# Overview of Functions

| | light | office | enterprise | projectfacts |
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## TIME TRACKING

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|---|---|:---:|:---:|:---:|:---:|
| **Attendance times (office, home office, mobile)** | Total employee working hours per day (check-in times). | ✓ | ✓ | ✓ | ✓ |
| **Vacation & sickness management** | Submit, review and approve leave request. Submit sick leave request. Vacation and sick days are visible in the team calendar. | ✓ | ✓ | ✓ | ✓ |
| **Check-in / Check-out** | Start time tracking online at start of work and stop for breaks and end of work. | ✓ | ✓ | ✓ | ✓ |
| **Breaktime rules** | Monitor labor law requirements related to minimum break times. | ✓ | ✓ | ✓ | ✓ |
| **Holiday calendar** | Consideration of holidays according to the set up holiday calendar. | ✓ | ✓ | ✓ | ✓ |
| **Project times** | Employee working hours booked on projects. | | ✓ | ✓ | ✓ |
| **Activity record** | Automatically generated report with booked project times for an invoice. | | ✓ | ✓ | ✓ |
| **Auditable timesheet** | Individually compilable timesheet with check workflow. | | | ✓ | ✓ |
| **Create your own project time categories** | Categories for project times, e.g. to separate billable from internal times. | | | | ✓ |
| **Advanced rules and checks for timesheets** | Extended possibilities to configure rules and checks for timesheets yourself. | | | | ✓ |

## CRM & SALES

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| **Organizations** | Overview of all organizational customers and suppliers of the company. | | ✓ | ✓ | ✓ |
| **Customers** | Overview of all customers of the company. | | ✓ | ✓ | ✓ |
| **Prospects** | Overview of all prospects of the company. | | ✓ | ✓ | ✓ |
| **Suppliers** | Overview of all suppliers of the company. | | ✓ | ✓ | ✓ |
| **Contact management** | Contact management with data on all personal and organizational contacts. | | ✓ | ✓ | ✓ |
| **Contact documentation** | History with tickets, documents etc. for personal and organizational contacts. | | ✓ | ✓ | ✓ |
| **Reminders** | Task type for resubmissions of a specific item at a specific time. | | ✓ | ✓ | ✓ |
| **Customer files** | Overview with all relevant information about a customer. | | ✓ | ✓ | ✓ |
| **Synchronization with Outlook, Mac & Smartphone** | Synchronization of mails, contacts and calendar to Microsoft Outlook, Mac and smartphone. | | ✓ | ✓ | ✓ |
| **Telephone interface** | Automatic recording of incoming and outgoing calls (also Microsoft Teams) and documentation of type, duration and call partners (requires separate setup). | | ✓ | ✓ | ✓ |

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| **CRM & SALES** | | | | |
| **Key Account Management** — Fixed contacts for key organizational customers with potentially extended access. | | ✓ | ✓ | ✓ |
| **Sales opportunities** — Tool to capture, score and follow up with prospects in the sales funnel. | | | ✓ | ✓ |
| **Sales funnels** — Customizable sales funnels with phases to close the sale. | | | ✓ | ✓ |
| **Personal sales via VIPs** — Key personal contacts of the company (e.g. multipliers) with special support. | | | ✓ | ✓ |
| **Partner Management** — System for managing sales partners. | | | ✓ | ✓ |
| **Forecast** — Prediction of future revenues based on sales funnel data. | | | ✓ | ✓ |
| **Sales analysis** — Various reports and analysis tools to measure sales success. | | | ✓ | ✓ |
| **Campaigns** — Tool to plan and execute marketing and sales actions (e.g. mailings). | | | ✓ | ✓ |
| **Layouts and external access** — Set up layouts for letters yourself and manage external access for customers and partners. | | | ✓ | ✓ |
| **Create your own sales phases and funnels** — Ability to configure sales phases and funnels yourself. | | | | ✓ |
| **PROJECT MANAGEMENT** | | | | |
| **Main projects** — Projects at the highest hierarchical level. | | ✓ | ✓ | ✓ |
| **Subprojects** — Sub-projects subordinate to a main project. | | ✓ | ✓ | ✓ |
| **Project phases** — Sections of a project that follow one another in time. | | ✓ | ✓ | ✓ |
| **Work packages** — Tasks to be completed within a project. | | ✓ | ✓ | ✓ |
| **Time budgets** — Time schedule for a project or a project component (subproject, work package). | | ✓ | ✓ | ✓ |
| **Gantt charts** — Graphical representation of the time sequence of project tasks. | | ✓ | ✓ | ✓ |
| **Project time tracking** — Recording of working times for a specific project. | | ✓ | ✓ | ✓ |
| **Standard project roles** — Predefined roles within a project with certain rights (e.g. editor, colleague). | | ✓ | ✓ | ✓ |
| **Individual project roles** — Individually adjustable own roles within a project. | | ✓ | ✓ | ✓ |
| **Milestones** — Important milestone within a project. Milestones can be defined time- or event-dependent, locally and globally. | | ✓ | ✓ | ✓ |
| **Costs** — Planning of target costs and recording of actual costs for a project. | | ✓ | ✓ | ✓ |
| **Dynamic Resource Planning (DRP)** — Dynamic allocation of resources to projects, e.g. taking into account sick days. | | ✓ | ✓ | ✓ |

**teamspace**
Digital business system

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| **PROJECT MANAGEMENT** | | | | | |
| **Project directories** | Folder structure for categorizing projects. | | ✓ | ✓ | ✓ |
| **Project history** | Overview of all activities in the course of the project so far. | | ✓ | ✓ | ✓ |
| **Layouts for project reports** | Create and manage layouts for different types of project reports. | | | ✓ | ✓ |
| **Manage your own project roles, rights, etc.** | Define your own project roles and manage rights yourself. | | | | ✓ |
| **CAPACITY PLANNING** | | | | | |
| **Capacities** | Capacity requirements and available capacity for scheduling and employee assignment. | | | ✓ | ✓ |
| **Monthly capacities** | Planning and evaluation of capacities on monthly level. | | | ✓ | ✓ |
| **Daily capacities** | Planning and evaluation of capacities at daily level. | | | ✓ | ✓ |
| **Warning levels & warning system** | Warning system with various target/actual comparisons and warning levels according to degree of deviation. | | | ✓ | ✓ |
| **Utilization analyses** | Analysis for the utilization of employees in the context of capacity planning. | | | ✓ | ✓ |
| **Extended possibilities for own configuration** | Additional setting options for configuring capacity planning. | | | | ✓ |
| **QUALITY MANAGEMENT** | | | | | |
| **Idea Management** | Document template and review workflow to collect and evaluate ideas. | | | ✓ | ✓ |
| **Task lists** | Document template and review workflow to collect tasks. | | | ✓ | ✓ |
| **Project applications** | Document template and review workflow for proposals within a project. | | | ✓ | ✓ |
| **Project status reports** | Document template and review workflow for status reports within a project. | | | ✓ | ✓ |
| **Approvals** | Document template and review workflow for approvals. | | | ✓ | ✓ |
| **Acceptances** | Document template and review workflow for acceptances. | | | ✓ | ✓ |
| **Work instructions** | Document template and review workflow for work instructions. | | | ✓ | ✓ |
| **Process descriptions** | Document template and review workflow for process descriptions. | | | ✓ | ✓ |
| **Layouts for QM documents** | Create and manage layouts for different types of QM documents. | | | ✓ | ✓ |
| **Create and manage your own inspection workflows** | Set up and manage your own review workflows for QM documents. | | | | ✓ |

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| **HR** | | | | | |
| **Vacation** | Manage leave accounts. Review and approve vacation requests. | ✓ | ✓ | ✓ | ✓ |
| **Sick leave** | Document sick leave and display sick days in the overview. | ✓ | ✓ | ✓ | ✓ |
| **Overtime** | Document, display and manage overtime (compensatory time off, payment, etc.). | ✓ | ✓ | ✓ | ✓ |
| **Employment contract data** | Digitally store employee contract data. | ✓ | ✓ | ✓ | ✓ |
| **Protection classes** | Different security levels for accessing personnel data. | ✓ | ✓ | ✓ | ✓ |
| **Contracts** | Store contracts in the system. | ✓ | ✓ | ✓ | ✓ |
| **Skill management** | Document and evaluate employee skills in the categories of professional, language and social skills. | | ✓ | ✓ | ✓ |
| **Commissions** | System for provisioning employees according to different benchmarks. | | ✓ | ✓ | ✓ |
| **Annual goals** | Set goals for employees for the year and review goal achievement. | | ✓ | ✓ | ✓ |
| **Employee reviews** | Plan and document employee appraisals. | | ✓ | ✓ | ✓ |
| **Employee payments** | Overview of payments to employees (travel expenses, commissions, etc.). | | ✓ | ✓ | ✓ |
| **Meal per diems** | Consideration of standard lump sums for the crediting of meals. | | ✓ | ✓ | ✓ |
| **KPIs** | Key figures on employee productivity. | | ✓ | ✓ | ✓ |
| **Employee alert system** | Warning system for deviating workloads or time bookings of employees. | | ✓ | ✓ | ✓ |
| **FINANCE** | | | | | |
| **Offers** | Generate and track offers for customers using templates, CRM data, and item master. | | ✓ | ✓ | ✓ |
| **Orders** | Generate order confirmations for offers, manage orders, and manage billing. | | ✓ | ✓ | ✓ |
| **Invoices/ Cancellations** | Generate, cancel and dun invoices (e.g. according to payment plan or billing rules). | | ✓ | ✓ | ✓ |
| **Inquiries** | Document inquiries to suppliers in the system. | | ✓ | ✓ | ✓ |
| **Orders** | Document purchase orders with suppliers in the system and generate purchase order sheets. | | ✓ | ✓ | ✓ |
| **Incoming invoices** | Document incoming invoices from suppliers in the system and release them for payment. | | ✓ | ✓ | ✓ |

# Overview of Functions

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| **FINANCE** | | | | | |
| **Financial accounting export** | Export financial accounting data for further processing. | | ✓ | ✓ | ✓ |
| **Checks** | Audit workflow for the release of documents. | | ✓ | ✓ | ✓ |
| **Material** | Book material costs, take them into account for controlling and, if necessary, allocate them further. | | ✓ | ✓ | ✓ |
| **Travel expenses** | Document travel expenses, book them and release them for payment to the employee. | | ✓ | ✓ | ✓ |
| **Accounting transactions** | Linking of monetary amounts e.g. to a project, employee or cost center for analysis and further allocation. | | ✓ | ✓ | ✓ |
| **Cost types, cost centers** | Classification of costs according to cost types and cost centers. | | ✓ | ✓ | ✓ |
| **Calculations** | Invoice-related summary of costs for cost units. | | ✓ | ✓ | ✓ |
| **Cost center planning** | Plan figures for a specific cost center for the planning period. | | ✓ | ✓ | ✓ |
| **Monthly statements** | Collecting settlement amounts for monthly settlement. | | ✓ | ✓ | ✓ |
| **Surcharges and commissions** | Surcharges and commissions can be set up in the system and are calculated automatically. | | ✓ | ✓ | ✓ |
| **Contribution margin analyses** | Comparison of revenues and expenses and calculation of contribution margin. | | ✓ | ✓ | ✓ |
| **Audit workflow for records** | Workflow for submitting, checking and approving receipts in the system. | | | ✓ | ✓ |
| **Manage price lists and layouts yourself** | Create and manage layouts and price lists yourself. | | | ✓ | ✓ |
| **Create your own cost centers and cost types** | Set up and maintain cost centers and cost types for postings yourself. | | | | ✓ |
| **Manage articles, posting accounts, currencies, etc. yourself** | Manage item master, transaction accounts, and other financial options yourself. | | | | ✓ |
| **TICKET SYSTEM** | | | | | |
| **Standard ticket system** | System for process management. Incoming and outgoing communication is assigned an ID and collects all related processing operations. | | ✓ | ✓ | ✓ |
| **Automatic responses** | Automatic messages when mails are received in the ticket system. | | ✓ | ✓ | ✓ |
| **Channel splitting** | Different channels for structuring incoming ticket requests. | | ✓ | ✓ | ✓ |
| **Escalation** | Optional change of agent or channel for tickets that remain unanswered for a longer period of time. | | ✓ | ✓ | ✓ |
| **Ticket alerts** | Automatic notifications for individual tickets at a specific time. | | ✓ | ✓ | ✓ |

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# Overview of Functions

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| **TICKET SYSTEM** | | | | | |
| **Use SLAs** | SLA response times and automatic notifications can be used. | | ✓ | ✓ | ✓ |
| **Create SLAs yourself** | Define and set up your own Service Level Agreements. | | | | ✓ |
| **CALENDAR** | | | | | |
| **Calendar entries** | Overview with appointments, vacation, illness and other info for the entire team. | ✓ | ✓ | ✓ | ✓ |
| **Synchronization with Outlook, Mac & Smartphone** | Synchronization of mails, contacts and calendar to Microsoft Outlook, Mac and smartphone. | ✓ | ✓ | ✓ | ✓ |
| **Alarms** | General reminder with short description as popup, mail or similar. | ✓ | ✓ | ✓ | ✓ |
| **Smart alarms** | Reminder for a specific item within the system. | ✓ | ✓ | ✓ | ✓ |
| **Create your own appointment types** | Define own types for appointments and manage them yourself. | | | | ✓ |
| **Advanced options for own configuration** | Additional setting options for configuring the team calendar. | | | | ✓ |
| **DESK SHARING SYSTEM** | | | | | |
| **Workplace management** | Create, view and reserve workspaces in the company. | ✓ | ✓ | ✓ | ✓ |
| **Parking management** | Create, view and reserve parking spaces in the company. | ✓ | ✓ | ✓ | ✓ |
| **Booking system** | System for booking work spaces and parking spaces for employees. | ✓ | ✓ | ✓ | ✓ |
| **Standard planning** | A standard schedule can be created for recurring use. | ✓ | ✓ | ✓ | ✓ |
| **Employee overview** | Employees can see free work and parking spaces and colleagues' bookings at a glance. | ✓ | ✓ | ✓ | ✓ |
| **TO DOS** | | | | | |
| **To-dos** | Digital notes to document ideas, tasks, etc. and to provide additional information. | ✓ | ✓ | ✓ | ✓ |
| **To-do lists** | List of to-dos, e.g. as a protocol with tasks to be processed. | ✓ | ✓ | ✓ | ✓ |
| **Synchronization with Outlook, Mac & Smartphone** | Synchronization of to-dos to Microsoft Outlook, Mac and smartphone. | ✓ | ✓ | ✓ | ✓ |
| **Session logs** | Logging of to-do lists with time stamp. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** | Additional settings for configuration of to-dos. | | | | ✓ |

# Overview of Functions

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| **WIKI** | | | | |
| **Wiki pages** — Knowledge pages linked to each other and editable by team members, based on the Wikipedia model. | ✓ | ✓ | ✓ | ✓ |
| **Dynamic wiki pages** — Wiki pages whose content is dynamically based on specific reports, contacts, or the like. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** — Additional settings options for configuring wikis. | | | | ✓ |
| **BOARDS** | | | | |
| **Standard Boards** — Individually configurable board for sharing and moving notes and other system elements. | ✓ | ✓ | ✓ | ✓ |
| **Scrum Boards** — Board preconfigured according to the Scrum concept. | ✓ | ✓ | ✓ | ✓ |
| **Kanban Boards** — Board preconfigured according to the Kanban concept. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** — Additional setting options for configuring boards. | | | | ✓ |
| **FORUM** | | | | |
| **Forum** — Platform for the exchange of team members. Forums can be set up in general or for specific elements. | ✓ | ✓ | ✓ | ✓ |
| **News section** — Dedicated area to share news within the company. | ✓ | ✓ | ✓ | ✓ |
| **Editorial area** — Area for editorial content creation, e.g. for a company newspaper. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** — Additional settings options for configuring forums. | | | | ✓ |
| **MESSAGES** | | | | |
| **Chat** — Possibility of direct exchange with other team members. | ✓ | ✓ | ✓ | ✓ |
| **Inbox** — Inbox for messages and SMS sent within the company. | ✓ | ✓ | ✓ | ✓ |
| **Outbox** — Outbox for messages and SMS sent within the company. | ✓ | ✓ | ✓ | ✓ |
| **Internal messages** — Create and send internal messages. | ✓ | ✓ | ✓ | ✓ |
| **Imports** — Module for importing mails. | ✓ | ✓ | ✓ | ✓ |
| **SMS** — Module for receiving and sending SMS. | ✓ | ✓ | ✓ | ✓ |
| **Employee agreements** — Sending agreements to employees and marking them after they have been acknowledged. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** — Additional settings for configuring messages. | | | | ✓ |

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### FILE MANAGEMENT

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| **Default File Storage & Directories** | Company internal folder structure and file storage option. | ✓ | ✓ | ✓ | ✓ |
| **Private file directory** | Personal file storage location. | ✓ | ✓ | ✓ | ✓ |
| **Version management** | Version control allows access to older file versions. | ✓ | ✓ | ✓ | ✓ |
| **Public shares** | Share files and folders publicly. | ✓ | ✓ | ✓ | ✓ |
| **WebDAV connection** | System for integrating system directories into the company's file manager. | ✓ | ✓ | ✓ | ✓ |
| **Permissions** | Assign read and write permissions by user groups in the system. | ✓ | ✓ | ✓ | ✓ |
| **Protection classes** | Different security levels for access to directories. | ✓ | ✓ | ✓ | ✓ |
| **Automatic directory structures for new items** | Automatically created folders for filing new items. | ✓ | ✓ | ✓ | ✓ |
| **Alerts on modifications** | Automatic notification of directory changes. | ✓ | ✓ | ✓ | ✓ |
| **Extended possibilities for own configuration** | Additional setting options for configuring file management. | | | | ✓ |

### GENERAL

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|---|---|---|---|---|---|
| **Progressive Web App** | teamspace can be used as an online application with advanced app features outside the browser. | ✓ | ✓ | ✓ | ✓ |
| **Custom Fields** | Customizable fields to use for lists and elements. | ✓ | ✓ | ✓ | ✓ |
| **Color markers** | Free color coding to distinguish elements, e.g. appointments. | | | | |
| **Categories / Groups** | System-wide usable fields to categorize and group elements. | ✓ | ✓ | ✓ | ✓ |
| **Additional element fields** | Additional element fields that can be made visible if required. | ✓ | ✓ | ✓ | ✓ |
| **Pinboard / Top pinboard entry** | Special board for own use. Priority and number of entries are displayed in the status bar. | ✓ | ✓ | ✓ | ✓ |
| **API** | Programming interface for the connection of external systems. | ✓ | ✓ | ✓ | ✓ |
| **Manage bookmarks and text modules** | Manage bookmarks of employees and text modules in the system. | | ✓ | ✓ | ✓ |
| **Create custom fields** | Define and manage own custom fields. | | | ✓ | ✓ |
| **Set up own menus and interfaces** | Create and manage own menus and interfaces for the system itself. | | | | ✓ |
| **Advanced rights management for users (groups)** | Extended rights management for individual users or user groups in the system. | | | | ✓ |

# Overview of Functions

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| **EXTERNAL ACCESS** | | | | | |
| **Tickets** | Customer access to own tickets or tickets of the company. | | ✓ | ✓ | ✓ |
| **Invoices** | Customer access to invoices issued. | | ✓ | ✓ | ✓ |
| **Files** | Customer access to the company's file module. | | ✓ | ✓ | ✓ |