Integrated Planning, Budgeting and Forecasting

NetSuite Planning and Budgeting

NetSuite Planning and Budgeting is used by companies worldwide to meet organization-wide business planning needs. It is designed to address a wide variety of financial, sales, contractual and operational planning use cases across multiple industries, and is accessible via rich interfaces through web or Microsoft Office.

Find Out How The Right Business Tools Can Help You Succeed

Key Benefits

- No hardware or IT investments.
- Fully customizable and owned by Lines of Business.
- Migrate from disconnected planning tools and spreadsheets.
- Work with latest version of the software.
- Multiple environments and global data centers for deployment.
- Low cost and time to implement.

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Integrated Organization-Wide Planning and Budgeting Process

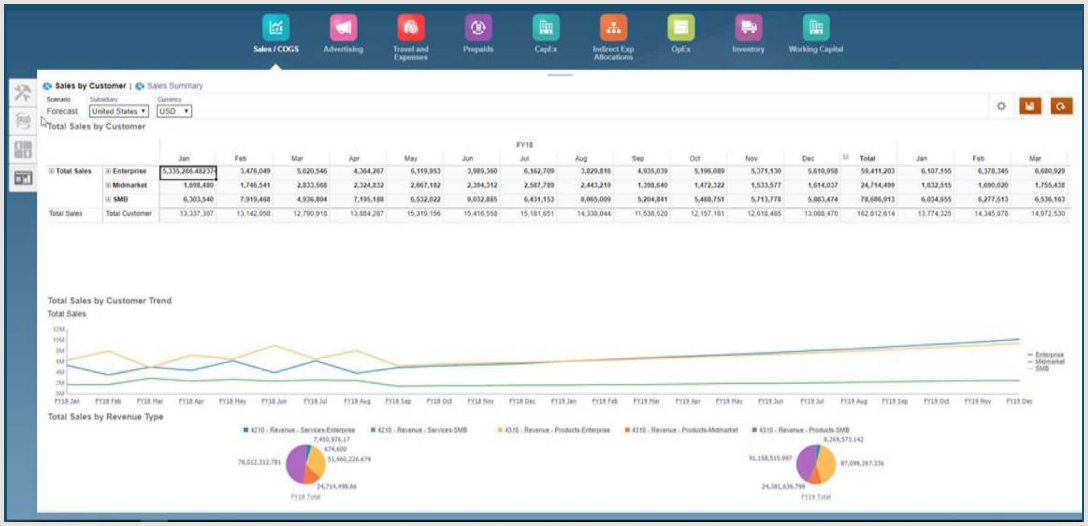
Planning and budgeting using spreadsheets in most organizations results in less collaboration, more inefficiency and is error-prone.

NetSuite Planning and Budgeting facilitates both company-wide and departmental planning with modeling capabilities, approval workflows and reporting within one collaborative scalable solution. Sales and operationally driven strategic plans can be linked to long-term and near-term financial plans. The solution uses a powerful calculation engine which can accommodate a wide range of business logic with fast in-memory aggregation and instant analysis and reporting.

Key Features

- Intuitive, role-based web and MS Office interfaces.
- Flexible driver based what-if modelling capabilities.
- Built-in financial intelligence and spreading logic.
- Built-in commentary and annotation capabilities.
- Flexible workflow and plan management capabilities.
- Robust reporting and ad-hoc analysis with formatting and charting support.
- Integration with NetSuite Financials.

Dashboards provide business users easy access to information.



Robust Modelling with Sandboxing and Predictive Analytics

Demand is volatile, costs fluctuate and the business landscape is constantly changing. NetSuite Planning and Budgeting enables the ability to stay ahead of the competition by understanding volatility and modeling financial and operational changes quickly using flexible assumptions. Use sophisticated modelling techniques, predictive analytics, multiple what-if scenarios and rolling forecasts to minimize uncertainty in the business.

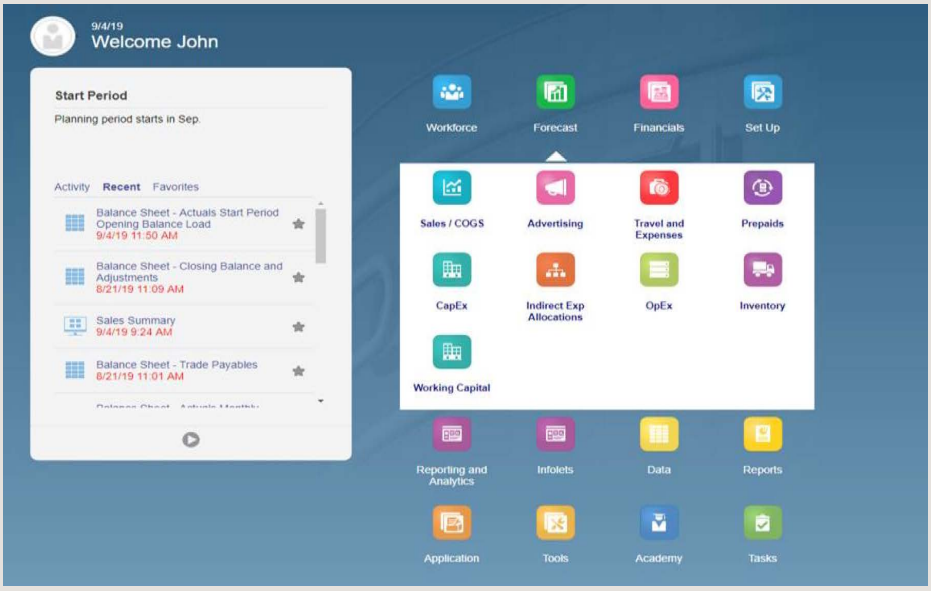
Connect Users with an Intuitive, Mobile-Ready User Interface

The NetSuite Planning and Budgeting interface allows users easy access to view plans and reports on the web or their mobile devices. Robust dashboard and report creation capabilities are built-in for streamlined access to information.

Smart View Benefits

- Quickly navigate plan versions and details in Excel.
- Full ad-hoc and free form analysis capabilities.
- Report creation in Excel, Word and PowerPoint.
- Data access from multi-dimensional sources.
- Create unique data perspectives for users.
- Dynamically refresh Office documents with a single click.
- Support for highly formatted grids in Microsoft Excel.

The mobile-ready and intuitive interface of NetSuite Planning and Budgeting combines task lists, instructions, dashboards and graphical reports.



Empower Users with Microsoft Office Integration

NetSuite Planning and Budgeting offers comprehensive integration with Microsoft Office tools such as Microsoft Outlook, Excel, Word and PowerPoint with Smart View for Office.

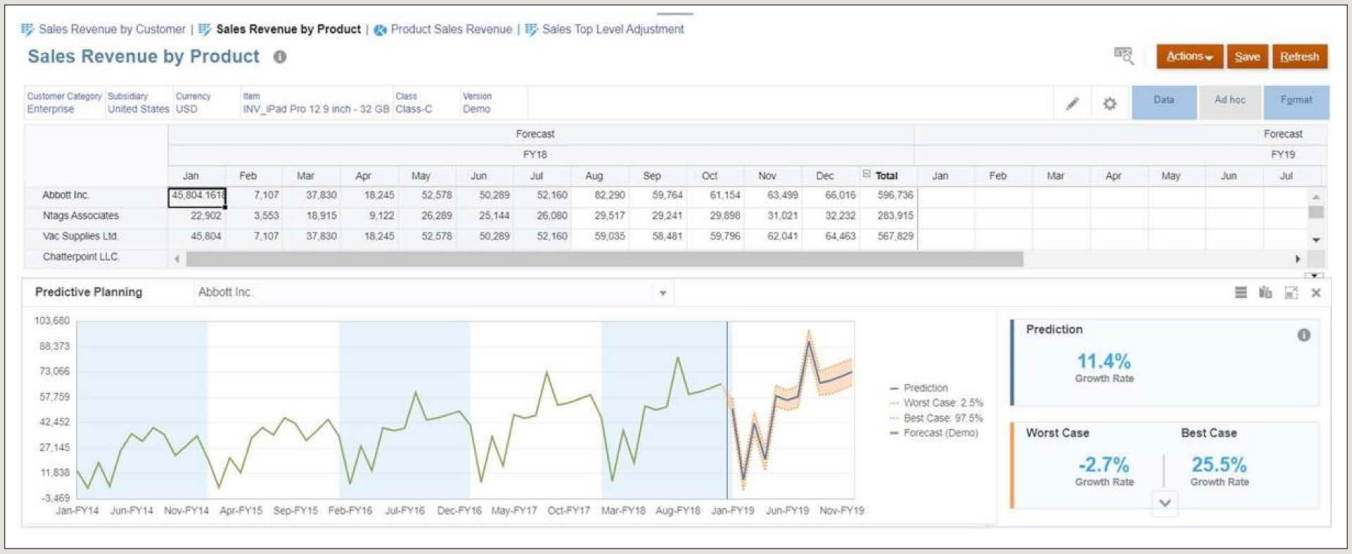
Use Excel as the environment for adding custom members on the fly, slicing and dicing data and ad-hoc modelling. Users can also create data grids incorporating Excel formulas and formats. Common planning actions, such as spreading and allocation, are available within planning data grids rendered within Microsoft Excel.

Integrate Planning and Management Reporting Seamlessly

Reports and dashboards that display plan, forecast and actual data can be created in minutes and any change made to versions are instantaneously reflected.

SuiteSuccess for Planning and Budgeting

SuiteSuccess for Planning and Budgeting is available in two unique editions, intended for businesses in different stages of organization growth. Each edition provides a certain level of functionality, pricing and deployment speed so that you can clearly identify which edition is the best solution for your planning and budgeting requirements.



Predictive Planning uses sophisticated time-series forecasting techniques to create new predictions or validate existing forecasts.

SuiteSuccess – Planning and Budgeting Premium Edition

Planning and Budgeting Premium Edition is intended to provide a holistic planning and budgeting solution that is primarily developed for your specific industry. While already being a comprehensive offering tailored toward your industry, this edition also allows for moderate customization to your business and acts as a springboard to accelerate future growth.

Delivery Motion and Speed: Scoping Required

- Planning and Budgeting Premium Edition is implemented by expert NetSuite Services consultants. Your dedicated implementation team will align all solution customizations and timelines and will devote themselves to warrant an on-schedule implementation.

Features included:

- Industry Specific Models
  - Verticalized Metrics (SaaS, Other)
  - Project Planning
  - Cash Projections
- Verticalized OpEx and Expense Planning
- Verticalized Revenue Planning
- Driver and Trended Forecasting
- Financial Reporting and Variance Analysis
- Indirect Cash Flow
- Workforce Planning
- Smart View Office Intergration

Industries designed for:

- Software
- Agencies
- Services
- Nonprofit
- Wholesale Distribtuion
- Manufacturing
- Retail

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