Business Project Mgt.

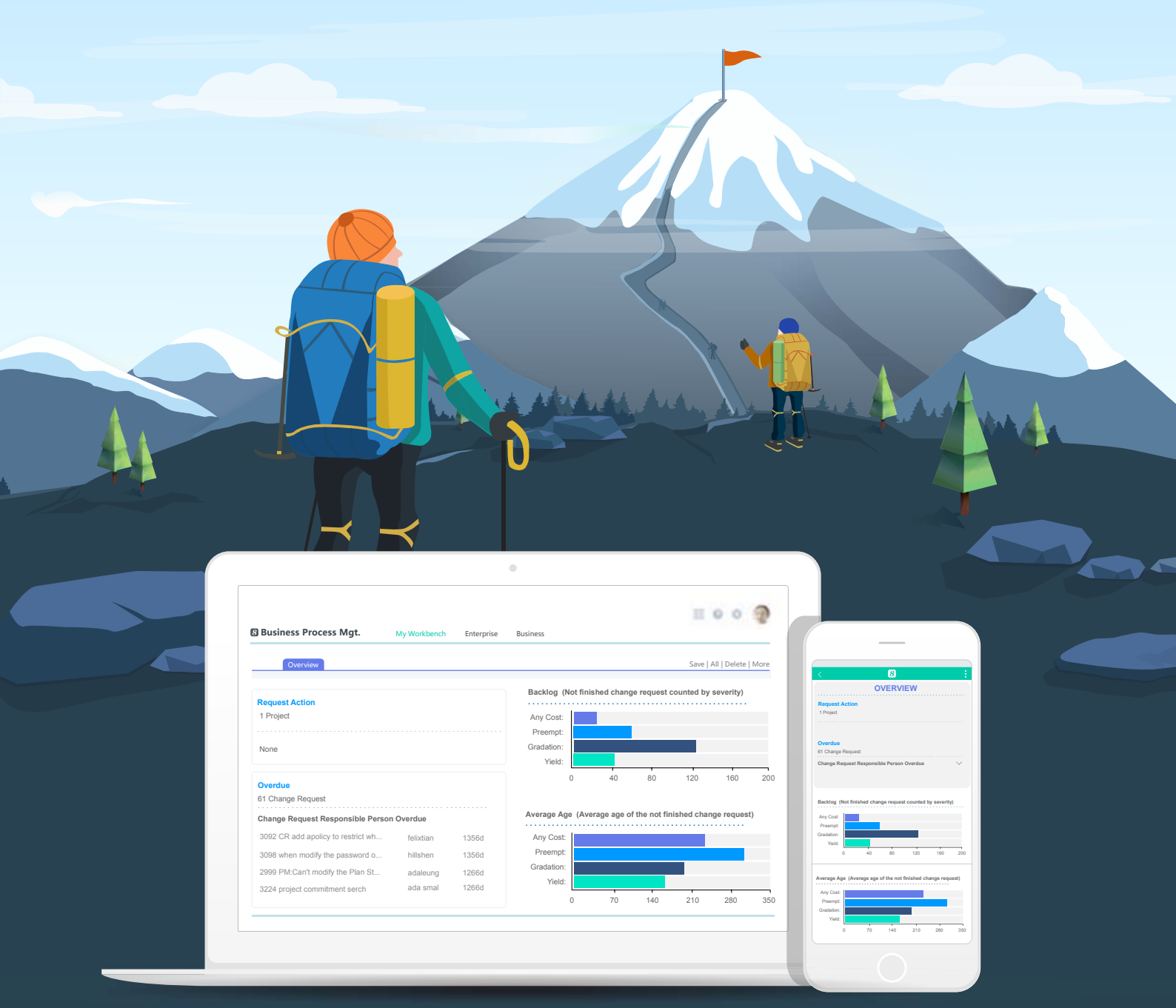
Gets a glimpse of the refined project overall

and improve business and project execution efficiency

8 Business Project Mgt.

8 can help you to manage clients, contracts, projects, resources, activities, procurements, delivery and acceptance, cost and income. With 8, you can maximize efficiency of your normal operations and minimize damages and delays of your abnormal operations by detecting deviations or problems and their root causes at the earliest possible time.

8 can be used to manage different types of business projects such as construction, professional service and OEM projects.



Contract and Project Integrated Mgt.

supports the entire contract and project life cycle which includes:

- Proposal and quotation mgt
- Contract and project execution mgt
- Milestone completion and SLA monitoring
- Change, change impact, revenue, cost and profit mgt
- Invoice and payment mgt
- Client satisfaction and contract renewal mgt

Proposal / Quotation ▸ Sign Contract ▸ Project Mgt. ▸ Delivery Mgt. ▸ Satisfaction Mgt. ▸ Renewal Mgt.

Real-time Interconnectivity

contract and project are interconnected in real-time, for example:

- Project cost would directly affect contract cost and profit
- The delay in project deliverable would directly affect contract revenue.
- The quality of project deliverable would directly affect contract SLA results.

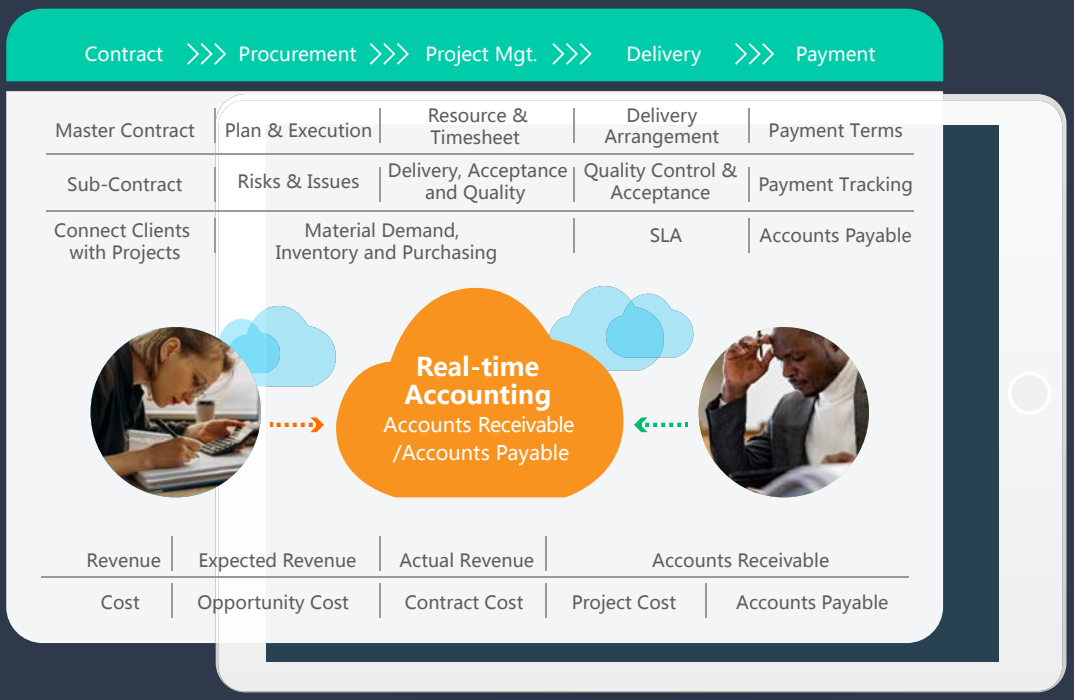
One contract can represent one or more projects

In most cases, a contract represents a single project. But in some areas such as investment and outsourcing, it is possible that a contract can create multiple projects and their results collectively affect the return of investment.

Sales Contract Mgt.

supports the following contract mgt features:

- Contract approval
- Transaction Contents (Products, Services and Prices)
- Delivery and SLA
- Procurement and payment
- Cost and profit mgt
- Payment terms, invoice and payment mgt
- Revenue recognition and mgt accounting
- Contract renewal mgt



Sales Contract:

supports sales contracts for products only, service only and products and services together. It also supports master contracts for specifying terms and conditions and associated sub-contracts or Statements of Work (SOW) to transact incrementally.

sales contract can be generated from or linked to a customer opportunity and be used to handle invoicing and payment.

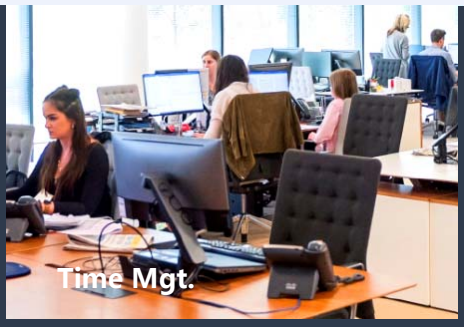
Procurement Contract:

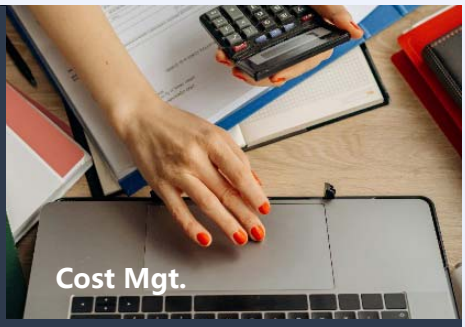
supports procurement contracts for buying products only, service only and products and services together. It also supports master contracts for specifying terms and conditions and associated sub-contracts or Statements of Work (SOW) to transact incrementally.

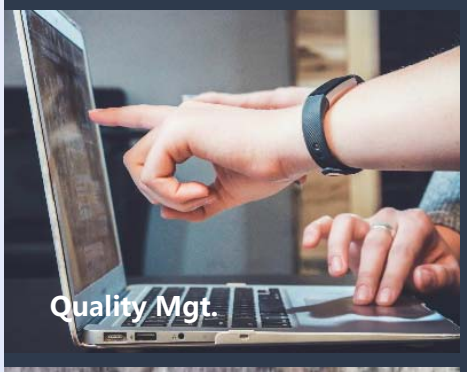
procurement contracts can be generated from or linked to a procurement plan and be used to handle invoicing and payment.

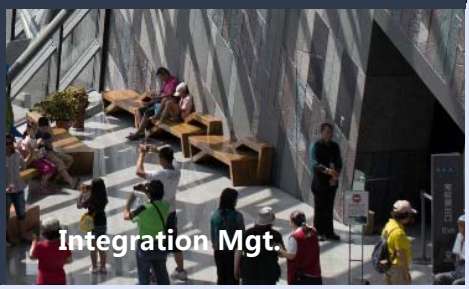
Project Mgt.

provides features to support the following 10 major areas:









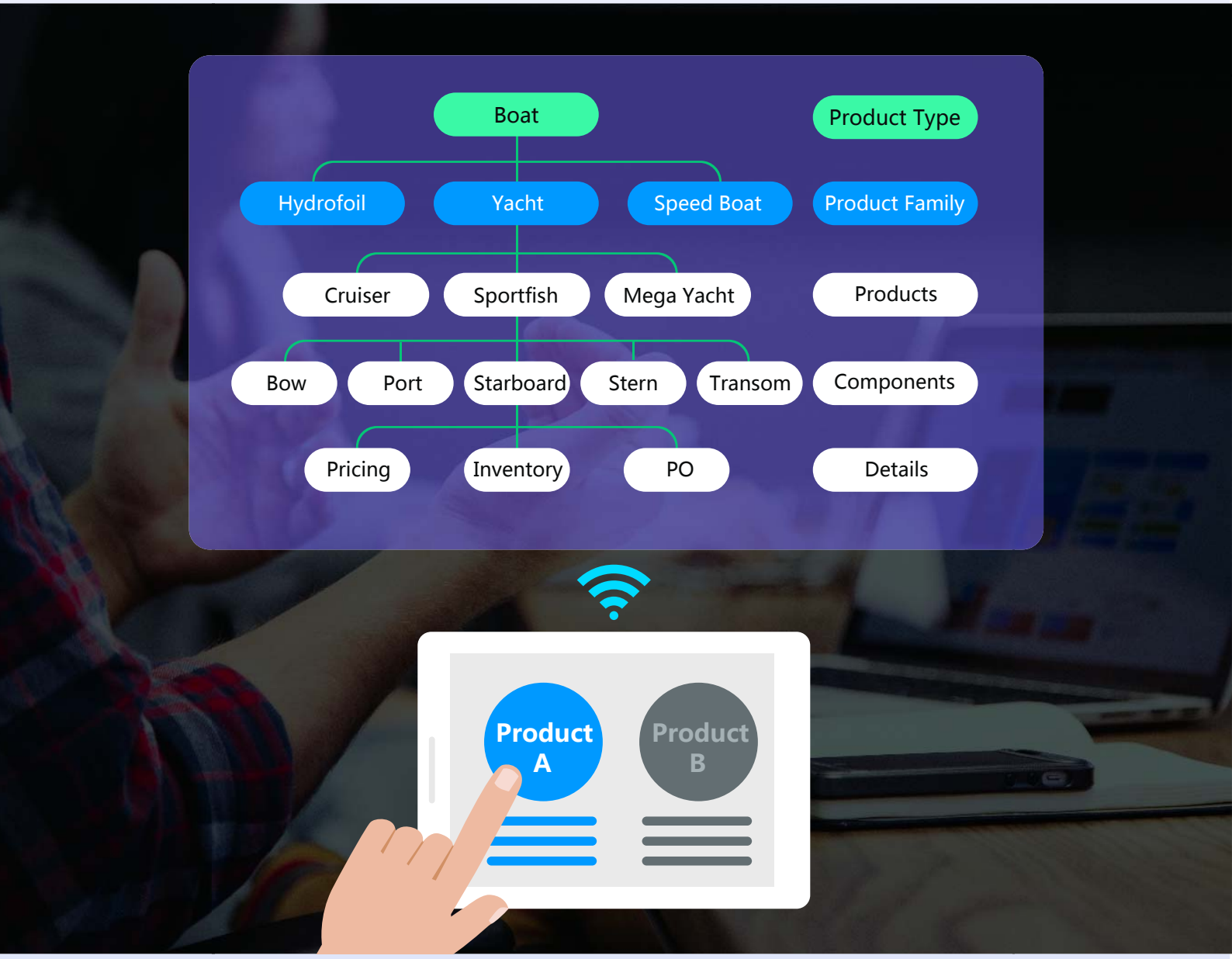
You can select part or all of these features to manage your projects.

- Policy setting
- Project plan and cost approval
- Resource Mgt
- Deliverable planning, quality control and delivery and acceptance
- Schedule, cost, problem and change tracking
- Risk recording and mitigation

Product Mgt.

CRM provides the following for you to manage your products:

- Product Master to allow you to define product types and subtypes, families, attributes and prices
- Product Component to allow you to define product structure, components, bundle and costs
- Cross-sell and Up-sell to allow you to define relationships with other products and services
- Pick-Pack-Ship to allow you to define the lead time, storage, inventory, packaging and transportation info



The Product module in CRM is the heart of CRM in the sense that it links to all client orders, returns and satisfactions/complaints associated with products. It is also the backbone for client, business and operation big data analysis.

Customer & Opportunity Mgt.

supports establishment and maintain complete customer information, including the following:

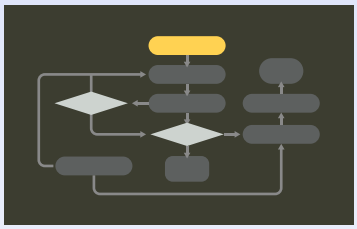
- Client organization chart and contact information
- Financial summaries and credit ratings
- Topics/Products of Interest
- Cross-selling and up-selling information
- Opportunities and communication records and results
- Historical quote, transaction and delivery information
- Customer satisfaction information
- Accountable receivable, invoice and payment information

Sales Automation

As sales team members, you can count on 8 to help you look-up client and contact profile and performance information, manage and track sales leads and opportunities, manage client appointments, activities and tasks, prepare quotations as well as prepare client interaction reports, sales performance reports and forecasts.

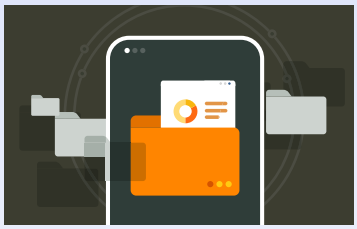
As sales managers and executives, your business objectives are to guide the delivery of the planned revenue, profit and cash-flow on target and on-time and to grow the sales teams in skills, expertise and performance. 8 provides a holistic view of your business as a whole with links that you can drill down to any level of detail for sales opportunity reports, and Sales performance reports by territory and by sales persons.

Workflow Mgt.



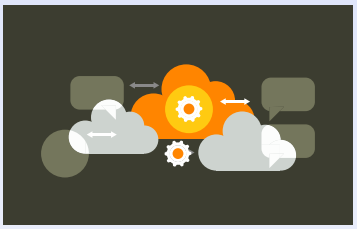
Automate repetitive tasks by allowing your teams to create workflows that trigger actions or send follow-up reminders for the next actions.

Document Mgt.



Collect, upload, store and share documents in a centralized location, making it easier for everyone involved to access information.

Lead Nurturing



Help your teams manage the process of converting leads to customers by developing relationships with prospects and creating targeted contents in each stage of the buyer's journey.

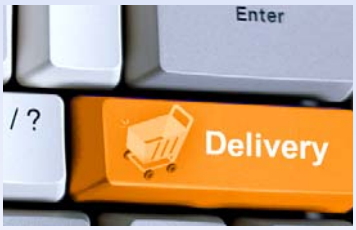
Recurring Revenue Mgt.

can help you build up recurring business practices so that you can develop trust and loyalty with your customers. They stick around because your product and service are worth paying for, which reduces customer churn and boosts your profits. You can identify the best areas of growth.

Contract Mgt.

Provide tools with best practices for contract drafting and clause negotiation, performance analysis to maximize operational and financial performance and risk mitigation.

Delivery & Support



Provide tools with best practices to manage and measure the swiftness of deliveries and conditions of delivered goods and services and the customer satisfaction level.

Client Mgt.

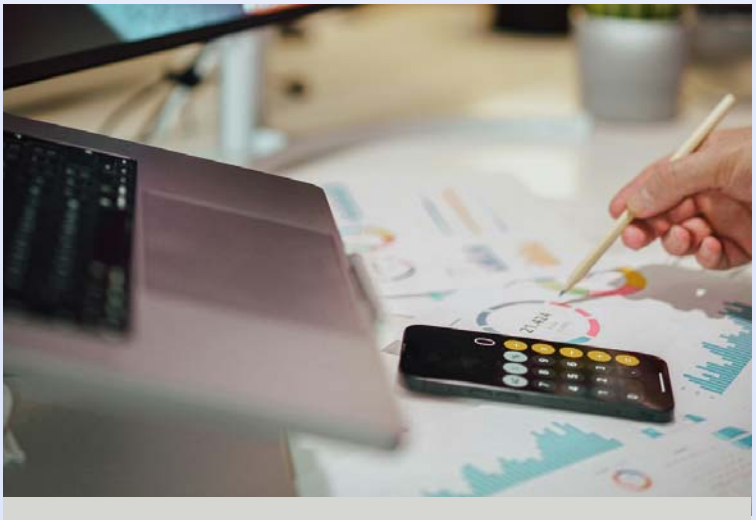
Provide tools with best practices to manage and measure communication progress of each client and detect any changes that may impact the client.

Recurring Profit Mgt.

helps an organization to establish revenue targets and track results.

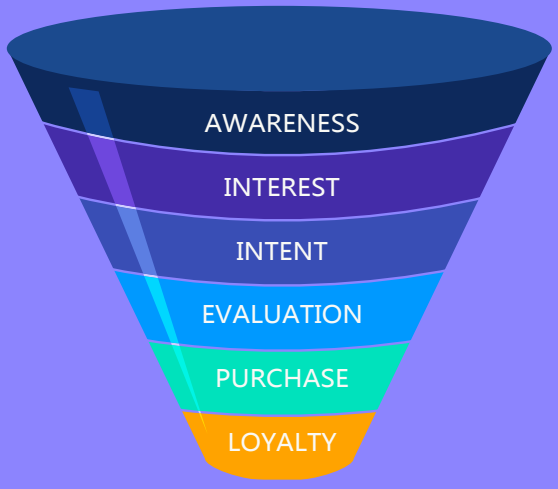
- Revenue target
- Real-time revenue recognition
- Detect deviation from target at the earliest possible time
- Display revenue according to region, organization, line of business and currency
- Sales funnel analysis

provides profitability mgt from the lowest level of projects and contracts where revenue and cost occur to the highest level of the enterprise.

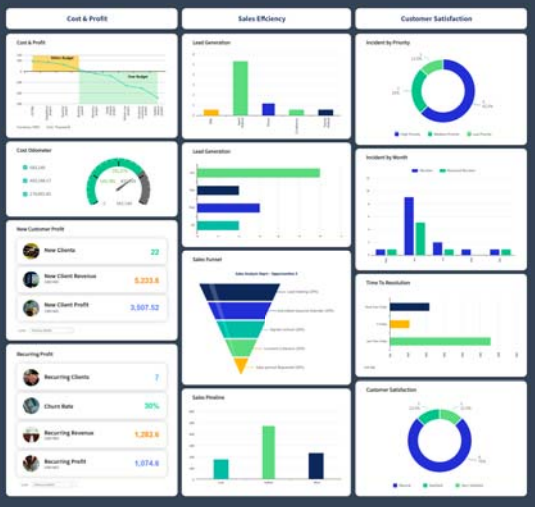


Revenue Target

Sales & Budget Analysis

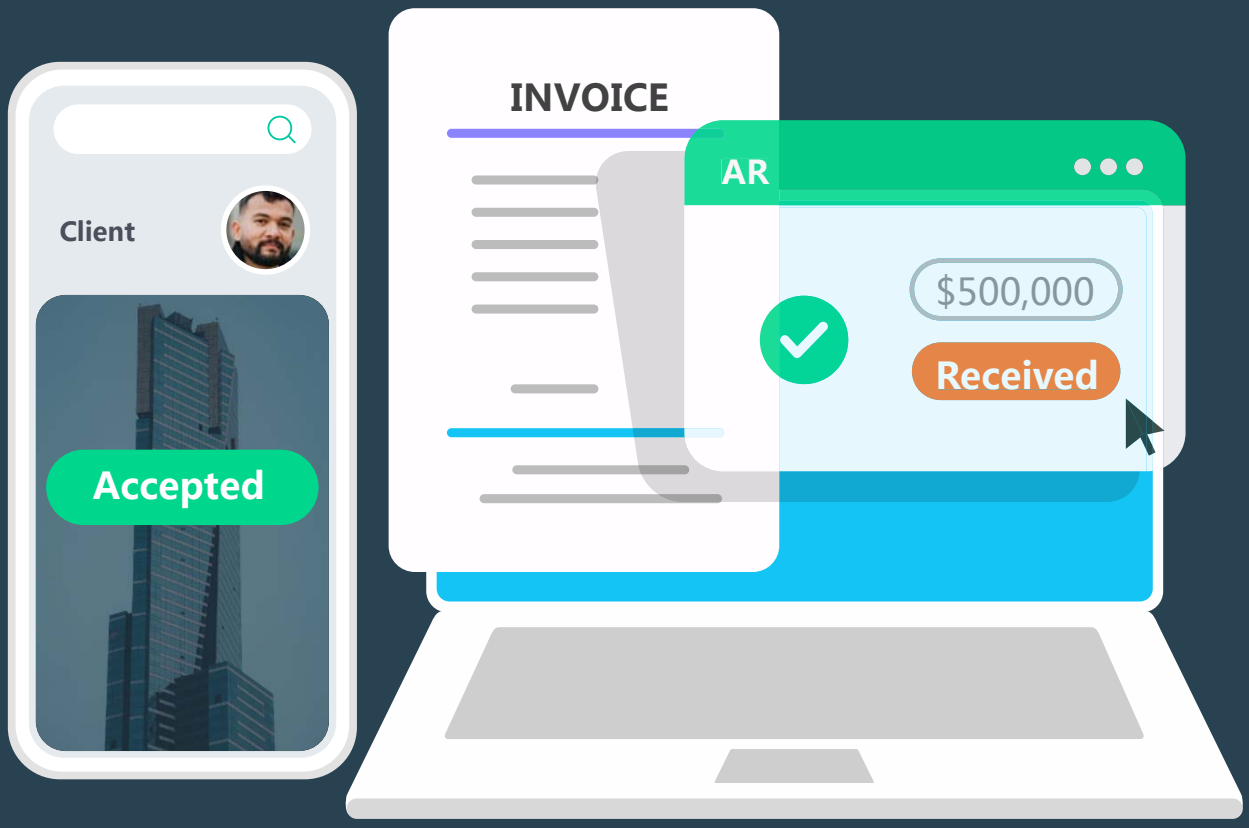


Sales Funnel Analysis



Real-time Revenue Analytics

Invoicing & Account Receivable



can automatically generate invoices based on predefined templates and payment terms in contracts, populate them with accurate customer data, and send them directly to clients. This automation not only saves time but also minimizes the risk of errors, ensuring that invoices are accurate and delivered promptly.

can also match incoming payments with the invoices (account receivable) to automatically detect late payments and display and send out alert messages

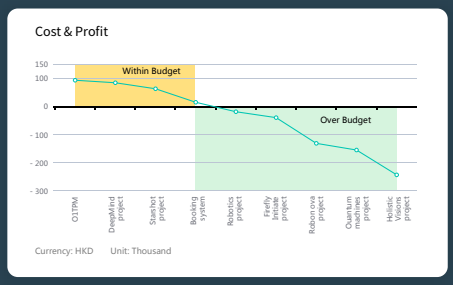
Profitability Mgt.

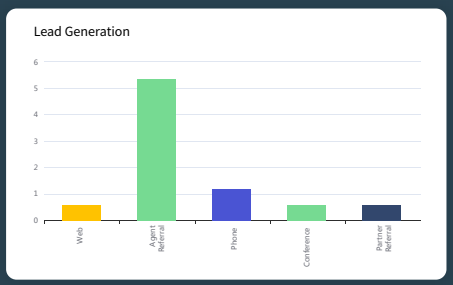
provides profitability mgt from the lowest level of projects and contracts where revenue and cost occur to the highest level of the enterprise.

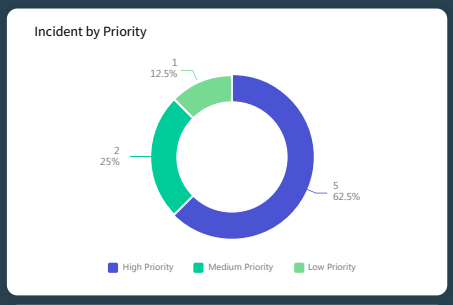
Business Analytics

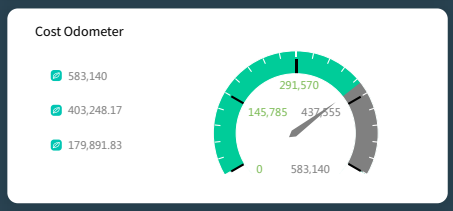
allows executives to:

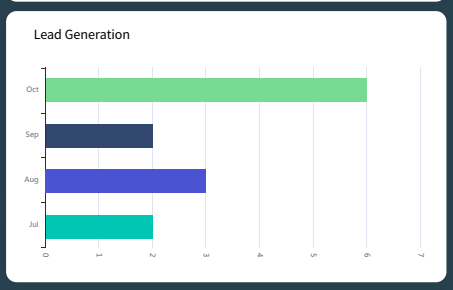
- Conduct trend analysis and forecasting, which provide valuable insights into market dynamics, customer behavior and business performance and to improve strategic planning
- Assess product fit, measure to manage better, identify patterns, collect customer feedback, see the bigger picture and to make better decisions
- Analyze data related to operations and processes to identify improvement opportunities. This may include streamlining processes, reducing costs, and increasing efficiency
- More observant with competitor analysis. customer feedback and external factors data and more proactive to look at other industries and similar companies overseas
- Identify potential risks through historical and real-time data analysis, providing early warnings and enabling timely intervention

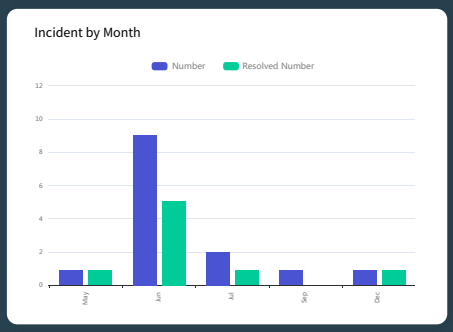


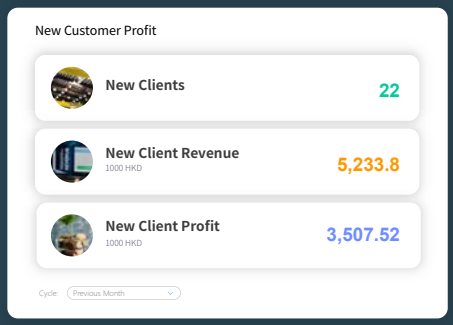


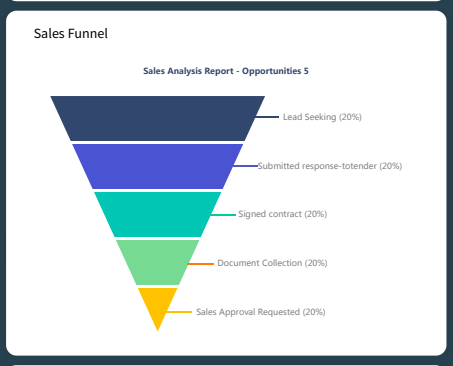


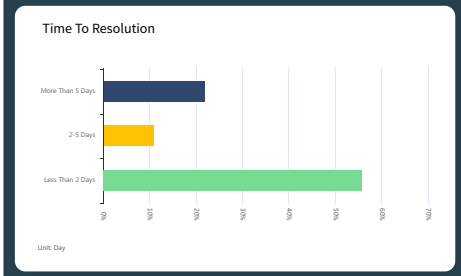


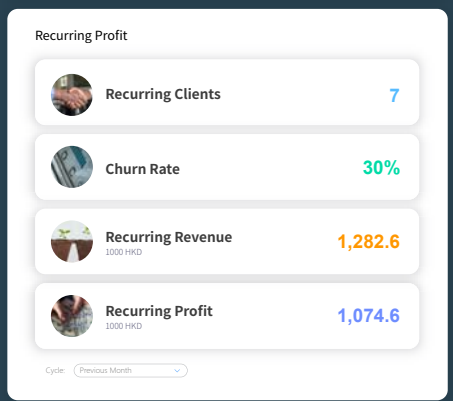


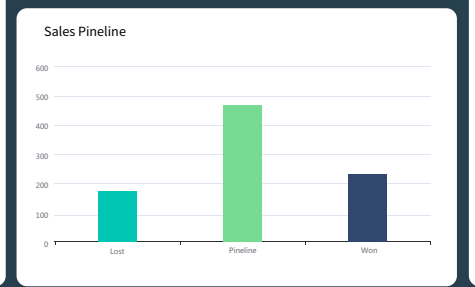


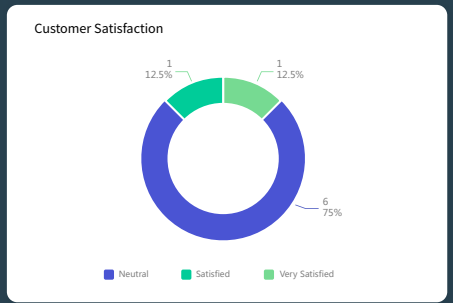












Business Project Mgt. Feature list

Feature	Description
Project Mgt.	
Project Request	
Create Project Request	Record project name, project type, requested budget and other info in project requests.
Risk Assessment	Support risk assessment for project requests.
Approval	Support to submit project requests for approval.
Linked to a Project	Support to link an approved project request with a project.
Project Initialization	
Create Project	Allow to create project by different methods, such as creating from the template, importing from mpp file, creating from scratch or copying an existing project.
Define Project Team	Allow to define project planners, project sponsors, project supervisors, managers, project assistants and approvers and grant appropriate privileges.
Define Project Chapter	Allow to define info such as objectives, stakeholders, assumptions, approaches, high-level scope, high-level schedule and budget ballpark in project charter.
Project Scope Document Mgt.	Support the uploading and easy access of scope-related documents.
Project Library	Support user-define library template for creating a new project library.
	Support auto creation of project library automatically when a new project is created.
	Support linkages of project deliverables to documents in project library so that documents created from a project can be accessed independently from project library.
	Support knowledge Mgt. in project library.
Project Activity Planning	
WBS	The form of 8Manage WBS is similar to Excel format, in which users can re-arrange the activity sequence, outdent or indent an activity by mouse or shortcuts. The system also supports the import and export of MS project files.
Assign Activity Owners	Able to assign the responsible person of the activities individually or by bulk replace;
	Allow multiple persons to be responsible for the same activity.
Set Up Deliverables	Allow to define deliverables details of activities/projects, including responsible person, scheduled FD, review and acceptance flow, quality standard etc.
Planning Methods	Support “top-down” and “bottom-up” planning methods; by combination of the two methods, it can better ensure the time restriction as well as the flexibility.
Sub-projects	A project can be inserted as an activity to another project’s WBS.
Critical Path	Critical path activities are visually displayed on WBS and 8Manage supports showing real-time critical path on web page and exporting PDF document.
Gantt Chart	Able to show the Gantt Chart in real-time and allow exporting it into PDF.
Baseline	Support the establishment of baselines for projects and individual activities.
Project Resource Planning	
Resource Type	Allow self-defining the resource type such as internal human resources, external human resources, and non-human resources for the projects; allow self-defining the resources properties.

Resource Working Calendar	Allow defining different working calendars; each project and each resource can have different working calendars.
Key Resource Warning	Conflict or overloading of key resources will be alerted.
External Human Resources	Able to manage the external human resources that participate in the projects.
Resource Skills	Able to self-define needed fields to record all the skills of the resources.
Resource Plotter	The system will list the matched resources that meet the requirements based on resource plotter.
Resource Workload Warning	The workload of a resource can be tracked during resource planning process and any overload can be detected and alerted by the system automatically.
Resource Allocation	Support resource tracking and adjustment request on resource allocation according to the resource's usage.
Project Deliverable Planning	
Deliverable Review & Acceptance	Allow to define different review and acceptance flow for deliverables.
Minimum Quality Requirement of Deliverables	Support setting the minimum level of quality control for deliverables on Enterprise/Project level.
Minimum Quality Requirement of Milestones	Support setting the minimum level of quality control for milestones on Enterprise/Project level.
Deliverable Completion Methods	Allow to set up metrics to evaluate the quality of the deliverables;
	Support to set up the calculate methods of the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
Budget Planning	
Approved Budget + Additional Forecast & Actual+Accrual	"Approved Budget + Additional Forecast" reflects the approved amount and the estimated amount acknowledged by the executives; "Actual+Accrual" reflects the actual amount and the amount estimated by the project team members. Their differences can provide overrun warnings.
Cost Control Rules	Allow to control the project cost in different cost classification levels and set up conditions when projects or cost should be (re)approved.
Cost Classifications	Allow to self-define different cost classifications by enterprise level or by each project.
Reserve Fund	Support managing the reserve fund of the project.
Asset Depreciation	Support managing the asset depreciation of the project.
Project Approval	
Multi-level Approval	Support multi-level approval function (e.g. allow project manager to approve top-level activities, project approvers to approve whole project plans).
Self-defined Approval Flow	Project approval flow can be pre-defined in the system or confirmed by the project manager when the project is submitted for approval.
Re-approval Restriction	Allow to define there-approval control parameters;when some critical goal was changed, such as the cost, scheduled FD etc., the system will require the project to be re-approved automatically.
Project Activity Execution	
Deliverable Mgt.	
Internal Review	Deliverable's responsible person submits the deliverable for internal review; Reviewer reviews the deliverable.
Acceptance	The accepter can accept or reject the deliverables after receiving the deliverables.
Commitment Mgt.	Allow the commitment management of the deliverables; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.

Deliverable Structure	Allow to define deliverable structure through defining the components of deliverables.
Deliverable Completion Feedback	Allow setting up target value of the metrics to evaluate the deliverables.
	The responsible can update the actual value, and the system will calculate the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
Project Resource Utilization	
Timesheet	Team members can use the timesheet to record their actual working hours in each project.
Resource Request & Approval	Support the resource request and approval process.
Resource Usage Record	Able to generate the usage records automatically according to the actual timesheet records, able to calculate the project resource costs automatically.
Resource Tracking	Resource tacking feature supports dynamically tracing the resource usage in a project and detecting any overload and resource conflict.
Commitment Mgt.	Allow the commitment management of the resource allocations; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.
Cost Mgt.	
Expense	The system supports the expense flow management from request to payment delivery.
Cost Classifications	The project can inherit the cost classifications of enterprise, or adjust the inherited classifications to maintain its own one.
Budget & Actual Cost	Able to track the derivations between the planned budget and the real cost; able to provide warnings according to the pre-set cost warning rules.
Project Communication Mgt.	
Requests & Responses (Approval, Review, Acceptance)	When the user raises a request, the user being requested (such as the approver) will be able to receive and respond to it to achieve the purpose of interactions.
Notifications	When the plans are modified, or deliverables are reverted etc., the system will send out notifications automatically (the rules can be self-defined by the user).
	The system will also send out notifications to the responsible persons before the due day.
Escalations	Support to escalate to the leaders automatically if the pending requests are not being handled in due time.
Chat & Forum	Provide online chats and forums for instant communications.
Instant Comments & Emails	Allow team members to add comments for the projects, activities, deliverables, issues etc. online or via email at the same time.
	All the communications including the emails will be captured into the system by time sequences.
	Relevant team members will be able to keep track of the historical communication records when needed.
Project Change Mgt.	
Change Request	Allow users to record and handle the change request in the system.
Severity & Urgency Queue	Allow to define the severity of the change requests, provide urgency queue function to manage the change requests and to control the access rights.
Audit Trail	Provide audit trail to record all the changes of the change requests.
Self-define Function	Allow privileged user to self-define the basic information page and management flow of the CR.
Requirements Mgt.	
Requirements Capture	Allow users to record and handle project and product requirements in the system.
Priority & Settings	Allow to define the priority of the requirements, provide urgency queue function for requirement management and to control the access rights.

Audit Trail	Provide audit trail to record all the changes of the requirements.
Test Mgt.	
Test Case	Allow users to create test cases and associate them with requirements
Test Coverage	Allow users to measure the test coverage of requirements.
People Mgt.	
Project Work Performance Report	Provide various real-time project analysis reports as a reference during the executions, such as workload summary, quality summary, milestone completion status summary etc.
Reality Checks	Provide reality check functions to collect the comments from the project stakeholders and allow to answer the questions anonymously.
Project Monitoring	
Cost Monitoring	
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project cost.
Top-down & Bottom-up Budget Deviations	The system will monitor the deviations between the top-down and bottom-up budgets and by real-time.
Cost Overrun	The system will monitor the cost overrunning the approved budget in real-time automatically.
Budget Re-approval	With pre-set rules, when budget being modified, it will trigger the restriction to re-approve the project.
Progress Monitoring	
Dashboard & Warning	Provide project summary dashboard and the alert functions.
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project schedule.
Quality Monitoring	
Quality Monitoring	The system will keep track of the project quality dynamically by examining the following: uncommitted deliverables, overdue deliverables, deliverables without review and acceptance, rejected deliverables, deliverables with a high rejection rate, the most overdue deliverable etc.
Resource Monitoring	
Resource Overall Monitoring	The system will automatically monitor the overall resource conditions, including overdue resources, unreasonable allocations, overloaded resources, to-be-hired resources, un-committed resources etc.
Resource Effort Analysis Histogram	The system provides resource effort analysis histogram to analyze the total FTE, resource days or resource hours of the planned, requested, approved or actual resources usage.
Resource Effort Analysis Table	The system provides the analysis report to view and compare the FTE, resource days, resource hours of the total resource usage, the resource constraint and the variances.
Different Resource Reports	The system provides different resource reports to help monitoring the resource in different dimensions, e.g. the resource planning report, resource time & cost report, resource allocation & utilization report etc.
Risks & Issue Monitoring	
Risk Detection	Auto detection of the resource risk, schedule risk, cost risk, management risk etc. and demonstrates the risks in the project dashboard.
Risk Mgt.	Besides from the auto detection of the risk, the system also allows the user to record and monitor the risks found.
	The system supports to plan actions to deal with, reduce or avoid the risk, and supports the whole follow-up process until the risk is relieved or closed.
Issue Resolution	Support to keep track of the whole process of dealing with the issues found; including the issue registration, the impact analysis, the actions, actions follow-ups, issues solved and closed.

Re-forecast Mgt.	
Schedule Re-forecasting	8Manage supports schedule re-forecasting based on Schedule Performance Index (SPI), present date and mandatory dependencies.
Resources(Efforts) Re-forecasting	Allow to re-forecast the resources(efforts) according to the re-forecast schedule and the extra resources requests.
Cost Re-forecasting	Allow to re-forecast the cost budget according to the actual cost (AC) and the bottom-up budget cost.
Project Closing Mgt.	
Outstanding Item List	List all outstanding items (e.g., outstanding invoices) that must be handled before project closure.
Deliverable Archiving	Allow to move all the attachments of the deliverables into specific project folders in the project library.
Releasing Resources	Allow to release all the requested resources after closing the project.
Project Documents Mgt.	Allow to move all the remaining project documents into the project library.
Project Closure	Support to complete and close the project in the system.
Product Mgt.	
Product Master	Allow user-defined product types, families, sub-families and brands.
	Support auto generation of product ID based on user-defined rules.
	Support both global product view and group-oriented product view and access control.
	Able to store and maintain product info such as product type, product family, product name, product ID, product supplier, product price info in Product Master.
	Support to add user-defined fields in the product basic info page.
	Support packaging specification and quantity control.
	Support product costing based on purchase price or manufacturing cost.
	Support product pricing based on cost plus margin or list price minor discount.
	Support multiple price and discount rules based on client type and volume.
	Able to record up & cross sell product info.
	Provide inventory Mgt.: a) Track demand from sales orders b) Track supply from shipment info c) Track inventory movement and current quantity d) Support periodical stock check
	Support serial number or other identification Mgt.
	Allow user-defined product approval flow.
Product Analysis & Evaluations	Allow to analysis and evaluations of # of Clients, Total # of Campaigns, Presale ROI, Total Product Cost, Gross Profit, etc.

Sales Mgt.	
Client Mgt.	
Client Info Mgmt	Allow the user to record general info, contact info, privilege info etc. of clients.
	Allow the user to click the org chart for the corporate client to drill down to see the parent and its sub-organization info.
	Allow the user to define different sections, fields and field locations in the client general info page. Basically the user can design the layout of client general info page.
	Support batch import and update of massive client records.
	Support export of client info to Excel or PDF.
	Provide records of client info changes.
Quotation (for contract)	Allow users to record quotation for contracts.
Contract Mgmt	Allow users to record basic contract info, such as revenue item, profit & loss, payment terms.
	Support Service Level Agreement management in contract: a) User-defined measurement types b) Definition of target type, reward type and buffer type and penalty type c) Link with project milestones/user-defined milestones for SLA measures d) Calculation and monitoring of actual result and gap between target and result e) Track SLA target & result on one screen
	Support change approval before allowing to change the contents of an approved contract.
	Support version control in contract.
Invoicing and Payment	Provide convenient invoicing and payment functions: a) Generation of invoice based on payment terms b) Batch handling of invoices to a client/contract c) Batching handling of payment received from client to settle multiple invoices of a client for different contracts d) Linkage between invoice and payment e) Provide invoicing alert based on payment terms f) Provide detailed tracking report for invoice and payment

8 can provide best combination of standard products & redevelopment services for enterprise management and over 500 corporations in Asia are using our following modules on-premises or SaaS:

- **SRM** : Supplier Management, e-Procurement and e-Tender
- **PPM** : Project and Portfolio Management
- **CRM** : Corporate Client CRM and Consumer CRM
- **Timesheet** : Resource Time and Cost Management
- **New Way** : Visual Agile and Lean
- **Service** : Service Management
- **EDMS** : Electronic Document Management System
- **OA** : Office Automation
- **HCM** : Human Capital Management
- **All-in-one** : Enterprise Full Automation

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