

Connect SuiteProjects Pro to NetSuite Expenses

SuiteProjects Pro's out-of-the-box SuiteConnect service allows the synchronization of Expense Reports from SuiteProjects Pro to Netsuite, but it does not allow expense reports originating in NetSuite to transfer to SuiteProjects Pro. This integration is built to solve that specific business problem for clients whose expenses either originate in NetSuite or are integrated into NetSuite from a 3rd-party expense tool (Concur, Expensify, etc.).

What Data Is Exchanged?

Expense Categories are first synchronized between SuiteProjects Pro and Netsuite, followed by Approved Expense Reports. Fields within the Expense Receipts can be included in the integration with Netsuite.

In addition to this, logic can be used to filter or map the Expense tables to respect Netsuite Classification structure.

Common Questions

Do I need a middleware product To send NetSuite expense reports to SuiteProjects Pro expense reports?

No.

Can I only integrate expense reports for professional services employees?

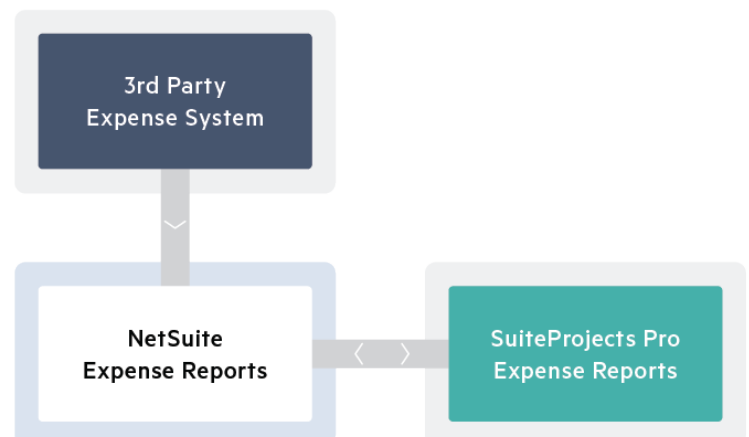
Yes

Can I bill those expenses in SuiteProjects Pro back to my Client?

Yes

Benefits of SuiteProjects Pro Integration Services

- Dedicated team experienced in SuiteProjects Pro and integration best practices
- Leverage the strength of each systems intended purpose
- Improve speed at which information is available
- Increase communication accuracy across your business units



Our Approach

We follow a simple and straightforward approach that delivers a superior solution.

1

Business Model Alignment and Design

- Use of workshops to identify system ownership by department.
- Review of data ownership by system.
- Determine data workflows, frequency, and integration technology/software.

2

Integration Build Out and Validation

- Gather field specifics from each system for mapping and transformation needs.
- Configure and connect integration technology to end systems.
- Establish use case and testing scenarios to confirm performance, design, error handling, and more.

3

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.

Integration Tools We Use

We primarily utilize NetSuite SuiteProjects Pro's native APIs to connect SuiteProjects Pro to other systems. We also have deep experience with Dell Boomi AtomSphere® and NetSuite SuiteProjects ProCONNECT with additional leading integration products continually being evaluated and added to our tool set. Our integration experience combined with our expertise in NetSuite SuiteProjects Pro allows us to help you quickly and smoothly design and implement the data integration exchanges for your specific PS business model.

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 to explore how Top Step can elevate your operational excellence.

