














8Quanta
Project Billing Automation
Built for NetSuite





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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



Process Flow



8Q - Master Project

List Search Customize More

Save

Primary Information

CUSTOM FORM *

PROJECT TEMPLATE *

CUSTOMER *

ID *
 AUTO

NAME *

LOCATION

DEPARTMENT

CLASS

PROJECT DATE

PROJECT BILLING TYPE *

RATE CARD

TRANSACTION DATE *

PROJECT MANAGER

MEMO

PROPOSAL / ESTIMATE

SO APPROVED DATE

SO REVISION DATE

SALES ORDER

PROJECT

STATUS

PREVIOUS VERSION

Proposal/Estimate Required Fields

PROPOSAL NAME *

PROPOSAL STATUS *

PROJECT STATUS *

PROJECT LOCATION *

STREET *

CITY *

STATE *

ZIP *

ORIGINATING OFFICE LOCATION *

INACTIVE

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

Project Items Notes Workflow System Logs										
New 8Q - Project Items										
ITEM *	LOCATION	DEPARTMENT	CLASS	PROJECT TASK	PRICE LEVEL	QUANTITY *	RATE	AMOUNT	PARENT ITEM	DESCRIPTION ITEM
⋮ Focused Asbestos-Containing Material Survey				Focused Asbestos-Containing Material Survey	Base Price	4	90.00	360.00		Focused Asbestos-Containing Material Survey
⋮ 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
⋮ LAB PBA					Base Price	10				
⋮ ODC MAT					Base Price	5				

✓ Add ✗ Cancel + Insert 🗑 Remove ⬆ Move Up ⬇ Move Down 📄 Move To Top 📄 Move To Bottom

Uses NetSuite Price Levels

Rate from Service Item or Rate Card

Project Tasks

Billable Items

Create Estimate
or
Sales Order / Project
with one Click

8Q - Master Project

MP-65

Edit

Back

Create Proposal

Create Sales Order & Project



Actions

Primary Information



Proposal

← → List Search Customize

PROP210827 8Q Test Client

OPEN

Edit

Create Sales Order & Project

Actions

Drop files here. Click for more options.

Primary Information

COMPANY 8Q Test Client	ACCOUNT EXECUTIVE Brennan, Michael D
SUBSIDIARY True North Consultants, Inc.	PROPOSAL STATUS In Negotiation
PROPOSAL NO. PROP210827	MEMO
PROPOSAL NAME My Estimate	PO #
PROJECT	PROJECT LOCATION Big Facility
	STREET 1234 Anystreet
	CITY Chicago
	STATE Illinois
	ZIP 12345
	ORIGINATING OFFICE LOCATION Corporate
	MP - TOTAL AMOUNT 970.00

Summary	
SUBTOTAL	250.00
TOTAL	250.00

*Segmentation

DEPARTMENT	CLASS
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Sales Information

INCLUDE IN FORECAST

PROBABILITY
75.0%

EXPECTED CLOSE
10/12/2023

EXPIRATION DATE
1/10/2024

System Information

PROPOSAL DATE
10/12/2023

LAST MODIFICATION DATE
10/12/2023

COMMENTS

PHONE NUMBER

Items Billing Relationships Communication Related Records System Information 8Q PBA

ITEM	DISPLAY NAME/CODE	DESCRIPTION	DEPARTMENT	CLASS	LOCATION	QUANTITY	PRICE LEVEL	MP - RATE	MP - AMOUNT	OPTIONS	CREATE PROJECT TASK	PROJECT TASK ID	MEMO
Focused Asbestos-Containing Material Survey	Focused Asbestos-Containing Material Survey	Focused Asbestos-Containing Material Survey					Custom	360.00	360.00				
PRC COOR	Project Coordinator - Coordination	Project Coordinator - Coordination					Custom	55.00	55.00				
SC RPT	Staff Consultant - Reporting	Staff Consultant - Reporting					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				10	Custom	15.00	150.00				
ODC MAT	Field Materials & Supplies	Field Materials & Supplies				5	Custom	20.00	100.00				



Sales Order

List Search Customize

SO95 8Q Test Client PENDING FULFILLMENT

Fulfill Close Order Create Deposit Actions

Drop files here. Click for more options.

Primary Information

CUSTOMER 8Q Test Client
DATE 10/12/2023
ORDER # SO95
SUBSIDIARY True North Consultants, Inc.
MEMO
PO #
MP - TOTAL AMOUNT 970.00

Summary table with columns: Item, Amount. Rows: SUBTOTAL 250.00, TOTAL 250.00

Segmentation

DEPARTMENT CLASS LOCATION Corporate

Sales Information

ACCOUNT EXECUTIVE Brennan, Michael D
PROJECT T231180 6167
LAST MODIFIED DATE 10/12/2023
CREATED DATE 10/12/2023
COMMENTS
BILLING SCHEDULE
START DATE END DATE
PROJECT LOCATION Big Facility
CITY Chicago
STATE Illinois
PHONE NUMBER
ZIP 12345
STREET 1234 Anystreet

EXCLUDE FROM ELECTRONIC BANK PAYMENTS PROCESSING

ITEM	DISPLAY NAME/CODE	DESCRIPTION	DEPARTMENT	CLASS	LOCATION	QUANTITY	PRICE LEVEL	MP - RATE	MP - AMOUNT	OPTIONS	CLOSED	CHARGE TYPE	PROJECT CHARGE RULE	P
Focused Asbestos-Containing Material Survey	Focused Asbestos-Containing Material Survey	Focused Asbestos-Containing Material Survey					Custom	360.00	360.00					
PRC COOR	Project Coordinator - Coordination	Project Coordinator - Coordination					Custom	55.00	55.00					
SC RPT	Staff Consultant - Reporting	Staff Consultant - Reporting					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				10	Custom	15.00	150.00					
ODC MAT	Field Materials & Supplies	Field Materials & Supplies				5	Custom	20.00	100.00					

Project Tasks Converted to Description Items for use as Contract Document

Billable Items Carried Over from Master Project Record



Project

List View Dashboard Search

T231180 8Q Test Client

[Set Baseline](#)
[Create Template](#)
[Search](#)
[Actions](#)

Drop files here. Click for more options.

Primary Information

PROJECT NAME 6167	PROJECT MANAGER Fries, Robert
PROJECT ID T231180	PROJECT STATUS In Progress
NAME 6167	PROJECT LOCATION Big Facility
COMPANY NAME 8Q Test Client	STREET 1234 Anystreet
SUBSIDIARY True North Consultants, Inc.	CITY Chicago
	STATE ZIP Illinois 12345
	ORIGINATING OFFICE LOCATION Corporate

Additional Information

INVOICE PRESENTATION TEMPLATE	BILLING TYPE Time and Materials	COMMENTS
	BILLING SCHEDULE	

Project Overview

ESTIMATED WORK 4:00	ACTUAL WORK 0:00	PERCENT WORK COMPLETE 0.0%
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Project Schedule

PROJECTED START DATE 10/12/2023	PROJECTED COMPLETION DATE	REPORT DUE DATE
		REPORT DELIVERY DATE



Project Tasks / Milestones •

The following tasks either have no assignee or have assignment lines missing pricing information: 2, 3, 4, 5

VIEW

Tracking

New Project Task

New Milestone

View Gantt Chart

Customize View

EDIT	ID	MILESTONE	NAME	EXPAND ALL COLLAPSE ALL	PREDECESSORS	START DATE	START DATE BASELINE	END DATE	END DATE BASELINE	ESTIMATED WORK	ACTUAL WORK	COPY TASK
Edit	1	No	<input checked="" type="checkbox"/> Focused Asbestos-Containing Material Survey			10/12/2023		10/12/2023		4	0	Copy
Edit	2	No	Principal Consultant - Report Review and QC			10/12/2023		10/12/2023		1	0	Copy
Edit	3	No	Staff Consultant - Reporting			10/12/2023		10/12/2023		1	0	Copy
Edit	4	No	Associate Consultant - Field Work			10/12/2023		10/12/2023		1	0	Copy
Edit	5	No	Staff Consultant - Coordination			10/12/2023		10/12/2023		1	0	Copy