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

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.

Sales Teams

NETSUITE Brendan Miller

CARAVEL Scott Curry, Caila Cohen

ORACLE NETSUITE
PARTNER OF THE YEAR
2022
NORTH AMERICA ALLIANCE
PARTNER OF THE YEAR - SERVICES

ORACLE NETSUITE
PARTNER OF THE YEAR
2021
VERTICAL ALLIANCE OF THE YEAR
SERVICES

ORACLE NETSUITE
PARTNER OF THE YEAR
2020
REGIONAL ALLIANCE OF
THE YEAR - NORTH AMERICA

ORACLE NETSUITE
PARTNER OF THE YEAR
2020
VERTICAL ALLIANCE OF
THE YEAR - HI-TECH