



CARAVEL

BPM Technology Solutions

Point of Entry Expense Allocation Caravel's Shared Vendor Bill

Customer Success Webinar Series



Caravel Team Introductions



Jake Waters | Sr. Solution Engineer

- 5+ YEARS: General Accounting, Financial Management, Business Process Improvement, Statutory & Management Reporting
- 5+ YEARS: Enterprise Resource Planning (ERP) Software Implementation and Project Management
- 10,000+ HOURS: Software Implementation and Managed Services
- 150+ PROJECTS: Implemented; ~75% Full Cycle Implementations; ~50% as Lead / Solutions Architect
- SYSTEMS IMPLEMENTED: Oracle-NetSuite ERP
- VERTICAL EXPERTISE: Private Equity, Investment Management, Crypto, Healthcare



Tai Valenzuela | Director, Advisory

Over the last 20 years, I have established and optimized brand strategies, harnessed the power of digital platforms, and led cross-functional teams towards generating substantial revenue growth.



Meagan Hove | Director, Client Engagement

As Caravel's dedicated client engagement lead, Meagan has spent the last 10 years working on strengthening relationships between companies and their clients.





AGENDA

- 1 About Caravel**

- 2 Shared Vendor Bill Overview**

- 3 Module Configuration – Establishing preferences and account setup**

- 4 Live Demo – Vendor Bill Entry Processing**

- 5 Live Demo – Intercompany Distribution**

- 6 Live Demo – Review Accounting Impacts**

About **Caravel**



About Caravel



750+

**NETSUITE
IMPLEMENTATIONS**

9+

**VERTICAL
SPECIALTIES**

50+

**IP SOLUTION
BUNDLES**

1200+

**GLOBAL
EMPLOYEES**

1500+

**CONSULTING
PROJECTS**

150+

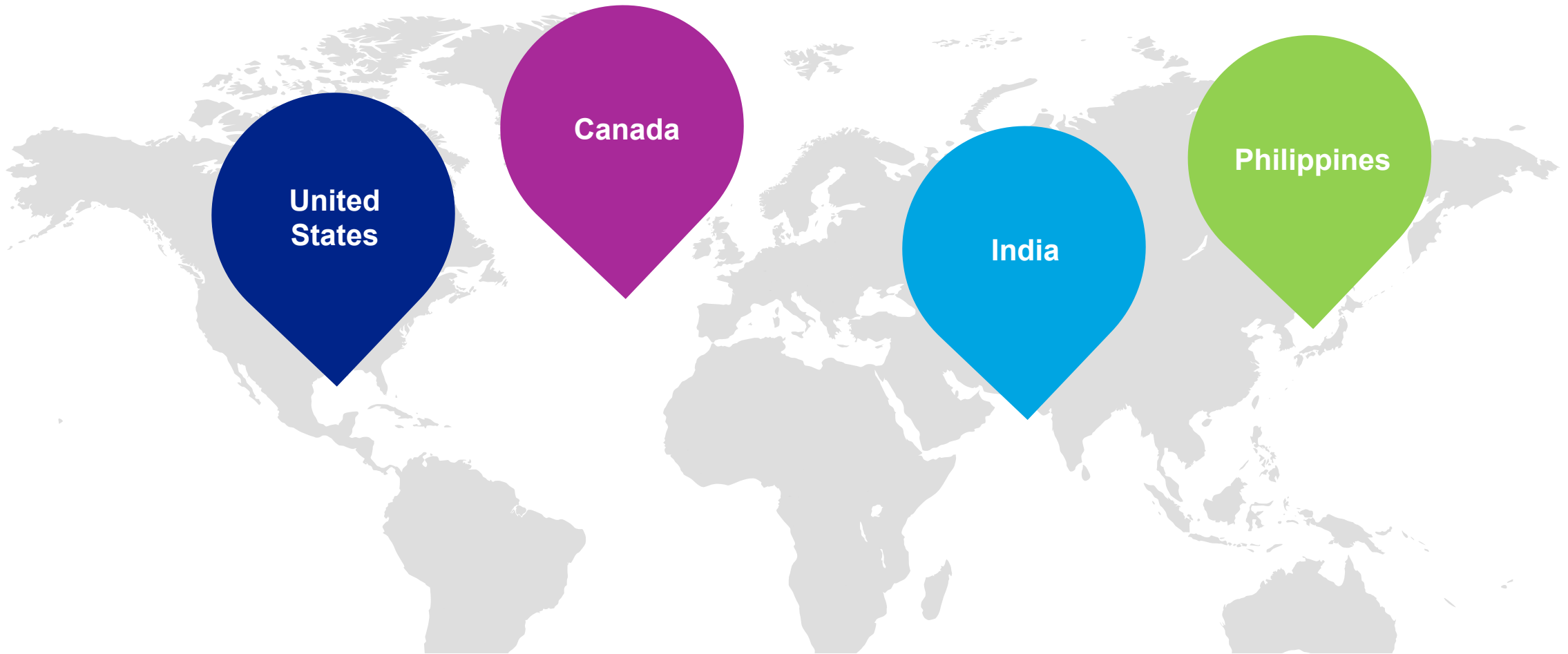
**MANAGED
SERVICES CLIENTS**

4

**GLOBAL
DEPLOYMENT
CENTERS**



FOUR Global Delivery Centers



Services

ADVISE



DEPLOY



SUPPORT



EXTEND



SVB Overview



SVB | Overview



Single point of entry for expenses across multiple subsidiaries



Customizable setup on an individual entity basis



End-to-end automated transaction processing



Supports integration with 3rd party AP Processing tools and approval engines



SVB Live Demo



Questions & Wrap-Up



Upcoming Webinars | Caravel Contacts



10/05/23

Automated Cash Application

10/26/23

Outsourced Accounting Services

11/09/23

NetSuite Analytics Warehouse

11/30/23

Partner Webinar | TBA

Caravel Contacts



Jake Waters, Sr. Solutions Engineer

jawaters@bpm.com

Tai Valenzuela, Director, BPM Advisory

tvalenzuela@bpm.com

Meagan Hove, Director, Client Engagement

mhove@bpm.com



THANK YOU!

