

Connect SuiteProjects Pro to Hubspot

One of the challenges in your project-based organization is getting your sales and services teams on the same page. By integrating the two systems, you create an environment that removes barriers of “your data” and “my data” conflicts that create miscommunication and unreliable reporting. Top Step understands these challenges and how to set you on a path to improving your sales to services process by integrating between your SuiteProjects Pro and Hubspot environments. By automating data flows between systems, you can concentrate on generating revenue and managing profitable projects.

What Data Is Exchanged?

- Seamless movement of Opportunity data from Hubspot into SuiteProjects Pro projects
- Sending client information in Hubspot to Client information in SuiteProjects Pro
- Converting product lines into budget transactions for order line level detail tracking
- Movement of contact information from Hubspot to SuiteProjects Pro for invoicing
- Movement of selected project and client data points back into Hubspot

Common Questions

Can the integration access all Hubspot objects?

Yes

Can metrics and other project metadata information be sent back to Hubspot from SuiteProjects Pro?

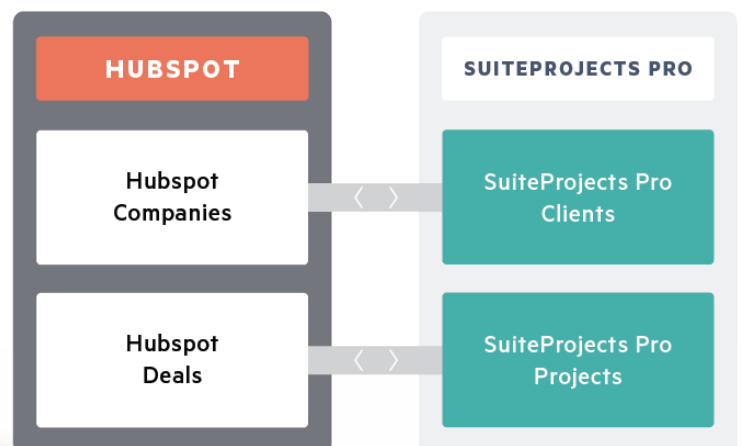
Yes

We also use NetSuite, is there a way to easily integrate the 3 systems?

Yes, you can capture customer and project information from Hubspot, pull it into SuiteProjects Pro, and push it to NetSuite.

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.

