Unleash The Power

Of Your Openair System With Top Step's Openair Scripts

OpenAir scripts build upon the great features of your existing OpenAir system with additional functionality to improve your PS operation, productivity, and process compliance.

We have a dedicated team of specialist who have developed over 290 scripts.

With each NetSuite OpenAir scripting project you will get:

- A Top Step specialist who will install and configure your OpenAir Script to your satisfaction
- Knowledge transfer for usage and administration
- Change management advice to ensure you get the most from your new OpenAir Script
- All done for you quickly — typically 1-2 weeks

Administration Scripts

- Add Newly Created Users To Multiple Filter Sets
- Add User Proxies To Admin Accounts
- Audit Of Sent Email Notifications
- Create Default Rate, User Entity Tags, Work Schedules, And Subsidiary For Users
- Create Leave Accrual Rules
- Identify Users With Populated Loaded Cost For Reporting
- Leave Accrual Balance True Up
- Missing Assignment Group Notification Email
- Populate Custom Fields On User Record
- Populate Schedule Request Notes From Imported Schedule Requests
- PTO Accrual Dates
- Set Account Wide Default User Preferences
- Set Custom Field(s) On Client Record
- Update User Entity Tags To Historical Upon User's Deactivation

Financial Management Scripts

- Add A Service Override To Project Billing Rule
- Add Administrative Fee
- Add Date Language To Invoice
- Add Notes To Invoice Based On Billing Cycle
- Add Phase Values To Invoices
- Add Start/End Dates To Charges
- Alter Over Cap Billing Rules To Add Multi Currency
- Batch Update Billing Rules
- Create Charges From New Bookings
- Create Charges That Match Hours Remaining
- Create Discount Credits As A Separate Charge
- Create Over The Cap Billing Rules
- Discount Charges
- Ensure Tax Location Is Blank For India Expense Reports
- Fixed Fee Revenue Allocation
- Fixed Fee Revenue Split By User
- Fixed Fee Split By Department
- Inactivate Billing Rules
- Managed Services Ratable Revenue
- Move Invoice Charges To Specific Charge Stage
- Overdue Invoice Late Fee Charge Creation
- Past Due Invoice Reminder Email
- PO To Invoice
- Populate Custom Fields On Invoiced Charges
- Populate Invoice Notes
- Retainer Billing Rules
- Rev % Complete
- Rollup Invoiced Charges
- Send Email Notification - For New Purchase Orders
- Send Invoice Approval Reminder To Project Owner
- Set Accounting Date On Unexported Invoices
- Set Client Invoice Layout For Header
- Set Rev Rec Rule Currency
- Set Revenue Rule
- Set The Expense Cap On Billing Rule
- Set User Job Code And Services On Manual Charges
- Added To Project: Script To Address Multiple Sales Orders
- Split Billing Rules
- Sync Customer Po And Billing Rules
- Task-Level Revenue Recognition
- Unroll Summarized Charges
- Update Cost Center From Department
- Update Cost Center On Receipts
- Update Cost Centers On Charges
- Weekly Revenue Creation
- Write Resource Cost Relief To Charge

Project Management Scripts

Activate & Deactivate Project Based On Project Stage
Add Milestones For New Projects
Batch Delete Project Transactions
Copy Parent Project Information For Sequential Child Projects
Copy Sales Order From Purchase Order To Project
Create Task Assignments From Bookings
Custom Budget Alerts For Hours/Expense Thresholds
Custom Notification On Remaining Monetary Budget
Date Moved To Complete Project Stage
Date Project's Percent Complete Was Updated
Deactivate Project(s) Upon Closure
Delete Bookings On User And Project Inactivations
Display Worked Hours On Project Properties
EAC Calculation
Ensure Invoice Approval Checkbox Is Unchecked For New Projects
Generate Unique Project ID
Identify When Projected Hours Exceed Cap
Import Bookings Into Budget
Limit Services On Task
Mandatory Notes Field On Certain Tasks
Master Project Fields To State Project Fields
Modify Project Name On Site Projects
Move A Project To Specific Project Stage After A Set Number Of Days
Move Project Stage On Events (Milestone Completion)
Move Projects To Ops Review Stage On Specific Task Change
Move Values From Client To Project
Notification Of Project Go Live
Notification Of Project Go Lives Missed
Overall Project Status - For Reporting
Parent Project
PM Notification: User Worked Hours > Assigned Hours
Populate Billed, Approved Hours On Project
Populate Budget Hours From Transactional Budgets
Populate Budget Hours With Booked Hours
Populate Business Line For Project Creation
Prevent Task Planned Hours From Being Exceeded
Project Budget Labor Cost Rate By Rate Card
Project Percent Complete
Project Stage Change Audit For Reporting
Project Stage Change Email Notification
Recreate Task Duplication
Secondary Cost Override At Task Assignment
Set Budget Status
Set Hierarchy Node On New Projects
Set Rate Card From Project Property
Set Stage Based On Project Custom Checkboxes
Set Task Dates Based On Bookings
Sum Up Budget Hours
Sync Task Type And Nonbillable Box
Take % Time Budget, Calculate And Net Of Rev Already Taken
Task Budget Alert
Task ID Prefix For Designated Projects
Timestamp On Closed Stage
Truncate Bookings Upon Task Completion
Update Custom Fields (Project Owner, Approver, Project Manager Etc.)
Update Practice On Project Properties (Custom Field)
Update Task Dates To Match Bookings
Use Percent In Booking Creation From Task Assignment
Validate Project Setup Includes Subordinate Objects
When Project Stage Is Updated Timestamps
Write Hierarchy Node ID Value To Project Custom Field

Resource Management Scripts

Create Bookings For Generics

Create Bookings For Holidays

Create Bookings From Schedule Requests

Create Bookings From Task Assignments

Email Weekly Notification Of Team Bookings

For PTO Hours Of User

Limit Tasks On Bookings

Populate Booked Resource Names With Color Coding

Remove Bookings From Unapproved Schedule Requests

Staffing Request Booking Type Update

Update Project Booked Utilized Hours To Account For PTO Hours Of User

User Booking History For Reporting

Time & Expense Management Scripts

Auto-Populate Holiday Hours On Timesheets

Create Expense Reports (Vendor Bills) From

Create Time Entry Export Records

Create Time-Off Accruals For Employees Reaching Years-Of-Service Milestones

Custom Job-Code Description(s) On Time Entries

Custom Task Type Check Boxes On Timesheet

Daily Timesheet Validation

Default Location For Timesheet Entry

Delete Designated Expense Reports/Receipts And Timesheets

Delete Duplicate Timesheet

Email PM When Schedule Request Is Approved

Enforcing Timesheet Notes | Description For Certain Tasks

ER Approval

Expense Report Mileage Calculation

Expense Report Split By Period

Export Personal Expenses To NetSuite

Mark Receipts Billable Based On Expense Item

Mark Timesheets Exported

Meal Cap Charge Creation

Notify On 80% Expense Cap

Populate Country/Subsidiary Field On Expense Reports

Populate Expense Account On Receipts

Prevent Holiday Task Time Entry On Non-Holidays

Prevent Submission Of Receipts With Notes Over 999 Characters

Prevent Time Entry On Task Where The Time Exceeds Planned Budget Hours

Prevent Time Entry On Task Where The User Is Not Booked

Prevent Time Entry Past Last Booked Date

Prevent Time Submission For Closed Accounting Periods

Project/Task/Expense Item Copy Across Receipts

Provide User Timesheet Status And List Of Needed Approvers For Reporting

Refuse Negative Hour Entry On Timesheets

Reinstate Deleted Expenses

Reminder Email For Rejected Timesheets

Remove Auto-Created Time Entries When Allow Time Checkbox Is Unchecked

Remove Zero-Hour Time Entries From Timesheets

Restrict Reimbursable Status On Expenses

Review Partial Month Timesheets To Populate Bookings

Set Accounting Date For 1099 Time And Expenses

Set Closed For Timesheets Checkbox

Set Time Entry Notes Requirement On Task

Split Receipts Without Attachments Into Separate Expense Report

Submit | Approve Inactive User Timesheet(s)

Time Entry Conversion From Charges Into Hours

Track Late Timesheet Submissions For User Reporting

Unsubmitted Amex Receipt Notification

Vendor Time To Expense Reports

Integration Scripts

- Create Entity Tags For NetSuite Users
- Hubspot Integration
- Integrate Netsuite Expenses Into Openair
- JIRA Integration
- Mark Salesforce Synchronization Checkbox
- Populate Additional NetSuite Fields Into Client Or Project Properties
- Populate NetSuite Parent ID
- Pull Project Name Into Contract ID Field In NetSuite
- Read Invoice & Expense Report Dates For NetSuite Export
- Salesforce Integration
- Slack Integration
- Workfront Integration Calculations

Don't Find What You Need?

Top Step will partner with you to design and implement a script that meets your needs.

We will:

1. Business Requirement Definition
   - Identify the business need in processing, communication, automation, etc.
   - Confirm standard OpenAir functionality is not already native in the platform.
   - Highlight desired behavior resulting from a custom solution.
2. Scope, Design, and Confirm
   - Scope a custom solution leveraging available OpenAir tools and add-on products.
   - Consider boundary conditions, error handling, volume processing, and feature dependence.
   - Evaluate end user impact and 'workarounds' that could possibly be used by end users which undermine end goal achievement.
3. Develop and Accept
   - Develop the custom solution in a test environment.
   - Establish use case and testing scenarios to confirm performance, design, error handling, and more.
   - Confirm requirements are met.
4. Deploy and Monitor
   - Support migration to a production environment with live data.
   - Assist with data alignment needs and system outage coordination.
   - Establish monitoring activities to ensure continued success.

About TOP STEP

Top Step improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business. Our experts have extensive experience in professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research and have been ranked as one of the fastest growing companies by Consulting Magazine and Inc. 5000.

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