OnePlan

Professional Service Automation Built for the Microsoft Cloud



Professional Service Automation

OnePlan's Professional Services Automation is an end-to-end solution that provides service delivery organizations a single system of engagement for sales, resourcing, delivery, and billing. Streamline your delivery with workflows that align with every phase of the customer lifecycle.

Data-Driven Project Management

OnePlan

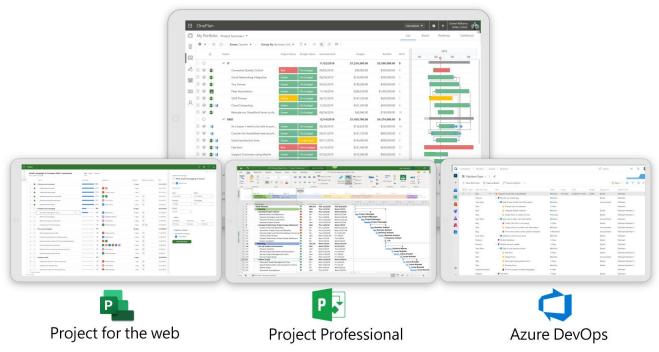
Track real-time project status with ease and empower your teams to identify threats to projects before they happen..

The Right Resources At The Right Time

Find the perfect resource for every engagement to ensure your customers are getting the support they need, when they need it.

A Profitable Business That is Repeatable

Make the right decisions to ensure profits are high and allocation is optimized. Prioritize what matters most and keep clients happy.



PHONE: 866-731-7011 | EMAIL: CONTACT@ONEPLAN.AI | VISIT: WWW.ONEPLAN.AI

OnePlan | Professional Service Automation

Get Clear Business Visibility by Account

View your projects by account as your business tracks them. Set any attributes and metrics you need to track. Manage delivery, costs, and billing with complete transparency.

-	0149										070
	0664	an									Dro
ŵ	Su	pport Ci	stomers using Mobile					Details.	Francish Real	and Film - Wor	Fact W Report
0	•	18	0 4 4 6 6 7 C 4 66	Render 7	1.0.1					-	Niger Schedule -
0	1415	+	Name	8254	Tals Tallet	Financials	Driven Hulpt	Actual Nam	Renáring Bul.	halpens.	ticinated Path.
8			V Ø Support Contament using Mubble	In Program			\$247,500.80	\$4.00	\$247,580.08	0%	\$122,728.8
83	1		∨ Beepe	In Program	010-3-		\$10,000.00	\$8.00	\$10,000.00	0%	\$8,000.0
			Datamine project acope	in Program	(0.0) 768	12	\$2,686.00	\$2.00	\$3,600.00	IN	\$1,000.0
18	12		Delive preliminary resources	Not Daried	(1) Do Two	8	\$1,400,00	\$2.00	\$1,981,38	15	\$2,800.0
60	12		Secure core recorded	Act Started	(0.00768)	8	\$1,695.00	\$2.00	\$1,688.36	IN	\$1,000.0
	14		Supercomplete	Aid Barted	(I) Do Tank	8	\$5.00	\$2.00	54.44	15	\$0.0
63	2		Y Deign	Not Started	010636		\$48,600.M	58.00	541,610 M	- 95	\$27,000.0
8			Review prelowinery software specifications	Not Barted	(1) Do Tank	18	507,000.00	\$2.00	\$27,000.00	15	\$10,000.0
	2.2		Develop functional specifications	Not Started	(0.0x7ack)	8	510300.00	\$2.00	\$10,000.00	IN	\$10,0000
	2.0		Obtain Approval on operational decurrent	And Started	(t) Do Said	8	\$1,485.00	\$2.00	\$1,675.26	15	\$1,000.0
	24		Design Complete	Not Started	(1) Do Tack	8	\$1.00	\$2.00	51.11	IN	900
	۰.		V Dealigneet	Nat Started	0.0+3+-		\$14,700.80	\$8.00	\$14,790.08	9%	\$21,800.0
			Review functional specifications	Act Stanial	(0.00768)	12	\$7,281.00	\$2.00	\$220.00	IN	\$4,000.0
	12		Develop code	Not Daried	(I) Do Tank	8	540,000.00	\$2.00	\$40,000.00	15	\$25,800.0
	33		Developer testing	Not Stanish	(1) Do Tech	8	\$4380.00	\$2.00	\$4500.00	IN	\$1,900.0
	14		Development Camplete	And Started	(1) Do Tank	18	\$5.00	\$2.00	58.00	15	\$10
	4		 Setting 	Not Started	010576-		\$75,800,80	58.00	\$75,840.04	- 95	\$41,000.00

Increased Resource Utilization

Ensure you have the right resources with the right skillsets assigned at the right time for maximum productivity and utilization.

	och Tearra	Q, Search				
٥	OnePlan					8708
	Support Customers using	Mobile ···			Details Financials Resour	a Plan - Modi Plan = - Reporting
0	marked plant 8					Lost · Apart 0129000
0						OnePlan
	Project Status Report					
16	Repeting Relations - Concerns	nanty		Nenger Intel Later Calumer Manager		
00	Name Search	man sing side		Culture Speece		
	175					
63	Owsell Bandlin	Schedule Health	Rearch Hullb	15x19x80	incrited?	Supermath.
8	(1.0x bet	\$3 Ar Ruis	010x1x8	(CONTRACT)	010x 9x5	(Contradi
	Overall Health Market	Schedule Health Status Need to pet hack on back	Knanclal Health Status	Effort Health Status	tean made Status	Scope Realf: Status
	Key Accomplishments					
	information and seek support-	-table they improvingly use mobil	e devices for.	. It is described largely by the quight mobile, what kinds of Ct probi		
	Upcoming Tasks for Next 2 Mea					
	A mobile-first strategy means to mobile device and the CE will be			w product, receive customer supp	ert, process a return or chat with a	n employee—it can be done on a

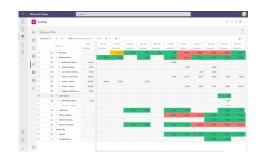
Leverage Insights into Time Spent

The success of your delivery business depends on effective billing. Estimate more accurately and prevent revenue leakage through bill automation

	OverFlat											520	0
	My Portfolio										a a balant	. Darman	
0													-
1.000	D-0 me	2 H 2											
18		PROJECTS HEALTH SUMMARY									OPlan		ā.
100		PROJECTS HEALTH SUMMARY									OPan		
12													
		CNR042-RecTor	1040	DID-BHOM			194040	ALHENDY		entrica 24304	140434	1	
10		220 m					1					1	
100													
-										•	-		
0			1.1	100				A ROUTER		247			
100		Property lies	-	and a	and a	Advantage of		Address .	Terrari Carlo	and the	Second State		
155		At the Density Valuetien Datasets	-					171402			HITLAGON T		
1		As a busin I need to be after to Carriene to product with the	ă	ă	ě.			111.003		10,000.00	to be set of		
0		Fig. As a memory of a read to the data to specialize manufacture		-	2			-		and the second second	And and a second		
		Contraction the Association of Association States	ă.	×.	×.	- 23		\$1000	11200.00	beam.or	D-COMPANY IN		
		Nexture	ŏ.	ă	ŏ	÷.,		181002	100.000	\$1,000 M	ATTAAND IN		
		Provident to part again serve to all designs.	•	•	•	- 62		27,040			107,141,00		
		transe the Experience (3) and to litera have Justice	•		0	- 82		BRADDO R	BOCOLO .	-	100,330.00 AN 100.00		
		Newpoint states code and states	8	8	2	- 13		STUDIO.	10104030		COC 140 TO		
					× .					-	BUT BALL		
		Informatil Trans Energenian and Horanging Information Diseascore Statute (Mise W1)	2	2	2	- 23	- 2	\$4730000 \$10,7000	SHE (% X)	0.0000	ELLY, MUR. NO.		10
		New Salarest Support Public	8	2	8	- 23	- 6	\$7,803	34.40.0		ATT ADD AT		
		Advance Darbon laws to Aber Sman	ă	ă	ŏ	- 20		74,000			EACHIER IN		10
		Miner Targradie	ŏ.	ō	ō	- 0		10.000			\$113.04L01		
		head						BLAND MELON	81,201,005,11	81,201 145,00	84,271,141,00		10
			ō	õ	ō		1		-	81,000,146,000			

Micro	icft Seam	•	G, Search									
0	OnePlan										0	
0	My Port	tolio							14 F 14			
0	• •	No. Specif	unan • E E Zoon Math •	Error By Serve		5 E - 6	0.21					
-		Plan Type	Sane	Sala	Contrast Amount	Driveled Bulget	Actual 7.	fernini.	Estimated Cest	Estimate	Margie V.	
٢		Access	* Cartasa Erginee'ng	Active	\$477,880.00	\$260,025.00	58.04	5460,715-00	\$210,900.00	1248,825.00	225	
		Support	Centeur Support Contract	later	\$13,580.00	\$11,180,00	51.00	\$10,000.00	\$4,000.00	\$7,800.00	303	
1.00		Priject	Cormon Digineering - Phase 2	Active	\$200,000.00	\$189,325.00	58.86	\$199,115-00	\$64,100.00	\$135,525.00	5476	
sb.		Coperturity	Centere Opportunity - Reneval	Active	\$13,580.00	\$16,560.00	58.00	\$10,000.00	\$4,000.00	\$4,500.00	475	
50		Project	Support Garperies using Mobile	Proposed	\$250,000.00	\$35,880.00	\$8.86	\$247,500.00	\$114,000.00	\$132,780.00	- 1975	
-		Accession	👻 Date inn	Active	\$1.97,880.00	\$177,880.00	58.80	\$185,415.00	541,100.00	\$114,575.00	575	
0		Opportunity	Adviser Bullets manage Markets.	Rupperd	\$18,880.00	58,400.00	58.00	56,400.00	\$4,200.00	\$4200.00	52%	
		Project	Motham: New Implementation	Artice .	\$175,880.00	\$155,400.00	58.80	\$101015-00	\$55,900.00	\$14,375.00	575	
8		Support	Andelian Support Central	Active	\$12,885.00	\$12,880.00	58.86	\$12,000.00	\$4,000.00	\$4,880.00	50%	
		James 1	 Notwell Tales 	Letion .	\$158,680.00	\$154,380.00	54.00	\$194,000.00	\$96,800.00	\$83,980.00	305	
		Opportunity		Proposed	\$400.00	90.00	58.86	\$2.08	\$2.28	\$1.00	15	
		Project	Sortheind Todes - Prese I	Active	\$158,880.00	\$151,380.00	58.80	\$150,000.00	\$66,800.00	\$45,580.00	505	
		Assessed	* Dry Research	Aller	\$177,880.00	\$170,775.00	51.10		\$73,900.00	14,075.00	345	
		Coport, nity		Proposed	\$13,580.00	\$13,380.00		\$10,300.00	95,000.00	\$2,580.00	50%	
		Papet	Fry Brassch - Plane 1	Active	\$153,885.00	\$140,775.00	58.80	\$145,715-00	\$63,900.00	174,075.00	50%	
		Seport	Tray Research Support Contract	Active	\$13,580.00	\$15,500.00	58.80	\$10,500.00	95,000.00	\$7,580.00	50%	
		Accessed	 Bile Tender Antres 	Proposed	\$128,880.00	\$130,000.00	58.00	1100.000	\$44,800.00	\$14,880.00	5475	
		Accession	 Utware by 	letine .	\$588,825.00	\$346380.00	51.10		\$184,685.77	\$53.780000	805	
			 OreFlat 	Address								

Solve Project Problems Before They Are Build credibility and trust by providing your customers with real-time, visual dashboards to track every aspect of your project.



Project Collaboration

The success of your deliverables relies on strong communication and visibility into your project assets.

W finite J = 1 Image: Strategie and Strateg	My Thembert HUNDER JACK 100 + 00 + 100 <		Mon					-	-	-	-	-	-	-	-					
Image: Second	Note::::::::::::::::::::::::::::::::::::	Image: Second		GnePl	in i													0.7	3.6	
Image: Control (Control (Contro(Control (Contro)(Control (Control (Control (Control (Control (Con	Image: Second	Image: Control (Control (Contro((Control (Control (Control (Control (Control (Control (Contro)(Co	6	My T	neh	eet Jul 18, 2021 - Jul 24, 202	101										-			
Image: state	0 0	Image: state	~	۲	• •	C D Tractery *	- II										(**	H0.85	52	
Image: Constraint of the state of	0 M1 M2 M2 </td <td>Image: Section 1 Image: Section 2 <th 2<<="" image:="" section="" td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>85</td><td>- 01</td><td></td><td></td><td>0.00 h</td><td></td><td></td><td></td><td></td></th></td>	Image: Section 1 Image: Section 2 Image: Section 2 <th 2<<="" image:="" section="" td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>85</td><td>- 01</td><td></td><td></td><td>0.00 h</td><td></td><td></td><td></td><td></td></th>	<td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>85</td> <td>- 01</td> <td></td> <td></td> <td>0.00 h</td> <td></td> <td></td> <td></td> <td></td>									85	- 01			0.00 h				
□ □ ■ Test matrix Compare Effect	0 0	□ 0				une I	CMIRE 371	10110	1011	1.4.20	wep 21	1422	-= 23	10.24	100%	POURD				
Image: Constrainty of the state of	0 0	Image: Construction of the section of the s	22		• 3	Intermina project scope fars SLor functor Addines Implements	Corpula		418	2.08	2.80	1.11			11.00	11/101				
Image Source as measurement Charge and the second	0 0	Image: Constraint of the state of	æ	0 0	a (ipport Sales San Julyrin Tana	An Corpide		238		180				8.00	1204	News			
Con Constant Section Section Constant Section Computer 200 300 100 100 100 100 1000	0 8 this Sympol customer up (which 10 10 10 10 10 0 9 thick Sympol customer up (which is the second seco	Q 0	82		1	intere store restances fan Support Castomers solng Misbil	Corpula		238	5.08	130	431			18.80	165,7150		Approal		
			6		a (ining preliminary substant specification of the second sec	Corpula			259	3.00	138			6.00	N/1019				
R D 0 B Text Toy Second A specification data Complexities 100 100 100 100 100	Starter • Versionsperform • Q Manuel Bank	Sandar 2 - Consenting	8		1	Brain Approach on specifications do fart Trey Research - Phase 1	Complementary			120	6.90				5.80	13.785				
Step / American Step / American Step / Step				Select	her.	-					- 0.4	hanced be	and a							

Business Analytics and Reporting

Empower good decision making through real-time visibility into dashboards and analytics for all aspects of your delivery including tasks timing, risks and issues, resource utilization and financial management.