



# Framåtblick nya Severa

Webinar Feb 2017

Susanne Neretnieks, Produktchef Visma Severa

# Agenda

- Bakgrund till nya Severa
- Omfattning av nya Severa
- Demo
- Tidsaspekt och nästa steg
- Frågor

# Bakgrund

Vanliga synpunkter från våra mindre nöjda kunder,  
pekar 40% på

## **Brister i användbarhet**

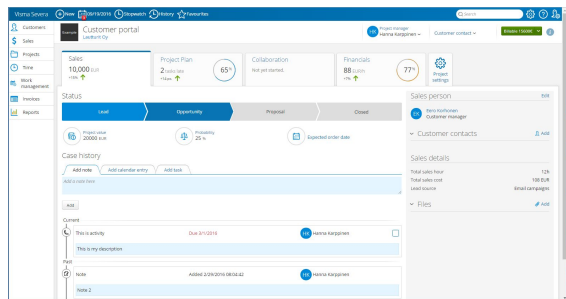
Vanliga synpunkter från våra nöjda kunder,  
pekar 60 % på

## **Vikten av användbarhet**

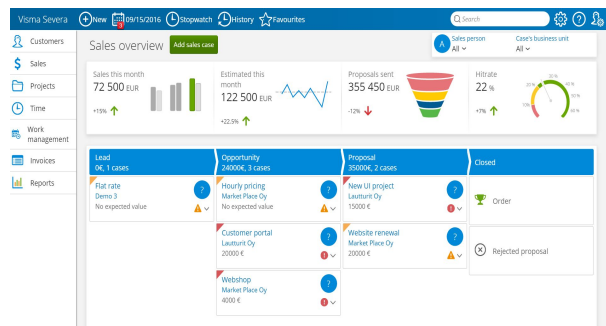
Användbarhet = Intuitivt att använda + Funktionalitet

# Omfattning av nya Severa

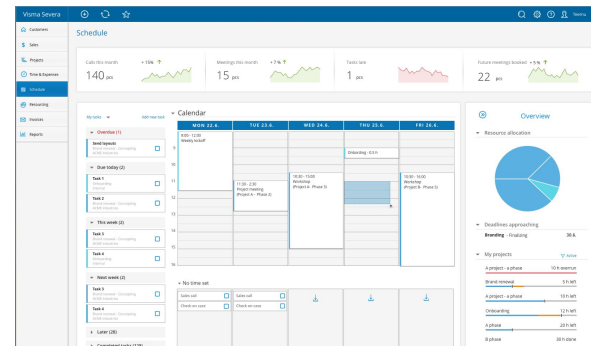
Ny design och förbättrad användbarhet



Snabbare insikt



Ytterligare funktionalitet



# Omfattning forts.

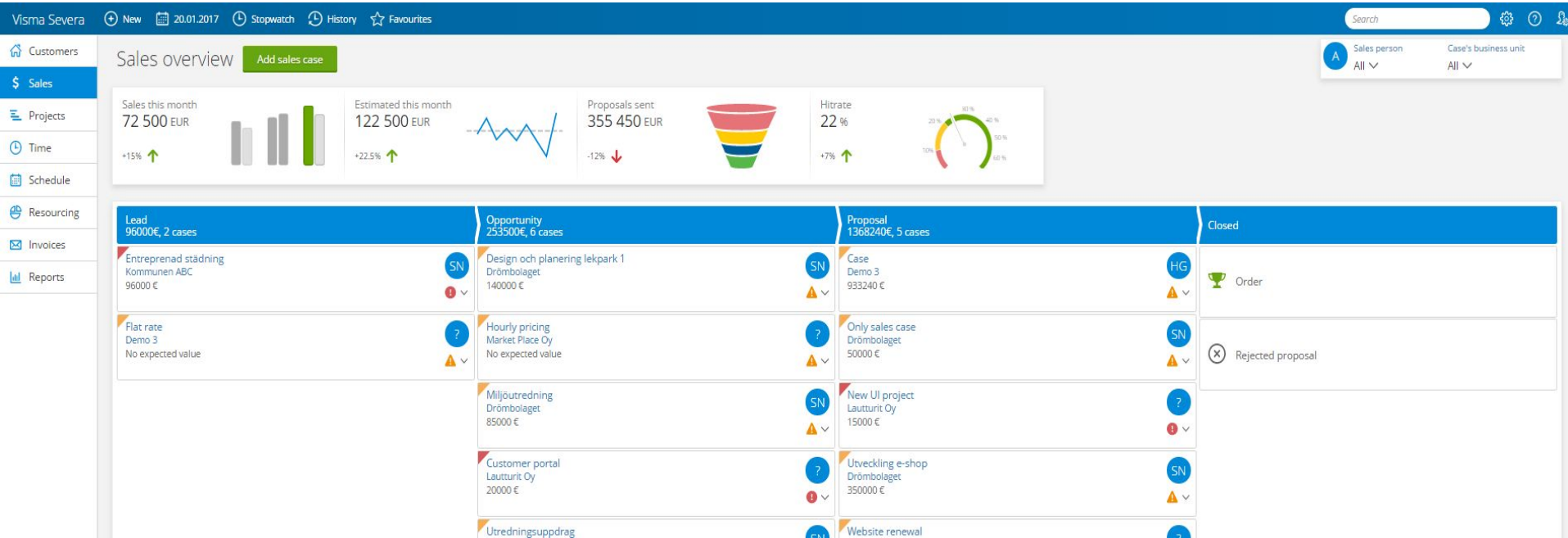
- Modernare plattform
  - Större lagringsmöjligheter
  - Förenklad infrastruktur för integrationer
- Nytt API
- Uppdaterad mobilapp

# Förbättrad funktionalitet

- 1:1 gamla och nya
- Säljupdrag och projekt
- Drag-and-drop och automatisering
- Resursallokering
- Prognostisering
- Användardokumentation integrerad i systemet

DEMO

# Sales pipeline





# Projekt - säljcase

Visma Severa New 20.01.2017 Stopwatch History Favourites Search Settings Help

**Customers** Example **Event 21 feb** Drömbolaget Project manager: Susanne Neretnieks Customer contact: Mats Mattsson Billable 625€

**Sales** 10,000 +15% ↑ **Project Plan** 2 +14 pc. ↑ 15% **Collaboration** Not yet started. **Financials** 88 +7% ↑ 32% **Project settings**

**Status**

Lead → Opportunity → Proposal → Order

**Project value** 18720 EUR **Probability** 100 % **Expected order date** 18.01.2017

**Case history**

Add note Add calendar entry Add task

Add a note here

**Add**

Past

Note Added 20.1.2017 10:42:03 SN Susanne Neretnieks

fjdsksdkjif

Note Added 18.1.2017 11:50:38 SN Susanne Neretnieks

Möte genomfört med ett par saker att återkoppla:  
1) fdfsks

**Deal details**

EK Eero Korhonen Customer manager

? Mats Mattsson

**Proposals** Add

📄 Proposal #1027-1 (Ready to be sent) 2017-01-19

📄 Proposal #1027-2 (Draft) 2017-01-19

**Sales details**

Total sales hour 12h  
Total sales cost 108 EUR  
Lead source Email campaigns

**Files** Add

# Projekt - projektplan

Visma Severa New 20.01.2017 Stopwatch History Favourites Search Settings Help Profile

Customers **Example** **Event 21 feb** Drombolaget Project manager: SN Susanne Neretnieks Customer contact: Mats Mattsson Billable 625€ Info

Sales: 10,000 (+15%) Project Plan: 2 (+14 pc.) 15% Collaboration: Not yet started. Financials: 88 (+7%) 32% Project settings

### Project plan

Project start: 09.01.2017 | Project end: 20.02.2017

2017  
January | February

Project	Progress / Estimate	People	Start	End
Event 21 feb	0 h / 56 h (0%)	3	Jan 9	Feb 20
Phases	Progress / Estimate	People	Start	End
Kravmöte	0 h / 4 h (0%)	2	Jan 9	Jan 9
Ta fram koncept	0 h / 8 h (0%)	1	Jan 14	Jan 14
Avstämningsmöte	0 h / 2 h (0%)	3	Jan 14	Jan 14
Färdigställa koncept	0 h / 4 h (0%)	1	Jan 20	Jan 20
Ta fram körschema och beställa material	0 h / 4 h (0%)	1	Jan 20	Jan 20
Genomföra event alla involverade	0 h / 24 h (0%)	3	Jan 20	Jan 20
Efterarbete	0 h / 10 h (0%)	2	Jan 20	Jan 20

Add a phase

# Projekt - samarbete

Visma Severa New 20.01.2017 Stopwatch History Favourites Search Settings Help

Customers **Example** **Event 21 feb** **Drömbolaget** Project manager: SN Susanne Neretnieks Customer contact: Mats Mattsson Billable 625€

Sales: 10,000 +15% ↑ | Project Plan: 2 +14 pc. ↑ 15% | Collaboration: Not yet started. | Financials: 88 +7% ↑ 32% Project settings

Comments

Internal only  Everyone (including customer)

Write a comment

Send to internal

18.01.2017

- SN Susanne Neretnieks 12:19  
Alla deltagare vidtalade
- SN Susanne Neretnieks 12:19  
Kunden vill ha uppdatering varje vecka

Team members (4) Add

- PK Pekka Karjalainen  
Project manager
- TJ Timo Jokinen  
Case owner
- EK Eero Korhonen  
Customer manager
- AH Anni Huhtala  
Software developer

Customer contacts (2) Add

- US Unto Sulava  
Project manager
- IK Inkeri Kallio  
Secretary

Files Add

SMA

# Projekt - finansiell information

Visma | Severa

Brand renewal 1329  
ACME Industries

Customers Sales Projects Time & Expenses Schedule Resourcing Invoices Reports

Aila Eero Sauli Pekka Tamara Sarah Unto

Billable 12 345,00 €

**Sales**  
10,000 EUR  
Tasks up to date

**Project Plan**  
2 tasks late  
Tasks up to date  
45%

**Collaboration**  
25 new comments  
3 files

**Financials**  
88 EUR/h  
+7%  
50% Billable rate

Project Settings

Set prices

Price list: Standard prices (1.1.2016) and 4 phase-specific prices

Work hours Travels Fees

Standard rate

Work type	Done by	Hourly rate (€/h)	Bill
Design work	Anyone	80.00	<input checked="" type="checkbox"/>
Chief designer work	Anyone	120.00	<input checked="" type="checkbox"/>
Internal work	Anyone	80.00	<input checked="" type="checkbox"/>
Travelling	Anyone	60.00	<input type="checkbox"/>
Bank holiday	Anyone	0.00	<input type="checkbox"/>

Overtime rate  
(Overtime-specific stuff goes here)

Exceptions

For phase	Consulting	use hourly rate	80.00 €/h	for	any worktype	done by	Hanna Karppinen	Bill
For phase	Consulting	use hourly rate	120.00 €/h	for	any worktype	done by	anyone else	<input checked="" type="checkbox"/>
For phase	Production	use hourly rate	80.00 €/h	for	Design work	done by	anyone	<input checked="" type="checkbox"/>
For phase	Extra changes	bill a flat fee of	10 000.00 €	for up to	100 h of work.	Extra hours:	80.00 €/h	<input type="checkbox"/>

Add phase-specific price

Add fees

Fixed fees - 29 398 € Travels - 2 330 € Subcontracting - 0 €

Already billed

Item	Quantity	Unit price	Total price	Billed on	Paid on

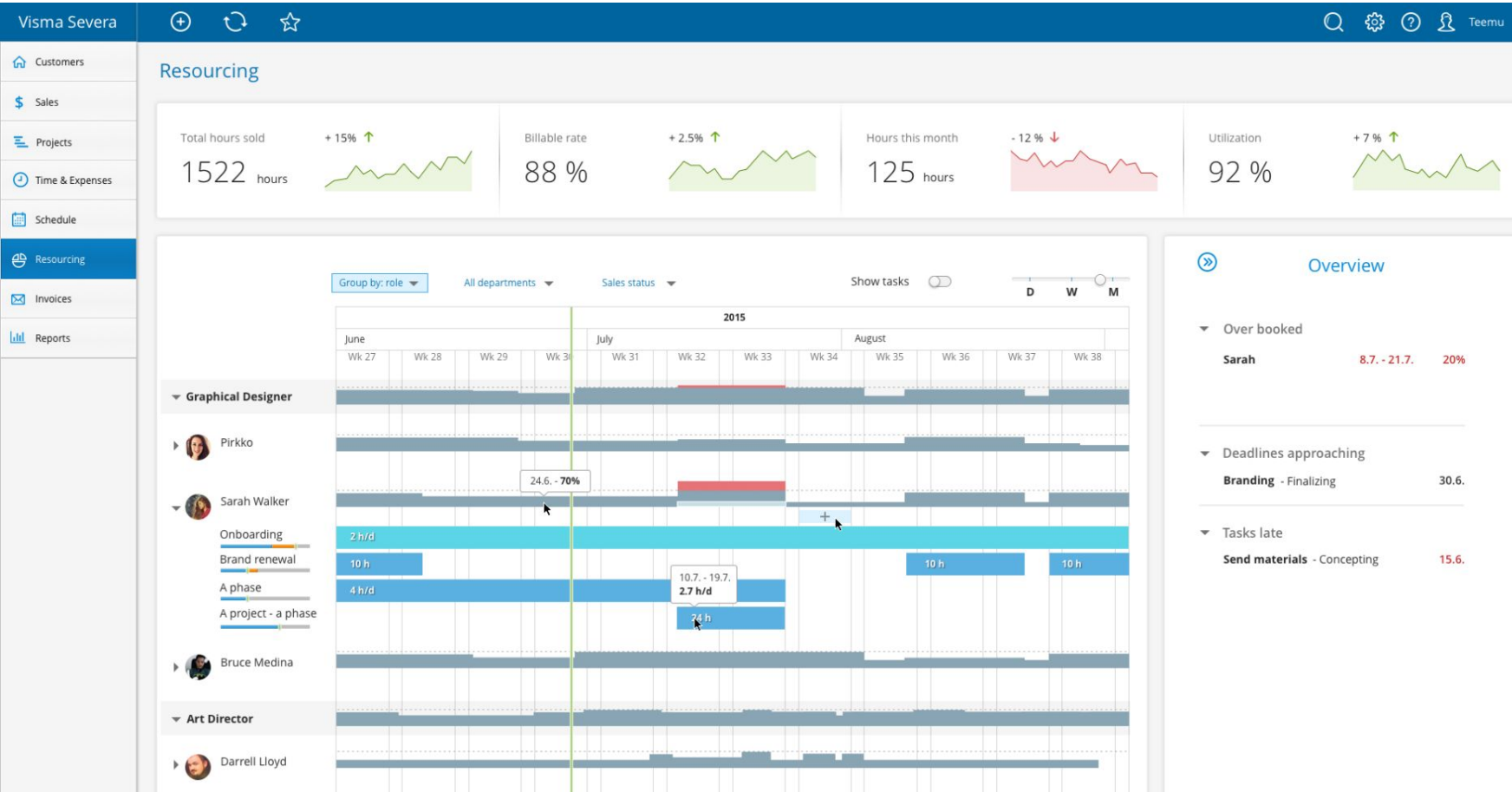
KPI  
Sales margin  
Average hourly profit  
Billable rate  
Total billable

KPI  
Deviations  
Invoices  
€62126.52  
€23211.04

Total

KPI  
Profitability  
€45334

# Resursallokering



# Rapportering av tid- och utlägg

Visma | Severa Q ⚙️ ? 👤 username

Customers Time & Expenses **SW** User Samuel Weinstrand Day Week

Sales

Projects

**Time & Expenses**


Schedule


Invoices


Reports


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**Time & Expenses**

Total flex time balance **+15% ↑**  - 5 hours

Billable rate **+2.5% ↑**  88 %

Hours this month **-12% ↓**  125 hours

Hitrate **+7% ↑**  22 %

[Show all 7 KPIs](#)

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WEEK 25

Mon 20.10. 8:30	<b>Tue 21.10. 7:30</b>	Wed 22.10. -	Thu 23.10. -	Fri 24.10. -	Sat 25.10. -	Sun 26.10. -	WEEK 16:00
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[Use latest workday as template](#) [Copy to other day](#)

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**TUESDAY 21, NOVEMBER 2016**

- UPM Kymmene Oy : 345678 Biorefinery new brand launch : Visual guidelines** **7,5 h**  
Art direction | Designing the typographic rules for print advertising and website renewal for the... | 8 h left
- Next step Media Inc. : Website renewal : Visual design** **1234,50 Kr**  
Taxi | Taxi trip from railway station to customer | 11:00-11:20

Type: Project  
Project: Zyztech Technologies Inc. : TV Ad Campaign : Design work  
Expense type: Own car, 4 passengers | Amount: 56,00 km  
Start time: 11:00 | End time: 11:20  
 No reimbursement required

- Valero Energy Corporation : Mobile app redesign** **1 day(s)**  
All day allowance, Norway | Business trip to Oslo office, 2 workshops | 11:00-11:20
- Zyztech Technologies Inc TV Ad Campaign: Design work** **1 pcs**  
Consulting day | Consulting day at customer office

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NOVEMBER 2016

Mo	Tu	We	Th	Fr	Sa	Su	
22	30	31	1	2	3	4	5
23	6	7	8	9	10	11	12
24	13	14	15	16	17	18	19
25	20	21	22	23	24	25	26
26	27	28	29	30	1	2	3

**ADD ENTRY FROM ACTIVITIES**

- Prepare presentation** 09:00 - 11:00
- Meeting with John Matthews** Customer name 11:00 - 13:00
- Prepare presentation** 09:00 - 11:00
- Meeting with John Matthews** Customer name 11:00 - 13:00

**TO BE REIMBURSED (5)**

**RECENTLY REIMBURSED (3)**

# Kalender och aktiviteter

Visma Severa

Customers

Sales

Projects

Time & Expenses

Schedule

Weekly plan

Activity list

Task kanban

Resourcing

Invoices

Reports

Schedule

22 pcs

Future meetings booked +5%

22 pcs

Calls this month +15%

140 pcs

Meetings this month +7%

15 pcs

Tasks late

1 pcs

Future meetings booked +5%

22 pcs

Task kanban Only me

Not started

In progress

Waiting for review

Done

Do the designs Design 5 h 26.11.2016

Do the designs Design 5 h 26.7.2016

Do the designs Design 5 h 26.7.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 1 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 5 h 23.12.2016

Do the designs Design 1 h 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Do the designs Design 23.12.2016

Calendar

FRI 26. G.

12:00 - 13:00 Meeting ACME Industries - Brand renewal - Concepting

My Tasks

This week (2)

Send materials DL 18.11. Christmas drinks camp... ACME Industries In progress

Finish layouts DL 18.11. Logo Coal Miners LTD Not started

Next week (2)

Prepare presentation DL 23.11. Christmas drinks camp... ACME Industries In progress

Initial concept DL 25.11. Logo Coal Miners LTD In progress

Later (28)

Completed (147)

Add task

10 h left 20 h planned

Starting later (6)

15

16

# Fakturering

Visma Severa
Teemu

**Invoices**

My Invoicing +15% ↑

25 000 €

Search  Search options

**Draft**

1 509 700 € 5 cases

Brand renewal case  
Account name: 857 100 €

**Waiting for approval**

599 900 € 3 cases

Brand renewal case  
Account name: 857 100 €

Brand renewal case  
Account name: 857 100 €

## Invoice #12312 (Draft)

**Billing details**

Project name: **New Severa Development** Invoice date: 25.5.2105

Customer: Visma Solutions Oy VAT number: 4975973-2

Address: P.O. Box 1, 10000, Oslo Payment terms: 30 days

Customer contact: Teemu Heimala Overdue interest: 10 %

**Invoice rows**

Category	Hours	Rate	Total
<b>Work hours</b>	204,5 h		18 432,50 kr (24%)
UX Design work, Shengjun Shi	114 h		10 260,00 kr
2.3.2016, Shengjun Shi, Internal discussion and design optimisation	3,5 h	90,00 €/h	315,00 kr
2.3.2016, Shengjun Shi, Legacy file clean up and update	8 h	90,00 €/h	720,00 kr
2.3.2016, Shengjun Shi, Working at client's	8 h	90,00 €/h	720,00 kr
2.3.2016, Shengjun Shi, Travelling	2 h	90,00 €/h	180,00 kr
2.3.2016, Shengjun Shi, Working in train	2 h	90,00 €/h	180,00 kr
<b>UX Design work, Lauri Sumari</b>	90,5 h		8 172,50 kr
<b>Travels</b>			449,18 kr
1.3.2016, Shengjun Shi, Train ticket Helsinki - Lappeenranta	1		
1.3.2016, Lauri Sumari, Train ticket Helsinki - Lappeenranta	1		
2.3.2016, Shengjun Shi, Train ticket Lappeenranta - Helsinki	1		
2.3.2016, Lauri Sumari, Train ticket Lappeenranta - Helsinki	1		
2.3.2016, Shengjun Shi, Sprint based design work: Daily allowance	1 pcs		
<b>Fixed fees</b>			0,00 kr
<b>Materials</b>			0,00 kr
<b>Subcontracting</b>			0,00 kr

**Totals:** Total before VAT: 17 271,85 kr  
 VAT 24%: 3 472,15 kr  
 VAT 10%: 232,29 kr  
 Rounding: 0,5 kr  
**Total: 350 918,00 kr**

**Totals for this month**

Invoicing spread

33% Fantastic Solutions  
24% Alliance Oy  
33% Acme Industries, Inc.  
10% Other

**Overdue**

#1572 Johnson's Tools 150 €  
 #1601 Messerschmitt Ltd 2 000 €

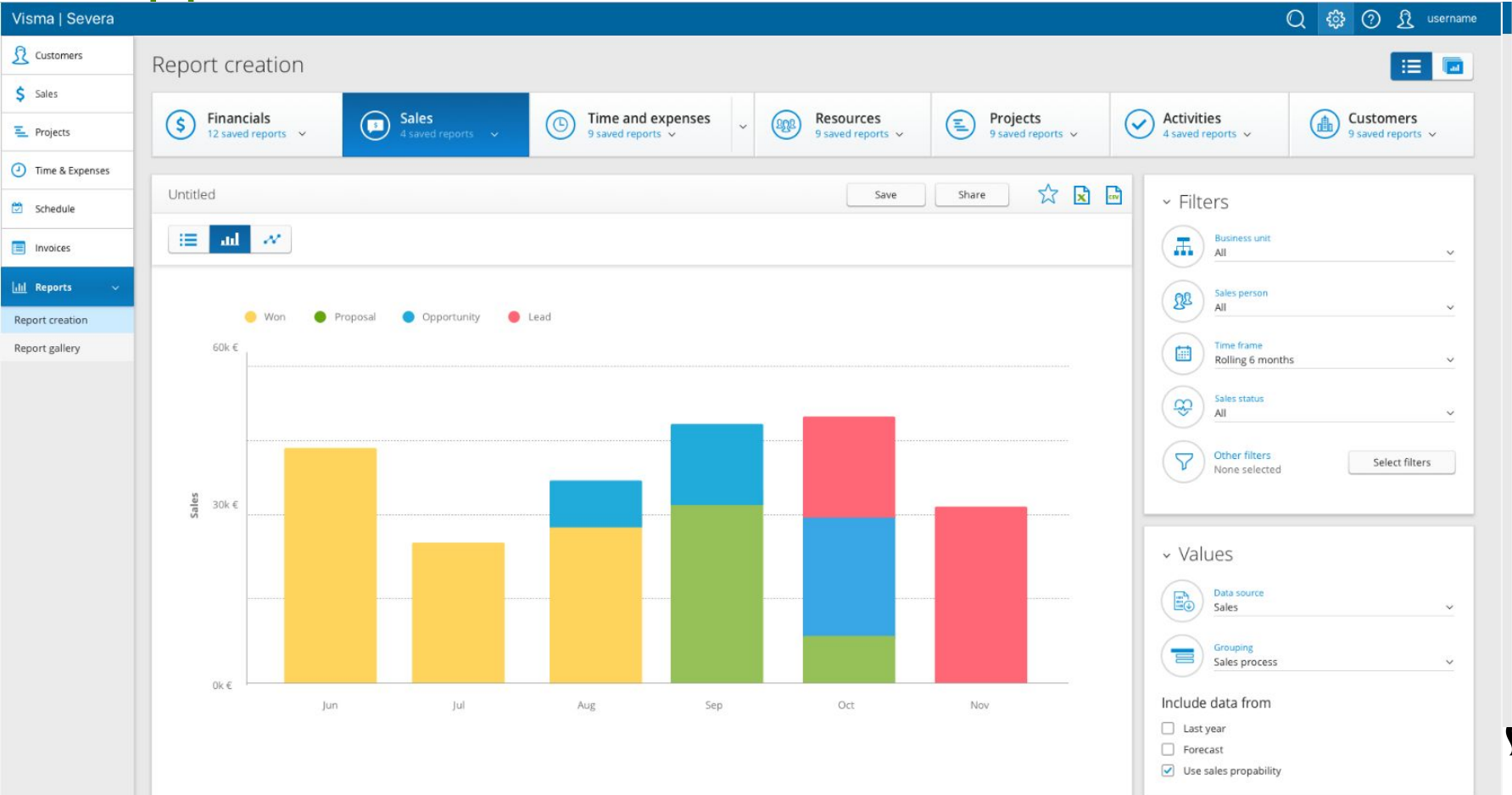
**Latest invoices**

#1672 Wuckertview 284,38 €  
 #1671 Lake Clotilde 145,05 €  
 DRAFT North Rowan 139,95 €

1 item selected
Bill later
Make non-billable
Edit original



# Rapporter



# Roadmap

Integration med andra Visma-system

E-postintegration för CRM-hantering

Notifieringar

Utökade rapportmöjligheter

Utökad funktionalitet för delning av projektinformation (samverkan)

...

# Tidsaspekt och nästa steg

- Piloter under april
- Tillgänglig våren 2017
- Ingen migrering - molnbaserad lösning
- Övergångsperiod båda versionerna
- Alla kunddata och egendefinierade rapporter kvar

# Löpande information

- Löpande uppdatering med information på vårt kund-community
- Ställ frågor på vårt kund-community - fler undrar säkert samma sak
- Under våren kommer
  - Fler webinarier
  - Dokumentation
  - Filmer
  - ...



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Respect  
Reliability  
Innovation  
Competence  
Team spirit