



# NetSuite

## Services Company Edition

### NetSuite Services Company Edition offers the industry's first and only:

- Role-based, customizable dashboards
- Integrated PSA, CRM and Accounting/ERP
- Integrated website

### NetSuite Services Company Edition features include:

#### • Customer Relationship Management

- Sales Force Automation
- Marketing Automation
- Customer Support and Service
- Incentive Management\*
- Offline Sales Client\*
- Partner Relationship Management

#### • Accounting/ERP

- General Ledger
- Accounts Receivable, Accounts Payable
- Advanced Financials\*
- Revenue Recognition\*
- Budgeting
- Multi-currency
- Order Management
- Purchasing
- Standard, Customizable Reports

#### • Professional Services Automation

- Advanced Project Accounting\*
- Advanced Billing
- Paperless Expense Reports
- Advanced Calendaring
- Activity Time Management
- Document Management
- Standard & Customized Reporting

#### • Website

- Database Driven Website
- Affiliate Marketing
- Customer Acquisition
- Customer, Partner Self-Service
- Website Analytics\*

#### • Employee Management and Productivity

- Role-based Dashboards
- Employee Records
- Expense Reporting, Purchase Requisitions
- Employee Self-Service

\*Some features sold in add-on modules

### NetSuite: The Integrated Application to Manage Your Services Business

With NetSuite Services Company Edition, your firm can manage your entire client service and business management processes with a flexible, powerful business application — integrating professional services automation, client relationship management, client service delivery, financials, ecommerce, and more. Now your service company can sell more to new and existing clients, manage your projects for high levels of service at lower cost, and manage your entire business for greater profitability.

Hundreds of services companies run their business on NetSuite—and we do too. Here's why NetSuite Services Company Edition is the best application for services firms:

#### • One Application to Manage Your Services Business

Services firms typically cobble together and then juggle several different business applications — and numerous spreadsheets — to manage the intricacies of the services industry. It's time to stop wasting precious resources managing multiple "silo" systems, NetSuite is the one intelligent, integrated, customizable application to unify your client management and business processes, increase visibility for better decision making, and extend processes to your clients for enhanced collaboration.

#### • One System — Complete Services Lifecycle Management

NetSuite manages the end-to-end lifecycle business processes in one system with marketing from suspect to lead, sales from prospect to proposal to contract, project tracking and billing throughout service delivery, support for products and services sold and upsell/add-on intelligence to ensure ongoing relationships with valued clients.

#### • Advanced Financials\*

With complex billing and revenue recognition, NetSuite manages the intricacies of services financial management and complex project accounting.

#### • One View of the Client

One integrated system (Accounting/ERP+CRM+Ecommerce+PSA) delivers a single, real-time view of the client across all projects, departments and locations.

#### • Built to Run a Services Company

NetSuite is designed from the ground up to run a services business.

#### • Software as a Service

NetSuite's on-demand model provides lower cost, more rapid time to production, and anytime/anywhere access.

#### • Client Collaboration

Client-facing processes extend self-service via the Client Portal.

#### • The World's Most Customizable On-Demand Solution

NetSuite is easily extended through SuiteFlex customization, Web services, and SuiteScript.

 Find out more: contact NetSuite, Inc. at 1-877-NETSUITE or visit [www.netsuite.com/services](http://www.netsuite.com/services)

## Key Advantages for Project-based Companies

### • Project Revenue Forecasting

Billing and revenue recognition are driven right from the contract stage via the sales order, giving services companies invaluable visibility into future revenue streams. Depending on the project type—for example, fixed bid versus time & materials—different revenue recognition templates can be applied to schedule revenue forecasts appropriately.

### • Cost Allocation to Projects

You can easily allocate all payroll costs to projects with one click without tedious manual calculations and duplicate data entry. Earnings and company contribution expenses are allocated for accounting purposes proportionately to the time entered for each project by the resources working that project. This allows for greater visibility into the impact of labor costs on project profitability as well as great accuracy when reporting on project profitability and income statements—key financial metrics for services organizations.

### • Contractor Self-Service Portal for Time Entry

Many professional service companies leverage contractors for portions of their project work. NetSuite offers a vendor self-service center to accommodate the needs of these contractors in a role-based model that ensures secure and confidential access. In particular, contractors can now login at any time to update the time they have spent on particular project tasks, which can in turn be billed to the customer or dealt with under the guidelines of the project type.

### • Improved Project Management and Flexible Project Profitability Reporting

For more effective tracking and reporting of project status, detail-level work tasks can now be rolled up into higher-level summary tasks. Summary tasks track the start and end dates, along with various time budget measures such as initial, current and actual time on a roll-up basis. This allows for easy, at-a-glance progress tracking when viewing a particular project and its associated tasks. In addition, line-listed summary tasks can be useful in numerous aspects of project reporting such as backlog and utilization reporting.

### • Time & Expense Custom Workflows and Routing

In professional service organizations, the project manager generally signs off on any time or expenses booked against the project, even when the resources working the project do not report directly to him or her. To accommodate this matrix reporting structure, project managers can be incorporated into the Billing Time Approval process as well as the Expense Billed Approval process for projects they manage. Different routing can

be applied to other approval processes, such as Purchase Orders, based on direct reporting hierarchy or special department head approval with spending limits taken into account.

### • Streamlined Time & Expense Entry

For the service personnel who act as resources on a project, the task of entering their time and expenses incurred on a weekly or more frequent basis can be an onerous and tedious task. NetSuite streamlines this process by eliminating the need for duplicate data entry and personalizing the choice of customers and projects available to book time and expenses against to just those that the services person is assigned to as a resource. Project managers also have increased control over when a resource can book time and expenses against a project based on the current project phase. For example, once a project is complete and fully billed, it can be locked so that no additional time or expense entries can be made against that project.

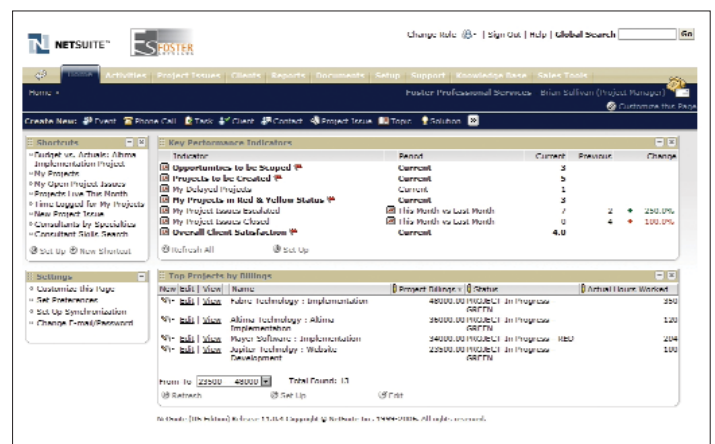
## The Ultimate Business Dashboard to Manage Your Client-centric Business

From senior executive or partner, through project manager, to technical consultant, NetSuite gives you role-specific Dashboards for real-time visibility into services forecasting, revenue, status of projects, project alerts, client support incidents and more. Dashboards help service-based companies keep a finger on the pulse of their business, freeing individuals to focus on the client to garner their business, deliver on promises, manage the engagement for profit and maximize client service.

The dashboards for Service Providers include:

### • Key Performance Indicators

KPIs, with tailorable period comparisons and out-of-tolerance notifications, give you a real-time, at-a-glance view of your projects and your company's performance.





- **Real-time Visibility**

Real-time visibility of projects status, utilization, realization rates, support issues and more.

- **Tailored Reporting**

Saved queries give users rapid, repeatable ad hoc reports right on their dashboard.

- **Group Calendaring**

Calendars for individual and group scheduling.

- **RSS Content**

RSS content feeds from your choice of providers.

- **Direct Drill-Down**

Real-time updates, direct drill down to greater detail and transaction management directly from the Dashboard.

## The Best CRM for Services Companies

CRM can make or break a services company, and a top analyst firm recently ranked NetSuite CRM services #1 in Sales Management, Forecasting, Opportunity Management and Dashboards. Why? Unlike standalone CRM applications, NetSuite CRM services is seamlessly integrated with financials and your back office systems, giving you a 360 degree view of the client.

- **360 Degree View of the Client**

One integrated system (Accounting/ERP+CRM+Ecommerce) delivers a single, real-time view of the client across all departments and all locations.

- **True Marketing ROI**

With closed-loop marketing, you can see revenues, costs and ROI for all campaigns in real-time.

- **Complete Lead to Contract**

NetSuite manages the complete lead to order process in-system.

- **Services Item Catalogue**

NetSuite' Service Item Catalogue lets you organize your portfolio of service offerings, facilitating the sales process. As prospects move to preferred clients, you can provide standard pricing to target segments and personalized pricing for recurring and contracted services. The Service Item Catalogue also manages discounting rules for accounts contracting volume or multiple services.

- **Complete Contract to Cash**

NetSuite automates the complete order to cash lifecycle with integrated order management serving as the critical pipeline between client facing CRM, PSA, and back office Accounting/ERP and financials. Order management integrated with Advanced Billing allows you to accurately account for projects. It also provides histories for inquiries, support and upsell and cross-sell of products and services.

- **Multiple Forecasts**

You have visibility into multiple forecasts, such as calculated, upside case, base case, downside case, and override, enabling you to easily, accurately triangulate forecasts.

- **Integrated Commissions**

NetSuite is the only Web-based CRM system to offer commissions tracking, which is critical for motivating sales teams through real-time visibility, reduced errors, and accurate, timely payment. Managed in-system, integrated commissions reduce overhead in sales operations, and eliminates shadow tracking by sales representatives.

- **Self-Service Client Centers**

Client portals provide password protected self-service access to project history, outstanding invoices, and support which provide greater service at lower cost.

- **Upsell/Cross-sell**

Automated upsell and cross-sell functionality improve the lifetime value of clients through add-on services sales.

## Complete Financials with Advanced Billing

Financials are complex in any industry and they are quite complex in the services industry. The stumbling block for most services companies is managing billing schedules, and ensuring compliance. Few financial packages provide these tools, forcing companies to manage these complexities offline in spreadsheets or in third party standalone packages. With NetSuite you have one financial system that manages accounting and complex billing — so there's no more double entry.

- **Advanced Billing**

NetSuite automates complex billing schedules and gives you complete visibility into future billings and cashflow. Once contract terms are set up in NetSuite, invoices are automatically created based on those terms. Advanced Billing supports multiple billing models including milestone, time and expense, percent complete, fixed fee, and more.

- **Revenue Recognition**

NetSuite supports broad revenue recognition capabilities, important to many services companies, including percent complete allowing companies to recognize revenue in conjunction with the completion of a project. NetSuite also supports Sarbanes-Oxley compliance with Section 404. Software companies can even manage both GAAP revenues and billings separately — a critical operation in many service companies.

- **Deferred Revenue Management**

NetSuite lets you recognize deferred payments within regulations and guidelines, all within NetSuite financials. Deferred revenue reports deliver detailed data on both posted and forecasted

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revenue. NetSuite gives you easy access to detailed historical and future views for more accurate business management and planning.

- **Pricing**

NetSuite makes it easy to manage sophisticated pricing models. NetSuite supports standard, volume, promotional, client, industry specific pricing, and more in an easy-to-manage matrix.

- **Revenue Forecasting**

NetSuite takes the guess work out of revenue forecasting. With all aspects of revenue management managed in NetSuite, and not offline in spreadsheets and third party systems, your revenue forecasts will be based on consolidated, real-time data for accurate, confident forecasting. Unlike standalone CRM solutions, NetSuite lets you see revenue from both your sales pipeline and existing client base.

- **Multiple Budgets**

Business applications sold to small and midsize firms rarely provide budgeting tools for the real-world financial planning complexities they face. NetSuite's budgeting tools address those needs with multiple budgets for tracking different scenarios, the ability to easily create new budgets from existing budgets or even from actual results and more customizable budget reports. And in order to provide maximum flexibility, firms can work on their budgets offline in a spreadsheet and import the results into NetSuite.

- **GAAP & Regulatory Compliance**

As a single application with a complete set of audit trails, NetSuite makes it simpler to maintain compliance with GAAP, FASB, SEC, and AICPA regulations and standards. NetSuite facilitates Sarbanes-Oxley Section 404 compliance by supporting internal controls, providing accurate, timely reporting and supporting individual accountability through a complete audit trail of all processes and every transaction.

- **Complete Financials Foundation**

NetSuite accounting includes full General Ledger, Accounts Payable and Receivable, multiple budgets, multi-currency, online bill pay, allocations, and multi-company consolidations all with real-time reporting. Now you can manage your entire financial entity in one system. NetSuite's integrated financial management greatly improves the productivity of finance departments in service companies. Greater efficiency from integration, real-time tracking and reports, and auditing tools reduce the overhead that typically burdens services companies.

- **Complete Procure-to-Pay Purchasing**

NetSuite lets you move from manual, paper-based purchasing to lower cost, higher control automated purchasing. NetSuite streamlines purchasing — saving you money that goes straight to your bottom line.

- **Standard and Customized Reporting**

NetSuite provides standard reports to track your project, your portfolio of projects and the business management of your firm. Streamlined customization quickly puts the precise information you need to make smarter faster decisions at your fingertips.

- **Full Application Integration**

NetSuite is a process-centric application that operates in real-time. It has been built from the ground up as a single integrated application that is highly modular. It meets the specific needs of service companies large and small.

### Professional Services Automation

Services firms typically perform project management and administration in standalone software packages including Microsoft Project, Excel and homegrown tracking and document management systems. This creates silos of information and error-filled, laborious administration resulting in inefficiency and frustration to both staff-and your clients. NetSuite integrates your project tracking and administration seamlessly with your front and back office applications for clear lines of visibility within and across projects for internal teams and for your clients. This results in greater collaboration, cost efficiency and client satisfaction.

- **Project Tracking**

NetSuite Services Company Edition lets companies manage multiple types of projects including time and materials, fixed price, and cost plus projects. Teams can create project jobs and link them to specific customers. You can even create sub-jobs. All project job records include start dates, estimated end dates, percentage of work completed, actual end dates, as well as all income and expenses associated with each project. You can view time budgeted versus time spent as well as team utilization. NetSuite also organizes tasks, calls and events, linking them to specific projects. Information regarding clients is managed in one place so resource tracking is complete and real-time for ever-improving client service and can be segmented and leveraged for smarter client intelligence.

- **Paperless Expense Reports**

NetSuite provides self-service, paperless expense reports with approval workflow and optional payment.

- **Advanced Calendaring & Activity Time Management**

Delivering powerful group calendaring capabilities, NetSuite lets users share calendars, develop schedules per project activity, and monitor assets, all of which help business processes flow more smoothly. Individuals are empowered to manage their schedules more effectively, while managers have full visibility into the activities of their employees on an individual, or team per project basis.

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### • Document Management

NetSuite provides document management that electronically organizes and stores content on a per-client, project, or aggregate basis. Additionally, it can be published internally via your Intranet and externally to your Web site or client and partner centers. All content is based in a central File Cabinet where shared folders and sub-folders can be set up for a plethora of file types including Word, Excel, PowerPoint, PDF, and many more. Storing these documents online rather than on the computers of numerous employees means that access to them can be restricted as appropriate on a per client, per project, or department basis. Personnel with the necessary access rights can then work on them from multiple locations such as home, another office, the client site or even a hotel when traveling. The security of NetSuite applications is safer than e-mail, and the File Cabinet even automatically logs when the file is modified and by whom so a complete audit trail is always maintained.

### Integrated Back-Office with Services-Specific Features

NetSuite lets you manage the complex back office within one system.

- Paperless expense reports
- Employee management
- Real-time processes, intelligence
- Payroll Services

### Deep Support Functionality

Quality of services and support can make or break a services company—both early on during implementation and over time for client satisfaction and retention. High levels of service can be costly, and that's why NetSuite gives you the tools and a choice of channels to provide the right level of service to the right clients at the best cost.

#### • Multi-channel Service

Superior multi-channel service with all client interactions—live, online, e-mail and in-person—are tracked to a single client record.

#### • Client Center

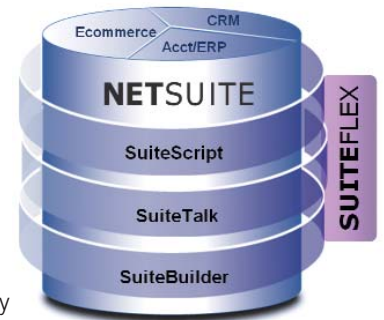
NetSuite's self-service Client Center gives clients low cost, high availability service 24/7 around the globe.

### SuiteFlex: Your Business, Your Suite

SuiteFlex is the technology platform for customization, verticalization, and business process management within NetSuite. SuiteFlex gives customers, partners and developers all the tools they need to easily customize all aspects of NetSuite.

### You Can Tailor NetSuite to Meet Your Exact Business Requirements

- Personalize roles to optimize individual and team productivity
- Customize end-to-end business processes to your precise company and industry requirements
- Build the new functionality, workflows and processes your business demands
- Connect to legacy and third party applications and content providers



### SuiteFlex combines four tools for customization, verticalization, and business process management:

- **SuiteScript:** Build new functions, processes, and entire applications and host them in NetSuite.
- **SuiteTalk:** Seamlessly extend NetSuite to legacy systems and third-party vertical applications.
- **SuiteBuilder:** Personalize and configure NetSuite with easy-to-use, point-and-click tools.
- **SuiteBundler:** Create customized applications for other NetSuite users.

### SuiteFlex Benefits

- **Unlimited Customization.** No more settling for a “one size fits all” hosted application solution. SuiteFlex transforms NetSuite into your company's software, complete with your terminology, your functions and business processes.
- **Easy Verticalization.** Verticalization to your industry-specific needs has never been easier.
- **Open.** Standards-based Web Services make it simpler to extend NetSuite to other systems, vertical solutions, and third party add-on capabilities.
- **Reliable.** Applications you build using SuiteFlex are hosted within NetSuite—which comes complete with a 99.5% uptime guarantee, robust Oracle & J2EE architecture and world-class security infrastructure.

### No On-Demand Application Service Is More Customizable or Extensible

SuiteFlex makes NetSuite the world's most customizable and extensible on-demand application service, delivering unique capabilities not found in any other on-demand solution.

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- SuiteBuilder overcomes the hurdles of customization, allowing users to focus on “Click Not Code.” Configuration capability is point and click enabled for everything from simple database field additions to form customization to complex, data object manipulations.
- Many-to-many data relationships between both standard and custom records and objects give you complete flexibility in managing additional mission critical data.
- Customize, automate or create new business processes that fit your needs using SuiteScript.
- SuiteTalk extends and integrates your NetSuite application while maintaining full data integrity and enforcing application logic.
- In-depth support for Accounting/ERP and CRM objects using uniform APIs makes it easy to reuse your integration tools and resources across distinct business functions.
- Suitelets, the latest addition to the SuiteScript family, encompasses all previous customization and scripting functionality into a new set of APIs, giving you an unprecedented platform to invent and deploy new applications hosted by NetSuite.
- Use Suitelets to create and blend custom user interfaces with NetSuite core and custom objects to create web pages or backend processes on the fly.
- Custom color themes, company logo placement and custom terminology allow NetSuite to be stamped with your corporate brand and help personalize NetSuite to your business and industry.

### High-End Customization without the Headaches

NetSuite addresses a major shortcoming of traditional application customization by automatically carrying forward customizations with each new release. Most mid-market or enterprise products are highly customizable — but at a high cost. The customization typically requires significant consulting resources since many of the systems’ customizations must be made via product-specific programming language.

Customization of these systems is typically complex to install and even more complex to upgrade. The bane of customizations has long been the requirement for specialized migration and maintenance, thus making any upgrade an expensive time and resource-consuming drudgery. Consequently, companies all too often postpone upgrades as long as possible, or even to make the decision to switch to alternate products or platforms rather than upgrade.

NetSuite’s approach extracts the data and metadata for customizations from built-in functionality. This enables companies to have seamless customization migrations handled by NetSuite so you can carry forward your changes with the latest capabilities of NetSuite — without cost, and headache free.

### Amazingly Affordable

NetSuite provides dramatic cost savings relative to other combinations of front-office, professional service automation and back-office applications. Services firms derive savings from both the single integrated suite and from the Web-based delivery method.