



CASE STUDY



**NETSUITE FOR
SOFTWARE & TECHNOLOGY,**

**PROP-TECH SOLUTION &
STUDENT,**

**COUNSELLING & FINANCIAL
SERVICES**

COMPANY LOCATION

Mumbai, India
London, UK
Shanghai, China

INDUSTRY

Software & Technology,
Prop-Tech Solution &
Student,
Counselling & Financial
Services

APPLICATION REPLACED

Tally,
MS Excel

NETSUITE SOLUTION

NetSuite ERP,
NetSuite OneWorld,
NetSuite Advanced
Financials

> ABOUT COMPANY

The company is an investment and wealth management firm that aims to lead contemporary investors toward identifying and capitalizing on the most rewarding property investment options across the globe. The team of financial experts oversees strategic partnerships with reputed offshore partners, offering their clients a seamless turnkey investment process with total management and visibility.

> THE CHALLENGES

- ⇒ Disparate systems, Multiple sources of truth. (Data in Inhouse CRM and then Tally)
- ⇒ It takes months in closing Month End Activities.
- ⇒ Manual Consolidation & Intercompany Management.
- ⇒ No real-time reports and visibility of Data for making informed decisions.
- ⇒ Manual Budgeting & Comparison with Actuals.
- ⇒ Manual Employee Expense Management and Approvals over emails and excels.
- ⇒ Manual Localization & Compliance.

> THE SOLUTIONS

- ✓ NetSuite ERP was Implemented by AGSuite Technologies as a single Integrated ERP to replace multiple systems. Also by integrating in-house CRM with NetSuite, there was no manual data entry in multiple systems, and data flow was seamless. NetSuite is a single source of truth.
- ✓ NetSuite Advanced Financials was Implemented to avoid a lot of manual work involved in month-end close.
- ✓ NetSuite Oneworld was implemented to manage India subsidiaries in a single system, Automatic real-time Consolidation & Intercompany Management.
- ✓ SuiteSuccess Bundles bring Role-based Dashboards for all users built using Industry leading practices. Also, the Built-In BI & Analytics tool further helped with additional reporting requirements.
- ✓ NetSuite budgeting module allowed to upload the budget and review real-time Budget vs Actual reports and Variance.
- ✓ Employee Expense & Reimbursement module helped automate the complete process including approvals.
- ✓ AGSuite's Advanced India Localization Add-on solution helped to streamline E-invoicing, GST, TDS, TCS, and GSTR 2B reconciliation within NetSuite.