Security	Define rules for sharing records with others in your team
Field Level Security	Field-level security settinfs let you restrict users’ access to view & edit specific fields
Platform Licences (OEM)*	OEM licenses allow team members to access Salesforce and Precursive
Single Sign-On	Single Sign-On (SSO) lets users access Salesforce and Precursive with one login
ISO 27001 Certified	Information security management system certified to ISO 27001:2013
Salesforce Platform	Native to Salesforce Lightning with all data secure and kept on Salesforce
CUSTOMER SUCCESS	
Community Support [Coming Soon]	Community for managing your account, support, ideas and community Q&A
Knowledge Base	Learn how to use all aspects of Precursive from the online knowledge base
Training Webinars	Regular training & customer success webinars
Email Support	Email support is available to all customers
Phone Support*	Phone support is available to Premier Support customers
Assigned Customer Success Manager (CSM)	Your Customer Success Manager will work with you to see success faster
Implementation Assistance, Onboarding, Training	Work with our CSMs and Services teams to see success faster
Implementation Services*	Additional Services are available to support you to do more with Precursive