



## From Quote to Project in Minutes

### The Only CPQ Solution Built Specifically for Professional Services Organizations Using SuiteProjects Pro

Professional services teams spend days assembling quotes in spreadsheets, chasing approvals, and manually re-entering data into SuiteProjects Pro. By the time a proposal lands, the competitor has already won. QuoteBuilder eliminates the bottleneck — completely

#### 5 Steps to Winning More Proposals

**Pick a Template** — Choose from pre-built service templates with tasks, resources & pricing baked in.

**Adjust Scope** — Tailor scope to each client. Hours & costs auto-calculate as you adjust parameters.

**Set Pricing** — Lock target margin, rate, or cost. Run what-if scenarios instantly.

**Send Proposal** — One click produces a polished branded proposal with scope, pricing & work breakdown structure.

**Launch Project** — Approved quote auto-creates the project in SuiteProjects Pro. Zero re-entry..

#### Everything You Need to Win More Business

- **Service Templates** — Reuse your best quotes. A library of service templates — tasks, resources, and pricing baked in — ensures every rep quotes consistently and quickly.
- **Smart Pricing** — Real-time margin and rate calculations. Lock margins, apply discounts, blend fixed-fee and T&M; models. Run what-if scenarios in seconds.
- **Instant Proposals** — One click produces a polished, client-ready PDF — branded cover, detailed scope, pricing tables, terms, and full work breakdown structure.
- **Approval Workflows** — Multi-level routing by deal size, discount %, or margin. Automated notifications keep deals moving; every approval is tracked and auditable.
- **Seamless Integration** — The ONLY CPQ built natively for SuiteProjects Pro. No middleware, no sync issues. Approved quotes become live projects — instantly.
- **Fast Setup** — Live in 3–4 weeks, not months. Includes template creation, rate card integration, team training for up to 10 users, and 30 days of post-launch support.

Word From Ronn Breux  
CEO, at Top Step...

“After 17 years of implementing SuiteProjects Pro, we’ve heard one consistent pain point from virtually every client: the disconnect between quoting and project delivery. QuoteBuilder represents our commitment to solving real business challenges with practical, powerful solutions.”

## Implementation & Support

Up and Running in Weeks, Not Months

### Week 1: Foundation

Configure service templates Import rate cards. Set approval rules.

### Week 2: Training Week

Team onboarding (up to 10 users). Process optimization and Template refinement

### Week 3: Go-Live

Full system launch. Support handoff. Success monitoring.

# QUOTE Builder

For SuiteProjects Pro

## Schedule a Demo

Ready to take your NetSuite SuiteProjects Pro experience to the next level and build quotes more quickly and accurately? QuoteBuilder is the solution you've been looking for. With its seamless integration, robust feature set, and proven track record, QuoteBuilder empowers organizations like yours to revolutionize your proposal process. Schedule a demo and see firsthand how QuoteBuilder can transform your proposal process and streamline your project setup once you have won!

## Frequently Asked Questions

### How is QuoteBuilder different from generic CPQ?

Generic CPQ tools are built for product companies. QuoteBuilder speaks

professional services — roles, phases, utilization, billing rules. And it's the only CPQ with native SuiteProjects Pro integration.

### Do I need to change my SuiteProjects Pro setup?

No. QuoteBuilder works with your existing rate cards, resource roles, and project templates. We enhance what you have, not replace it.

### Can it handle complex pricing models?

Yes — fixed fee, T&M, retainers, phased projects, milestone billing, and blended models. Lock margins, set rates, apply discounts.

### How secure is it?

QuoteBuilder inherits SuiteProjects Pro's enterprise security. Your data stays in your NetSuite environment. SOC 2 Type II, SSO, role-based access, full audit trails.

## About Addolution

Addolution, a Top Step partner, revolutionizes NetSuite SuiteProjects Pro with 17+ years of expertise in SuiteProjects Pro (formally OpenAir). Leveraging NetSuite SuiteProjects Pro's extensible architecture, Addolution develops powerful add-ons like CollabCenter to maximize PSA value. Through innovation and partnership, Addolution delivers transformative solutions benefiting NetSuite SuiteProjects Pro users and the NetSuite SuiteProjects Pro ecosystem.



## About TOP STEP

Top Step is a leader in optimizing business efficiency for Professional Services operations, dedicated to helping clients achieve their profitability goals while focusing on business growth. With extensive expertise in professional services business operations, professional services automation (PSA), and project management, Top Step has proudly served over 400 global organizations. Its commitment to excellence has earned recognition as "Best of the Best" by SPI Research and Oracle NetSuite for Exceptional SuiteProject Pro Product Expertise. Visit [www.topstepllc.com](http://www.topstepllc.com) to explore how Top Step can elevate your operational excellence.

