

Systems Transformations

LOOKBOOK



This is what we do.

We get you to a
Single Source of Truth

Where We've Orchestrated Transformations





Education

Operational Systems Transformation



Hospitality

Multi-Entity Unification



Real Estate

Logistics Alignment



Food Manufacturing

End-to-End Operational Integration



Construction

Digital Systems Integration



Beauty & Wellness

Multi-Branch Consolidation



Food & Beverages

Operational Systems Transformation



Shipping & Logistics

Fleet management and freight revenue tracking



B2B Distribution

NetSuite Optimization
(Scout AI Assessment)



Vehicle Dealership

Sales & inventory lifecycle management



Finance

Distribution & intercompany billing
optimization



Non-Profit

Workforce training operations



Retail

Inventory management & POS integration

A Sampling of Our Transformation Portfolio



SHIPPING & LOGISTICS INDUSTRY

The Challenge

- No voyage-level profitability: revenue and cost could not be tied to individual vessels in time to act
- Fragmented financials across five subsidiaries, forcing manual consolidation
- Disconnected passenger and freight ticketing with reconciliation gaps and overbooking risk
- Manual, error-prone rate management producing pricing disputes
- Complex VAT, withholding tax, and BIR reporting handled by hand

What We Designed

NetSuite OneWorld as a single operating platform, with ~27 vessels tagged as profit and cost centers, three shipping companies configured as divisions under a consolidated chart of accounts, integrated passenger and freight ticketing feeding daily sales into NetSuite, automated rate controls, approval-routed procurement, and built-in tax compliance.

What It Took

A multi-entity NetSuite OneWorld implementation with Advanced Financials and Fixed Assets, industry integrations for passenger and freight ticketing, and a custom vessel segment for per-voyage reporting across the group.

The Results

- Voyage- and vessel-level profitability visibility, replacing after-the-fact estimates
- Consolidated group financials with statutory separation preserved
- Passenger and freight ticketing integrated, closing reconciliation gaps
- Automated pricing that eliminates rounding errors and disputes
- Withholding-tax and BIR-aligned compliance within one platform

A holding company with a fleet of more than 20 vessels carrying passengers, vehicles, and freight engaged Softype to unify its shipping, freight, trading, and property businesses on a single platform.



Need to know more?

Nana Luz

nanal@softype.com

EDUCATION INDUSTRY

The Challenge

- Tuition bills, scholarships, and payments re-keyed manually from SIS to accounting
- No system-enforced approval matrix for purchase orders or vendor bills
- Master data fragmented across both entities, producing brittle cross-entity reporting
- Fixed assets and bookstore inventory tracked outside an integrated system
- No role-based dashboards or consolidated departmental reporting

The Results

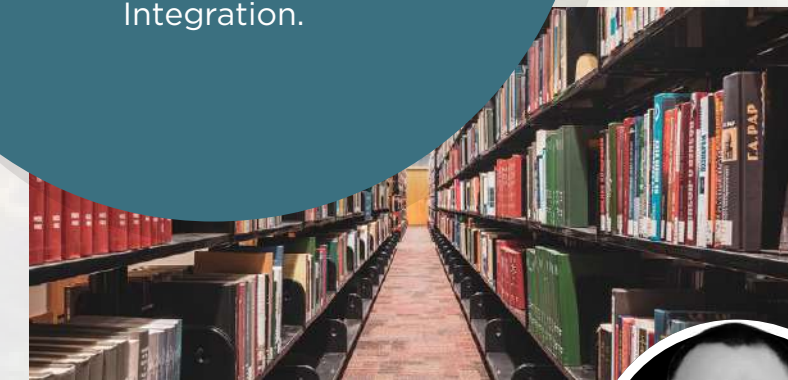
- Two subsidiaries live on NetSuite, with SIS-to-finance pipeline running daily
- Approval matrix enforcing PO and Vendor Bill controls
- Centralized master data and standardized reporting across both entities
- Project closed on plan with hyper-care complete

What We Designed

NetSuite ERP across both subsidiaries, plus an EdRP integration: a daily scripted CSV-to-Journal Entry pipeline from the SIS into NetSuite File Cabinet, with per-subsidary folders and an Error Catcher custom record. ~37 custom fields, Approval Matrix bundle, FAM, Withholding Tax, and role-based dashboards.

What It Took

Four phases: Discovery & BPM → BRD Sign-off → Configuration & Build → UAT & Go-Live, with six BPM workstreams covering Organization, Procurement, Sales, Fixed Assets, Accounting, and SIS Integration.



A higher-education group operating a parent university and an affiliated college of medicine as separate legal entities needed to retire manual back-office processes and connect its student information system to a unified financial platform.



Need to know more?
Mark Bugay
markb@softype.com

NON-PROFIT / SOCIAL IMPACT

The Challenge

- Donor and membership tracking lived in disconnected files
- No system-enforced approval matrix for purchase orders or vendor bills
- Financial consolidation done largely outside a unified system
- Limited donor reporting, BI, and segmented email campaign tooling
- Withholding tax and payee reporting needed a standardized approach

What We Designed

- We deployed NetSuite Social Impact (Financials First) covering donor and membership CRM, procure-to-pay with a Transaction Approval Matrix, financial management, donor reporting and BI, and the Withholding Tax bundle.
- We built a Membership Status Change workflow, saved searches for Active and Inactive Members and renewal reminders, and segmented Email Campaigns across Subscribers, Members, and Donors.

Need to know more?

Labika Khan

labikak@softype.com

What It Took

- The engagement ran across four phases: Discovery and BPM, Solution Design and BRD sign-off, Configuration, Build and Data Migration, and UAT, Go-Live and Post Go-Live Support.
- Six BPM sessions covered Organizational Structure, Donor Management, Procure to Pay, Record to Report, CRM, and related topics.

The Results

- Successful go-live, on plan
- Donor and membership lifecycle fully managed inside NetSuite
- PO and Vendor Bill approval matrices operational
- Email Campaign capability stood up across Subscribers, Members, and Donors
- Project formally closed with customer satisfaction confirmed



A regional non-profit funded by member dues and donor contributions set out to retire its fragmented, spreadsheet-based back office for a modern cloud ERP unifying donor and membership management, financials, and procurement on one platform.



Need to know more?

Ebe Mutungwa

ebem@softype.com

PUBLIC SECTOR / DONOR-FUNDED PROGRAMS

The Challenge

- Finance and procurement operating in separate tools with no integrated audit trail
- Legacy system unable to produce donor-format reports
- No activity-based budgeting, with spending limits not enforceable in-system
- Manual donor allocation calculations (across multiple funding sources)
- No unified asset register linked to originating PO and donor activity
- Fragmented petty cash and imprest controls

What We Designed

NetSuite OneWorld with a custom segment hierarchy mirroring the donor's Component → Subcomponent → Activity → Main Sub-activity → Sub-activity model. Advanced Budgeting at the activity level, automated category-based donor splits using Statistical Accounting, integrated Procure-to-Pay with three-level approval, Fixed Asset Management linked to originating PO, and a donor reporting framework aligned to donor quarterly and fund reporting formats.

What It Took

A 12-month engagement across five contract deliverables: Inception, Business Needs Assessment, Configuration, Deployment, and Training & Manuals, purpose-configured for cash-basis donor accounting.

The Results

- Single source of truth for donor-funded program accounting
- Procure-to-pay disconnect closed, addressing donor oversight review findings
- Activity-based budgets enforced at transaction entry
- Automated multi-donor allocation across funding sources
- Unified asset register linked to PO and donor activity

A government ministry running two donor-funded agricultural transformation programs needed to replace an in-house standalone financial system that had been repeatedly flagged in donor oversight reviews as inadequate for donor accounting, procurement controls, and customizable reporting.



Need to know more?

Ebe Mutungwa

ebem@softype.com

RETAIL INDUSTRY (APPLIANCES)

The Challenge

- No unified ERP across the retail network, stores disconnected from finance
- Multi-entity reporting was a manual exercise every period
- Limited store coverage left most branches dark to head office
- Inter-branch inventory transfers were not tracked in real time
- Branch-level financial statements were not possible

What We Designed

NetSuite Financials with Advanced Inventory across all three entities on a single tenant, with class segments for per-entity reporting and Advanced Partner Center (APC) extended to every store for real-time sales, item receipts, and inter-location transfer visibility.

What It Took

A NetSuite Financials implementation with Advanced Inventory deployed via Softype QuickStart, multi-entity class segmentation, and an APC rollout extending real-time operations to every store.

The Results

- Unified ERP across 18+ stores and three entities on a single tenant
- Real-time store-to-head-office visibility
- Class-segmented per-entity financials with consolidated roll-up
- APC-enabled stores without separate full NetSuite licenses
- A foundation for follow-on enhancements

An appliance retailer operating 18+ stores alongside two sister companies engaged Softype to unify its multi-store, multi-entity retail network on a single NetSuite platform.



Need to know more?
Mark Bugay
markb@softype.com

HOSPITALITY INDUSTRY

The Challenge

Running on fragmented systems-: Xero for accounting, multiple POS solutions. No integrated ERP to manage growth across subsidiaries
Expansion plans stalled without unified financial visibility.

The Results

- Multiple business units unified under one platform
- System flexible enough to grow with the business
- Intercompany transactions enabled
- All subsidiaries structured for consolidated GL management

What We Designed

A phased NetSuite implementation: core financials and inventory first, then commissary and food production automation, followed by POS integration--all within a multi-subsidiary structure ready to scale.

What It Took

Discovery workshops to understand subsidiary operations. Phased rollout starting with financials.
Intercompany configuration and user training across locations.



A premier hospitality group operating acclaimed restaurants and a boutique resort needed to unify operations as they expanded into a new 125-suite luxury resort development.



Need to know more?

Dhona Dumalogdog

dhonad@softype.com

HEAVY EQUIPMENT INDUSTRY

The Challenge

QuickBooks decommissioned due to limitations. Excel for accounting, Google Sheets for field scheduling. Manual landed cost calculations and email-based approvals. No integrated view across inventory, sales, and services

The Results

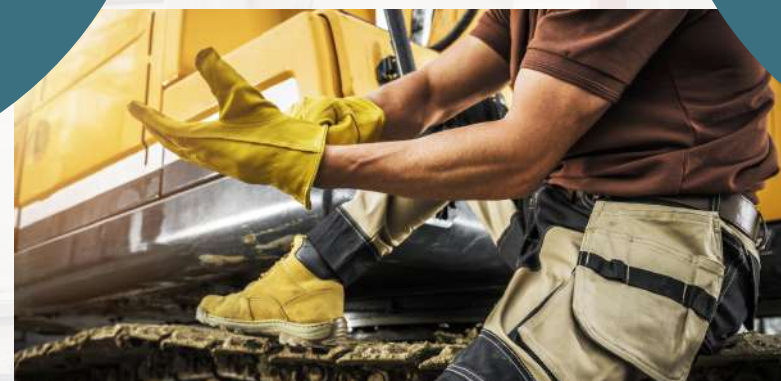
- Real-time visibility across operations
- Automated pricing and landed cost calculations
- Centralized control with BIR compliance
- Scalable system with local support

What We Designed

A phased Odoo deployment covering accounting, inventory, procurement, sales, and approvals--then field service management with mobile apps, automated pricing, and landed cost calculations.

What It Took

Process mapping across sales, service, and inventory. Phased go-live with accounting first. Mobile app deployment for field teams. User training and hypercare support.



A leading heavy equipment dealer managing sales, rentals, spare parts, and field repair services needed to replace disconnected legacy systems holding back growth.



Need to know more?

Nana Luz

nanal@softype.com

BEAUTY & WELLNESS INDUSTRY

The Challenge

SAP B1, Zenoti, and Store Hub - none integrated. Paper sales dockets. 62 users across 48 branches with no unified view.

The Results

Real-time visibility across all brands. Automated costing. Centralized control. Scalable platform.

What We Designed

Odoo deployment: POS, BOM, inventory, accounting, and compliance across all brands--followed by HRIS and payroll integration.

What It Took

Branch-by-branch process mapping. POS configuration across 48 locations. Staff training on digital workflows. Phased rollout with pilot branches first.



A premier beauty provider operating three brands across 48 branches needed to replace paper-based processes and fragmented systems.



Need to know more?

Dhona Dumalogdog

dhonad@softype.com

REAL ESTATE INDUSTRY

The Challenge

PFRS 15 compliance required. Percentage-of-completion accounting. Disconnected systems. Multi-entity consolidation across 10+ subsidiaries.

The Results

PFRS 15 compliance achieved. Automated revenue recognition. Multi-entity visibility. Bank and Salesforce integrations live.

What We Designed

NetSuite with SuiteProjects, automated revenue recognition, Salesforce integration, and bank integration for automated payments.

What It Took

Complex requirements gathering across subsidiaries. Revenue recognition rule configuration. Salesforce and bank integration development. Multi-entity testing and go-live.



A major property developer with multiple subsidiaries needed unified financial operations with complex revenue recognition.



Need to know more?

Nana Luz

nanal@softype.com

MANUFACTURING INDUSTRY

The Challenge

Initial implementation covered financials only. Manufacturing required work orders, assemblies, WIP routing. 3,000-4,000 SKUs needed lot-traceability.

The Results

4-month implementation. Multi-level BOM configuration. Barcode-enabled transactions. Quality inspection tracking.

What We Designed

Advanced Inventory and Work Orders modules: multi-level BOMs, WIP & Routing, barcode integration, quality management.

What It Took

Manufacturing process analysis. BOM structure design. Barcode and quality inspection configuration. 4-month implementation with hypercare support.



A wire harness and LED components manufacturer needed to extend financials implementation to support manufacturing processes.



Need to know more?
Mark Bugay
markb@softype.com

FOOD MANUFACTURING INDUSTRY

The Challenge

- Inaccurate demand forecasting causing stock-outs and excess inventory
- Manual production planning with no raw material visibility
- Limited lot traceability and inconsistent production costing
- Disconnected operational and financial reporting

What We Designed

A comprehensive NetSuite deployment: demand forecasting, manufacturing automation with multi-level BOMs, barcode-driven warehouse management, full lot traceability with recall-ready reporting, and integrated real-time financials.

What It Took

Discovery workshops, phased rollout from demand planning through WMS and financials, user training across all roles.

The Results

- Improved forecast reliability and inventory optimization
- Full traceability and audit-ready compliance
- Real-time production cost transparency and margin visibility

A fast-growing premium food manufacturer needed to replace spreadsheets and disconnected systems as SKU complexity and food compliance requirements outpaced legacy tools.



Need to know more?

Dhona Dumalogdog

dhonad@softype.com

B2B DISTRIBUTION INDUSTRY

The Challenge

- Performance bottlenecks during peak order processing
- Underutilized native capabilities creating avoidable manual work
- Inconsistent master data impacting reporting trust
- Brittle integrations requiring manual rework

What We Designed

A Scout AI-powered read-only assessment covering configuration, scripts, workflows, and integrations — delivering a prioritized roadmap of 7 quick wins and 3 strategic initiatives in two weeks.

What It Took

Read-only access to the existing NetSuite instance. No disruption, no heavy lift, no reimplementation.

The Results

- 37% reduction in monthly close time
- 48% faster order-to-cash cycle
- Improved data trust through standardized controls



A mid-market multi-entity distributor running NetSuite implemented by a third party faced reporting blind spots, slow peak-hour transactions, and underused native features.



Need to know more?
Mark Bugay
markb@softype.com

The Difference



Still reconciling spreadsheets?
Still waiting on reports?
Still unsure if your numbers are right?

Our clients aren't.



What They Have Now

- ✓ Real-time **visibility** across their operations
- ✓ Fragmented systems unified under **one platform**
- ✓ Manual processes replaced with **automation**
- ✓ **Compliance** achieved and audit-readiness restored
- ✓ A system that scales with their **growth**
- ✓ Clarity and **confidence** in their numbers



Ready to Build Your Single Source of Truth?

Start with a conversation

