



# NETSUITE PLANNING AND BUDGETING

Integrated Planning, Budgeting and Forecasting

NetSuite Planning and Budgeting is used by companies worldwide to meet organization-wide business planning needs. It is designed to address a wide variety of financial, sales, contractual and operational planning use cases across multiple industries, and is accessible via rich interfaces through Web or Microsoft Office.

## Key Benefits

- No hardware or IT investments.
- Fully customizable and owned by Lines of Business.
- Migrate from disconnected planning tools and spreadsheets.
- Work with latest version of the software.
- Multiple environments and global data centers for deployment.
- Low cost and time to implement.

## Integrated Organization-Wide Planning and Budgeting Process

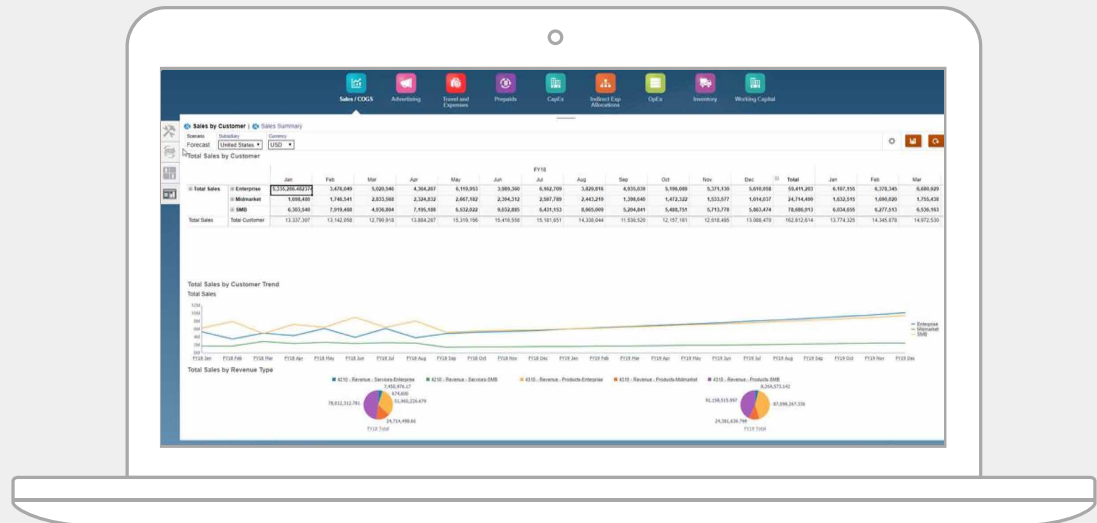
Planning and budgeting using spreadsheets in most organizations results in less collaboration, more inefficiency and is error prone.

NetSuite Planning and Budgeting facilitates both company-wide and departmental planning with modeling capabilities, approval workflows and reporting within one collaborative scalable solution. Sales and operationally driven strategic plans can be linked to long-term and near-term financial plans. The solution uses a powerful calculation engine which can accommodate a wide range of business logic with fast in-memory aggregation and instant analysis and reporting.

## Key Features

- Intuitive, role-based web and MS Office interfaces.
- Flexible driver based what-if modelling capabilities.
- Built-in financial intelligence and spreading logic.
- Built-in commentary and annotation capabilities.
- Flexible workflow and plan management capabilities.
- Robust reporting and ad-hoc analysis with formatting and charting support.
- Integration with NetSuite Financials.

**Dashboards** provide business users easy access to information.



## Robust Modelling with Sandboxing and Predictive Analytics

Demand is volatile, costs fluctuate and the business landscape is constantly changing. NetSuite Planning and Budgeting enables the ability to stay ahead of the competition by understanding volatility and modeling financial and operational changes quickly using flexible assumptions. Use sophisticated modelling techniques, predictive analytics, multiple what-if scenarios and rolling forecasts to minimize uncertainty in the business.

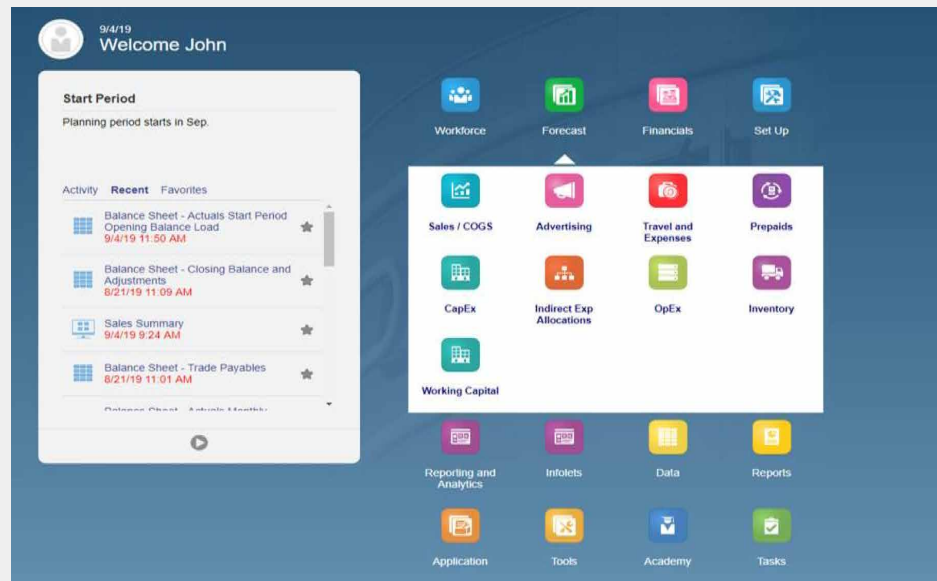
## Connect Users with an Intuitive, Mobile-Ready User Interface

The NetSuite Planning and Budgeting interface allows users easy access to view plans and reports on the web or their mobile devices. Robust dashboard and report creation capabilities are built-in for streamlined access to information.

## Smart View Benefits

- Quickly navigate plan versions and details in Excel.
- Full ad-hoc and free form analysis capabilities.
- Report creation in Excel, Word and PowerPoint.
- Data access from multi-dimensional sources.
- Create unique data perspectives for users.
- Dynamically refresh Office documents with a single click.
- Support for highly formatted grids in Microsoft Excel.

The mobile-ready and intuitive interface of NetSuite Planning and Budgeting combines task lists, instructions, dashboards and graphical reports.



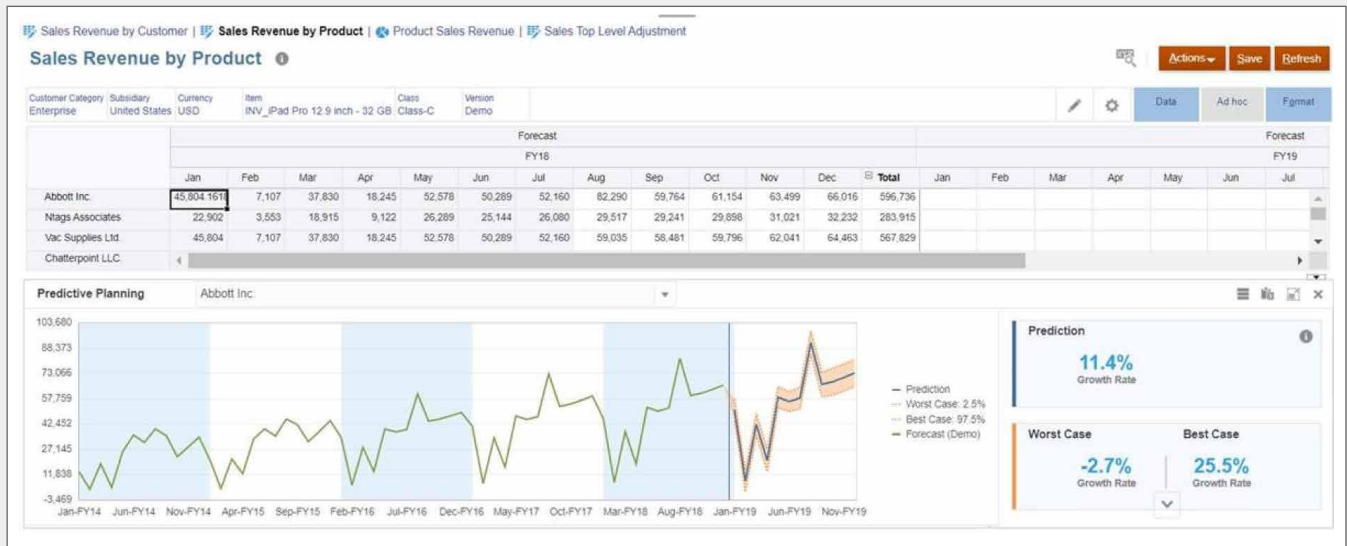
## Empower Users with Microsoft Office Integration

NetSuite Planning and Budgeting offers comprehensive integration with Microsoft Office tools such as Microsoft Outlook, Excel, Word and PowerPoint with Smart View for Office.

Use Excel as the environment for adding custom members on the fly, slicing and dicing data and ad-hoc modelling. Users can also create data grids incorporating Excel formulas and formats. Common planning actions, such as spreading and allocation, are available within planning data grids rendered within Microsoft Excel.

## Integrate Planning and Management Reporting Seamlessly

Reports and dashboards that display plan, forecast and actual data can be created in minutes and any change made to versions are instantaneously reflected.



**Predictive Planning** uses sophisticated time-series forecasting techniques to create new predictions or validate existing forecasts.

## SuiteSuccess Offerings for Planning and Budgeting

SuiteSuccess for Planning and Budgeting is available in two unique editions, intended for businesses in different stages of organization growth. Each edition provides a certain level of functionality, pricing and deployment speed so that you can clearly identify which edition is the best solution for your planning and budgeting requirements.

### SuiteSuccess – Planning and Budgeting Starter Edition

Planning and Budgeting Starter is designed with the small business in mind, providing a straight out-of-the-box planning and budgeting solution at an optimal price point. It provides the ability for smaller businesses and organizations to implement the core functions and benefits that Planning and Budgeting has to offer without over-inflating their operating expenses.

Business Size: <\$5 MM Revenue

Delivery Motion and Speed: 15-30 Days

- Planning and Budgeting Starter is implemented following our tried and tested “activation” process: a rapid implementation method that better enables your business and end users on a shorter timeline.

Features Included:

- Financial Reporting
- Variance Analysis & Reporting
- Trended Revenue/COGS Planning
- Trended OpEx Planning
- Balance Sheet and Cash Flow
- Smart View Office Integration

### SuiteSuccess – Planning and Budgeting Standard Edition

Planning and Budgeting Financials Standard Edition is intended for the organization that has reached a level where basic planning and budgeting solutions won't accommodate or facilitate future growth. This edition allows you to receive a necessary, Standard version of Planning and Budgeting but with the capability to lightly customize the solution to suit your existing operations.

Business Size: \$5 – 20 MM Revenue

Delivery Motion and Speed: 45-60 Days

- Planning and Budgeting Standard is implemented via the Oracle NetSuite Global Delivery Center. This talented team of consultants will align implementation objectives and timelines with your team, and will work hard to ensure a quick and smooth implementation of your new solution.

Features Included:

- All Planning and Budgeting Starter Edition Features Plus:
  - Price x Volume Revenue/COGS Planning
  - Driver-based OpEx Planning
  - Detailed Workforce Planning
  - OpEx Modules (T&E, CapEx, Others)

