

**CARAVEL**

BPM Technology Solutions

# Customer **PROFILE**

## DirectBooks

**DirectBooks**  
OPTIMIZING GLOBAL FINANCING MARKETS

DirectBooks leverages its technology expertise and the market knowledge of its participants to optimize the communications process for primary issuances. Their innovative digital platform serves as a singular distribution point to manage communications across institutional participants, increasing efficiency and accuracy.

### Demographics

**INDUSTRY** Financial Services**HEADQUARTERS** New York, NY**FOUNDED** 2019**EMPLOYEES** 50+**EXISTING ERP** QuickBooks**OTHER SYSTEMS** Salesforce, Airbase, Fathom, TriNet, Bank of America, JPM Chase

### Sales Teams

**NETSUITE** Brendan Miller**CARAVEL** Scott Curry, Caila Cohen

### NetSuite Solution

**NETSUITE** SuiteSuccess Software STD**MODULES** Financials, Accounts Payable, Order to Cash**INTERFACES** Banking, TriNet, Airbase

### Implementation

**TIMELINE** 3 months**METHODOLOGY** SuiteSuccess + Optimization**APPROACH** DirectBooks will deploy NetSuite in a single-phase with core functionality going live in month 3 and integrating to various 3rd party systems in phase 1.

#### CONTACT US

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