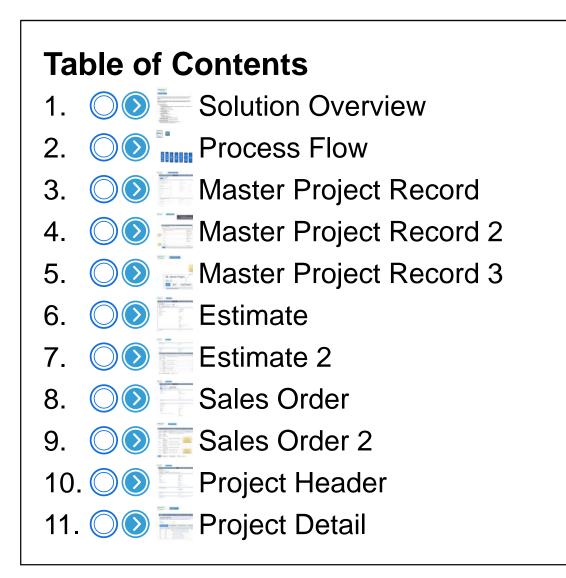


8Quanta Project Billing Automation Built for NetSuite









Solution Overview

The Project Billing Automation SuiteApp from 8Quanta leverages standard NetSuite functionality coupled with specialized utilities that automates the creation of Sales and Project records in NetSuite.

A flexible canvas makes project design easy. Produce an Estimate or a ready-to-execute Project and Sales Order with the click of a button. Leverages standard NetSuite processes for Time/ Expense entry and Billing.

- Master Project Record
 - Flexible Design Canvas
 - Combines Project Tasks (from Project Template) and Billable Items in single workspace for project design and pricing
 - Version control
 - Change orders create new revision
 - History preserved
 - Choose Project Billing Type
 - Time & Materials
 - Fixed Bid Milestone
 - Click Buttons to create/modify:
 - Estimate
 - Sales Order & Project
 - Ready to execute and bill
 - Creates/utilizes Description Items on Sales Records
 - Automates Billing setup
 - Allows Sales Documents to be utilized as Contracts
- NetSuite Project Templates
 - Automatically creates/links Service Items to Project Tasks
 - Facilitates Time Entry to correct Service Item









Master Project Record Header

🕒 ★ 🟠 Activities	Payments	Transactions	Lists	Reports	Analytics	Documents	Setup	Customization	Administration and Controls	Implementatio	n		•••
8Q - Master Project Save Cancel										List Sea	arch Ci	ustomize	More
Primary Information													
CUSTOM FORM * Custom 8Q - Master Project Form	•		PF	ROJECT DATE					PROPOSAL / ESTIMATE				
PROJECT TEMPLATE *	1		PF	ROJECT BILLIN	IG TYPE *				SO APPROVED DATE				
CUSTOMER *	•		RA	ATE CARD		•			SO REVISION DATE				
<type tab="" then=""></type>	*					•			SALES ORDER				
ID * To Be Generated	AUTO		TR	RANSACTION	DATE *				PROJECT				
NAME *			PF	ROJECT MANA	GER	-			STATUS				
LOCATION			M	emo					PREVIOUS VERSION				
DEPARTMENT	•												
CLASS	•					li.							
Proposal/Estimate Required Fields													
PROPOSAL NAME *			PF	ROJECT LOCAT	TION *				STATE * <type tab="" then=""></type>	*			
PROPOSAL STATUS *			ST	REET *					ZIP *				
PROJECT STATUS *	•		CI	TY *					ORIGINATING OFFICE LOCATION *				
	•									•			
INACTIVE													

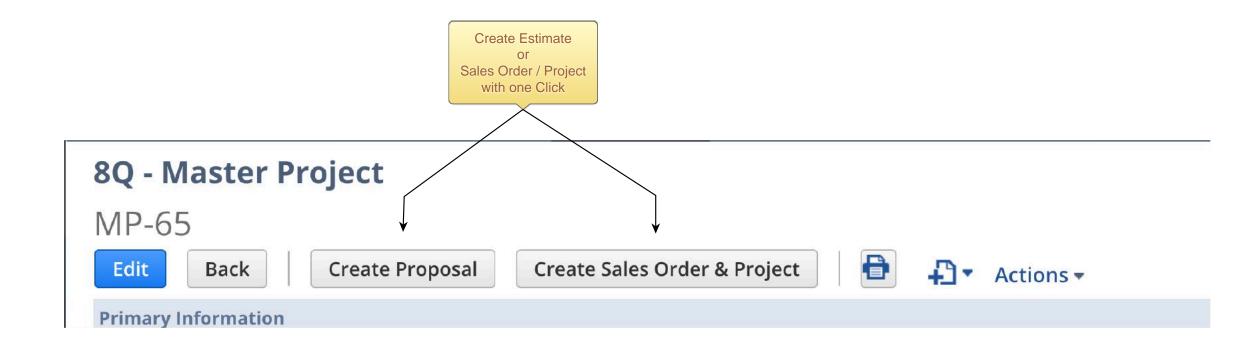


Master Project Record

Flexible Design Canvas Combines Project Tasks (from Project Template) and Billable Items in single workspace for project design and pricing

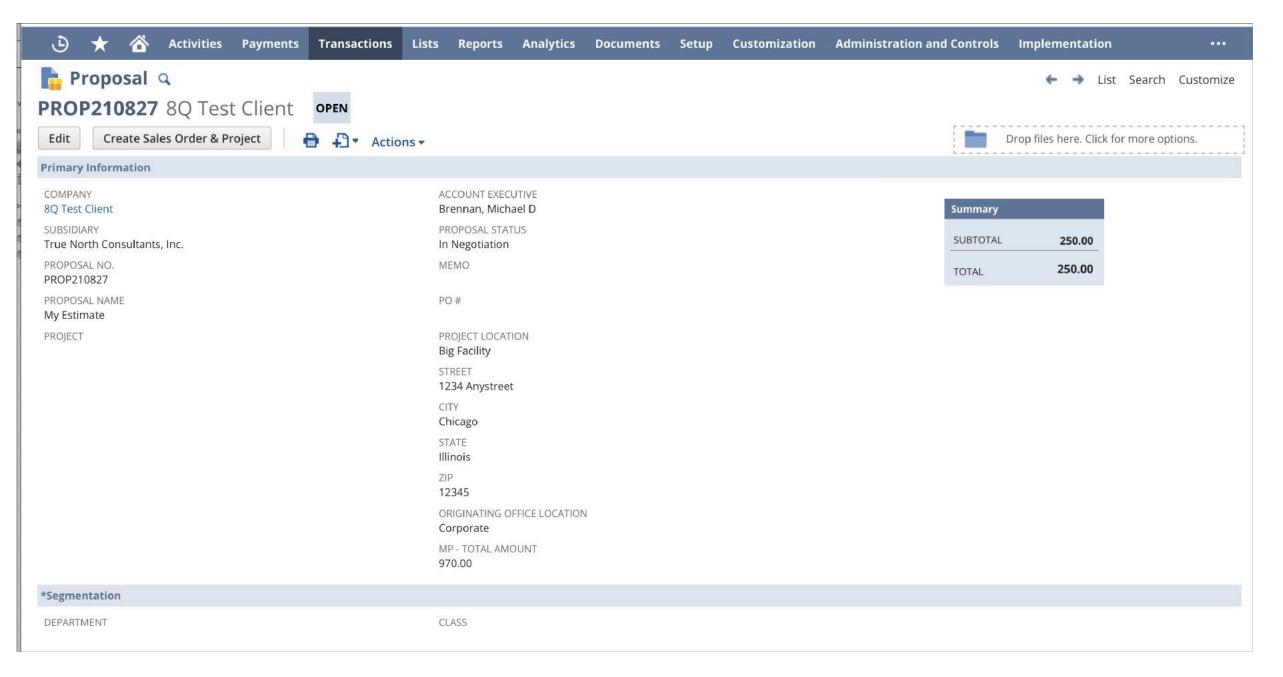
	Project Items Notes Workflow New 8Q - Project Items Items <t< th=""><th><u>S</u>ystem Logs</th><th></th><th></th><th></th><th>Uses NetSuite Price Levels</th><th></th><th>or Rate Card</th><th></th><th></th><th></th></t<>	<u>S</u> ystem Logs				Uses NetSuite Price Levels		or Rate Card			
	ITEM *	LOCATION	DEPARTMENT	CLASS	PROJECT TASK	PRICE LEVEL	QUANTITY	RATE	AMOUNT	PARENT ITEM	DESCRIPTION ITEM
	Focused Asbestos-Containing Materi II Survey	al			Focused Asbestos- Containing Material Survey	Base Price	4	90.00	360.00		Focused Asbestos- Containing Materia Survey
t	PRC COOR				Principal Consultant - Report Review and QC	Base Price	1	55.00	55.00	Focused Asbestos- Containing Material Survey	PRC COOR
	SC RPT				Staff Consultant - Reporting	Base Price	1	105.00	105.00	Focused Asbestos- Containing Material Survey	SC RPT
	AC FLD				Associate Consultant - Field Work	Base Price	1	95.00	95.00	Focused Asbestos- Containing Material Survey	AC FLD
	SC COOR		Staff Consultant - Coordination	Base Price	1	105.00	105.00	Focused Asbestos- Containing Material Survey	SC COOR		
el	II LAB PBA		Base Price	10							
	II ODC MAT					Base Price	5				
	<type tab="" then=""></type>			n.	<type tab="" then=""></type>					<type tab="" then=""></type>	







Estimate Header





INCLUDE	IN FORECAST			OBABILITY					EXPECTED 10/12/20					
			/5	5.0%										
									EXPIRATIO 1/10/202					
									1710/202	-				
ystem Info	rmation													
PROPOSAL DA	ATE		LA	ST MODIFICATIO	N DATE									
0/12/2023			10)/12/2023										
OMMENTS			PF	IONE NUMBER										
Items E	Billing <u>R</u> elation	ships <u>C</u> ommunication	Related Records	<u>S</u> ystem Info	rmation	<u>8</u> Q PBA								
												CREATE		
	DISPLAY							PRICE				PROJECT	PROJECT	
ITEM	NAME/CODE	DESCRIPTION		DEPARTMENT	CLASS	LOCATION	QUANTITY	LEVEL	MP - RATE	MP - AMOUNT	OPTIONS	TASK	TASK ID	MEMO
Focused Asbestos-	Focused Asbestos-	Focused Asbestos-Containing	g Material Survey					Custom	360.00	360.00				
	Containing													
Material	Material Survey													
Survey														
PRC COOR		Project Coordinator - Coordin	nation					Custom	55.00	55.00				
	Coordinator - Coordination													
SC RPT		Staff Consultant - Reporting						Custom	105.00	105.00				
	- Reporting													
AC FLD	Associate	Associate Consultant - Field V	Vork					Custom	95.00	95.00				
	Consultant -													
SC COOR	Field Work	Staff Consultant - Coordinatio						Custom	105.00	105.00				
SC COOR	- Coordination	stan Consultant - Coordinatio						Custom	105.00	105.00				
LAB PBA		Lead Air Sample Analysis					10	Custom	15.00	150.00				
	Analysis													
ODC MAT	Field Materials & Supplies	Field Materials & Supplies					5	Custom	20.00	100.00				

Edit



Sales Order Header

🕒 ★ 쑵 Activities Payme	nts Transactions	Lists Reports	Analytics	Documents	Setup	Customization	Administration and Co	ontrols	Implementati	on	•••
🔓 Sales Order 🔍									← →	List Search	u Customiz
5095 8Q Test Client PENDI	NG FULFILLMENT										
Fulfill Close Order Create Depo	sit 🔒 🗗 🗸	Actions 🕶							Drop files here. Cli	ck for more o	ptions.
Primary Information							L -				
CUSTOMER		ORDER #					N.				
8Q Test Client		SO95					Sui	mmary			
DATE 10/12/2023		SUBSIDIARY True North Co	nsultants, Inc.				SU	JBTOTAL	250.00		
		MEMO					то	DTAL	250.00		
		PO #									
		MP - TOTAL AM 970.00	OUNT								
Segmentation											
DEPARTMENT		CLASS					LOCATION Corporate				
Sales Information											
ACCOUNT EXECUTIVE Brennan, Michael D		BILLING SCHED	ULE								
PROJECT 7231180 6167		START DATE E	ND DATE								
AST MODIFIED DATE 0/12/2023		PROJECT LOCA Big Facility	ΓΙΟΝ				PHONE NUMBER				
CREATED DATE		CITY Chicago									
COMMENTS		STATE Illinois									
EXCLUDE FROM ELECTRONIC BANK PAYMENTS PR	ROCESSING	ZIP 12345									
		STREET 1234 Anystree	t								



Sales Order Detail

Items B	Billing <u>A</u> ccount	ing <u>R</u> elationships <u>C</u> ommunicatio	on R <u>e</u> lated Records		nformation	<u>8</u> Q PBA								
ITEM	DISPLAY NAME/CODE	DESCRIPTION	DEPARTMENT	CLASS	LOCATION	QUANTITY	PRICE LEVEL	MP - RATE	MP - AMOUNT	OPTIONS	CLOSED	CHARGE TYPE	PROJECT CHARGE RULE	
Focused Asbestos- Containing Material Survey	Focused Asbestos- Containing Material Survey	Focused Asbestos-Containing Material So	Project Tasks				Custom	360.00	360.00					
PRC COOR	Project Coordinator - Coordination	Project Coordinator - Coordination	Converted to Description Items for use as				Custom	55.00	55.00					
SC RPT	Staff Consultant - Reporting	Staff Consultant - Reporting	Contract Document				Custom	105.00	105.00					
AC FLD	Associate Consultant - Field Work	Associate Consultant - Field Work					Custom	95.00	95.00					
SC COOR	Staff Consultant - Coordination	Staff Consultant - Coordination					Custom	105.00	105.00					
LAB PBA	Lead Air Sample Analysis	Lead Air Sample Analysis	Billable Items Carried Over from Master Project			10	Custom	15.00	150.00					
ODC MAT	Field Materials & Supplies	Field Materials & Supplies	Record			5	Custom	20.00	100.00					



Project Header

٩ Activities Payments Transactions Lists Reports Analytics Documents Setup Customization Administration and Controls Implementation Project 🔍 🗅 → List View Dashboard Search 4 T231180 8Q Test Client 0 Create Template Actions -Set Baseline Search Drop files here. Click for more options. -----**Primary Information** PROJECT NAME PROJECT MANAGER 6167 Fries, Robert PROJECT ID PROJECT STATUS T231180 In Progress PROJECT LOCATION NAME 6167 **Big Facility** COMPANY NAME STREET **8Q Test Client** 1234 Anystreet SUBSIDIARY CITY True North Consultants, Inc. Chicago STATE ZIP Illinois 12345 ORIGINATING OFFICE LOCATION Corporate Additional Information INVOICE PRESENTATION TEMPLATE **BILLING TYPE** COMMENTS **Time and Materials** BILLING SCHEDULE **Project Overview** ACTUAL WORK ESTIMATED WORK PERCENT WORK COMPLETE 4:00 0:00 0.0% **Project Schedule** PROJECTED START DATE PROJECTED COMPLETION DATE REPORT DUE DATE 10/12/2023 REPORT DELIVERY DATE



Schedule	<u>R</u> esources	<u> Einancial</u> <u>P</u> ro	oject Indicators	P <u>&</u> L	<u>B</u> udget	R <u>e</u> lationships	<u>C</u> ommunicati	on S <u>a</u> les	Prefere <u>n</u> ces	System Information	Work Breakdown Structu	ure <u>8</u> Q PBA	Pr <u>o</u> curem
Project	Tasks / Milesto	nes •											
The following	g tasks either have no	assignee or have assign	nment lines missing pr	ricing informa	ition: 2, 3, 4	, 5							
VIEW													
Tracking		-											
_													
New P	roject Task	New Milestone	View Gant	tt Chart	Cust	omize View							
EDIT	ID MILESTON	IE NAME	• EXPAND AL	L 🕘 COLLA	PSE ALL	PREDECESSORS	START DATE	START DATE BAS	ELINE END DA	TE END DATE BASELIN	E ESTIMATED WORK	ACTUAL WORK	COPY TASK
Edit	1 No	Focused Asl	bestos-Containing	, Material S	urvey		10/12/2023		10/12/2	023	4	0	Сору
Edit	2 No	Principal C	onsultant - Report	t Review an	d QC		10/12/2023		10/12/2	023	1	0	Сору
Edit	3 No	Staff Consu	ultant - Reporting				10/12/2023		10/12/2	023	1	0	Сору
Edit	4 No	Associate C	Consultant - Field \	Work			10/12/2023		10/12/2	023	1	0	Сору
Edit	5 No	Shaff Canad	ultant - Coordinati				10/12/2023		10/12/2	022	1	0	Сору