

Planhat Features

March 17, 2025



Data

Know more, faster.

Time Series

Analyse and action on change over time

Data Models

Model your data objects after your business

Import & Export

Move thousands datapoints in a single click

Health Lab

The beating heart of Customer Success

Revenue Analytics

Real-time GTM reporting you can trust

Group Structures

Reflect groups and aggregate data up them

Flexible API

Fast, powerful connections for developers

Search

Search everything, biased to recent actions

Data Filtering

No code advanced cross-model querying

Field Rules

Seamlessly enforce important processes

Properties

Your commercial building blocks

Access Control

Ensure granular data privacy and security

Private Apps

Build your own flexible data flows

Native Integrations

Unify data across teams and use cases

Feeds

Host real-time conversations with context



Application

Routing done right.

Portals

A curated space for customer collaboration

Pages

Work with any type of data and content

Global Templates

Get started with best-practices in minutes

Home

Work from your own personalised interface

Automated Hygiene

Keeping Planhat tidy behind the scenes

Live Collaboration

Real-time multimodal collaboration

Mentions & Object References

Comment to connect data and collaboration

Comments

Chat directly where the work happens

Data Explorer

Find answers quickly, without adding noise

Home Templates

Enable teams with a templated interface

Custom Object Profiles

Configure data objects for maximum focus

Dashboards & Widgets

Visualise and report on any data



Action

Empower. Impact.

AI Automations

Automate anything with your preferred LLM

Project & Task Management

Plan, execute, and track projects with ease

Timesheets

Quickly log, track, and optimize time spent

Custom Connections

Consolidate all your data from any API

Code Editor

Build custom .js features and integrations

Notifications

Stay up-to-date with real-time notifications

Email Communications

Send personalized communications at scale

Automations

Minimize workload while maximizing impact



