



Manage the Complete Bid-to-Bill Process  
of Your Services Business

## NetSuite SuiteProjects



SuiteProjects is a Professional Services Automation (PSA) solution natively built on NetSuite. SuiteProjects combined with Customer Relationship Management (CRM), HR and accounting/Enterprise Resource Planning (ERP), provides a comprehensive single platform to run a services business. SuiteProjects quickly generates tangible results while driving increased resource utilization, elevating on-time project delivery, expediting billing cycles, improving invoicing accuracy, streamlining revenue recognition, reducing overhead and increasing visibility into your services organization.

### Key Benefits

- Streamline operations and drive profitability by optimizing the entire services business lifecycle.
- Faster project completion, better resource utilization, more accurate and efficient invoices.
- Increase visibility across your business, including forecasts, resources, projects and KPIs.
- Anytime, anywhere web and mobile access.
- Real-time reporting on key metrics such as project profitability and resource utilization.
- Gain real-time, global business management and financial consolidation.

For more information contact Protelo at 916-943-4428 or visit [www.proteloinc.com](http://www.proteloinc.com)

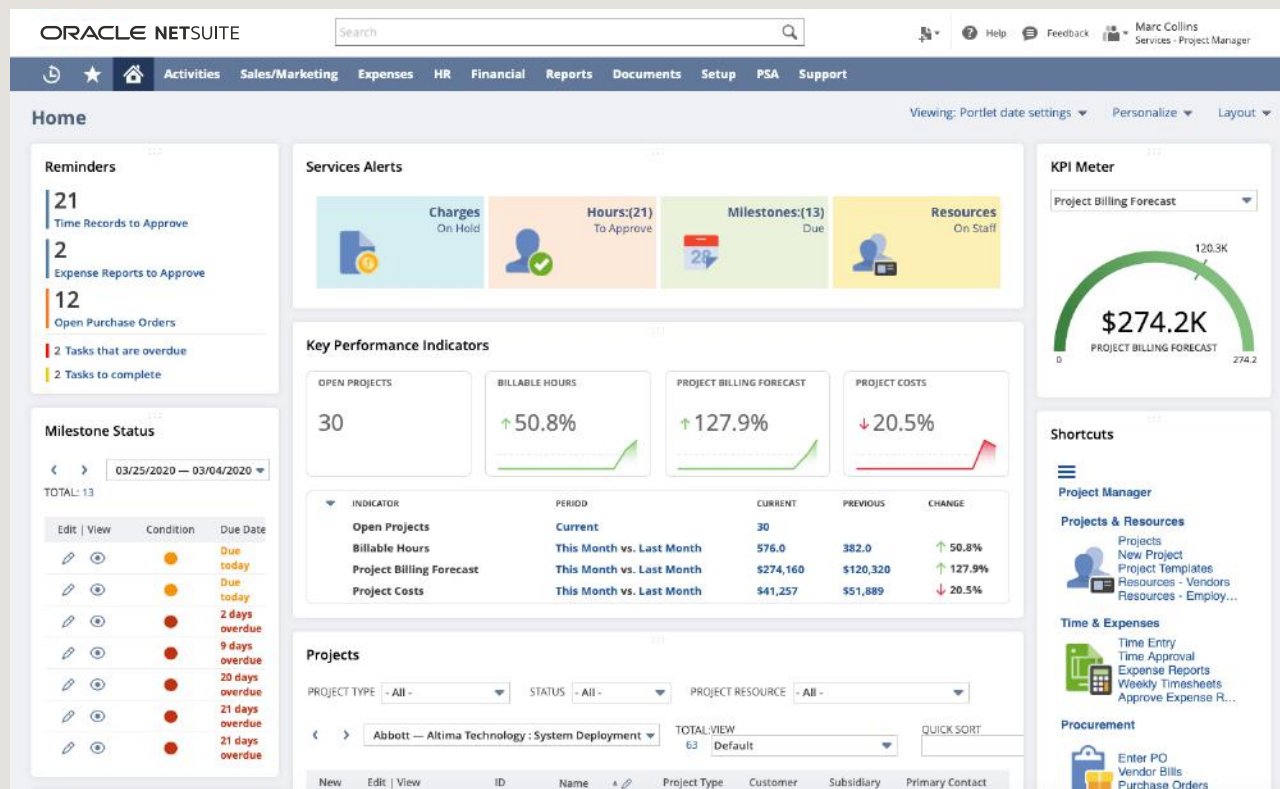
## Why SuiteProjects?

SuiteProjects helps services-based businesses complete projects more quickly, generate invoices accurately and efficiently, and speed accounts receivable cycles so you improve cash flow and eliminate revenue leakage. With SuiteProjects, you gain complete visibility into and control over your entire services business—in real-time, from the moment a new opportunity is identified through to project delivery, invoicing and revenue recognition, all while eliminating double entry, multiple systems and costly integrations.

## SuiteProjects Key Features

**Project Management.** Enable project managers and team members to collaborate on projects and maintain current and accurate project status at all times, allowing managers to proactively identify and resolve potential issues with each engagement.

**Resource Management.** Project managers can optimize staffing and utilization by minimizing bench time and ensuring that qualified resources are working on the right projects.



**Configurable dashboards and reporting** allow every manager real-time, personalized access to key metrics such as resource utilization, profit margins and project budget vs. actual.

For more information contact Protelo at 916-943-4428 or visit [www.proteloinc.com](http://www.proteloinc.com)

**Time and Expense Management.** Intuitive timesheets and expense reports enable users to quickly and easily capture detailed time and expense costs, whether in the office or on the road.

**Billing.** Billing and invoice management automates simple services invoices as well as complex recurring, time and materials, and fixed fee contracts. NetSuite provides flexible billing options—such as completing project work, achieving project milestones or according to a schedule of dates.

**Project Revenue.** Businesses with NetSuite Advanced Revenue Management can automate complex revenue calculations and allocations and support multiple revenue scenarios on a project-by-project basis.

**Project Accounting.** Connecting project activities with company financials helps ensure accurate accounting and billing throughout the project lifecycle and streamlines time and expense management while providing extensive project profitability reporting.

**Analytics.** Robust reporting and analytical tools deliver on-demand, real-time data, enabling you to monitor, report and analyze overall project performance in real-time.

**Anytime, Anywhere Access.** SuiteProjects cloud-based system empowers the mobile services organization supporting users where they work—on the go, at client sites or remotely.

**ORACLE NETSUITE**

Search

Activities Sales/Marketing Expenses HR Financial Reports Documents Setup PSA Support

**Resource Allocations**

Save Reset New Resource Allocation

Filter Resource Allocation Customize

**FILTERS**

EXPAND ALL COLLAPSE ALL 03/08/2020 Grid Chart Daily Weekly Monthly Abby Kwan - US Business Analyst Total: 24

Search Resource

Resource	Allocation
Adam Minister	33%
Bill Carr	2%
Bill Humber	31% 48%
Brian Sullivan	0%
Caitlin McGyver	12% 24%
Dale Muscat	100%
Ed Ellis	35% 25% 125%
Francis Murphy	83% 137%
Gary Jameson	100% 25% 125% 100%
Henry York	2%
Jack Gates	3%
James Farinaw	100% 200% 100%
Joan Kelly	100% 200% 100% 85% 185% 100%
Joanne Shukla	4%

**Resource Allocation**

Resource: Ed Ellis

Customer/Project: Global Information : Cloud connector

Start Date: 03/20/2020

End Date: 04/15/2020

Allocate: 152

Allocation Type: Soft

Comment: Need to confirm with client as Ed is already booked.

Recurrence: None

Greenwood Consulting : Data... 90 Hours

Altima Technology : ERP Integ... 76 Hours

Global Information : Cloud co... 152 Hours

**Increase resource productivity** with interactive resource management including skill sets, availability and robust resource searches.

For more information contact Protelo at 916-943-4428 or visit [www.proteloinc.com](http://www.proteloinc.com)





## Business Management for Global Services Organizations

Combine SuiteProjects with NetSuite OneWorld to manage multiple subsidiaries, business units, legal entities, global resource pools, billing rates in any currency, taxation rules, reporting requirements and more, providing unprecedented real-time visibility, resource management and operational control—all from a single system.

## Single Solution

SuiteProjects unites professional services automation functionality with CRM, ERP and HR to provide a complete solution for any business that provides services.

## Customer Relationship Management

NetSuite delivers powerful customer relationship management (CRM) capabilities, including sales force automation (SFA), marketing automation, customer support and service, and flexible customization. NetSuite CRM is the only CRM solution that is completely integrated with the back-office and project delivery, reducing manual entry and risk of error, and accelerating processes. This seamless integration ensures your business

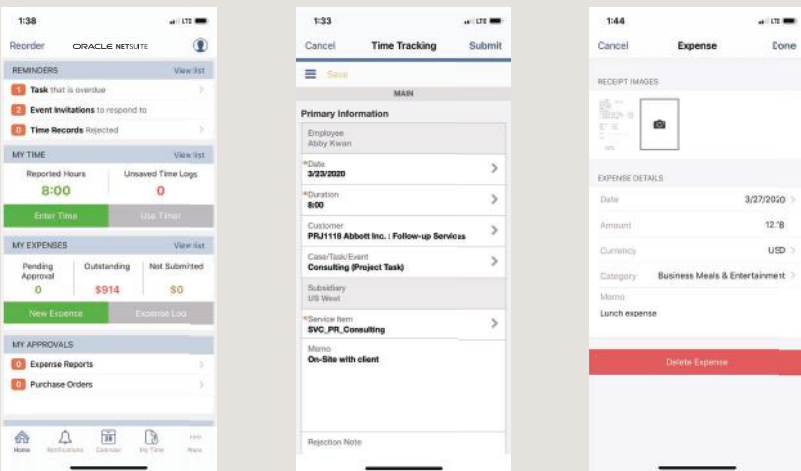
is operating on the same customer and project data and gives you real-time visibility into your client lifecycle, from lead to close and fulfillment.

## Financial Management and Forecasting

NetSuite Financials provides comprehensive financial/ERP capabilities that integrate with your back-office, sales and project delivery processes. NetSuite Financials takes your business beyond traditional accounting software and equips you with the visibility you need to make better, faster and accurate decisions.

## HR

SuitePeople offers capabilities for organizations to manage their HR and workforce management processes including employee new hires, onboarding, payroll, organization charts and compensation changes. Combined with SuiteProjects, employee time-off requests show the impact to project schedules, and businesses can track skill sets to properly staff projects and monitor upcoming vacation schedules to properly set availability. The unified NetSuite platform provides automation and visibility of the two main drivers of a services business, people and projects.



The image displays three mobile app screenshots. The first screenshot, titled 'Reminders', shows a list of tasks including 'Task that is overdue', 'Event invitations to respond to', and 'Time Records Rejected'. The second screenshot, titled 'Time Tracking', shows a form for recording time, including fields for Employee (Abby Kwan), Date (3/23/2020), Duration (8:00), Customer (PRJ1119 Abbott Inc.: Follow-up Services), Case/Task/Event (Consulting (Project Task)), and Service Item (SVC\_PP\_Consulting). The third screenshot, titled 'Expense', shows a form for recording an expense, including fields for Receipt Images, Date (3/23/2020), Amount (12.78), Currency (USD), Category (Business Meals & Entertainment), and Memo (Lunch expense). A red 'Delete Expense' button is visible at the bottom of the expense form.

**Stay current anytime, anywhere** with purpose-built mobile apps including easy time capture and expense receipts with picture attachments.

For more information contact Protelo at 916-943-4428 or visit [www.proteloinc.com](http://www.proteloinc.com)

© Oracle | Terms of Use and Privacy

