

**CARAVEL**

BPM Technology Solutions

Customer **PROFILE**

Avenir Financial Federal Credit Union



Avenir Financial Federal Credit Union is a not-for-profit financial cooperative serving Yuma and La Paz counties. Established in 1942, Avenir Financial is Yuma's only community credit union. Guided by the credit union philosophy of "People Helping People", earnings are returned to members with generally lower or no fees for many services and competitive rates. Federally insured by NCUA.

Demographics

INDUSTRY Financial Services**HEADQUARTERS** Yuma, AZ**FOUNDED** 1942**EMPLOYEES** 79**EXISTING ERP** Correlation Keystone**OTHER SYSTEMS** Profitstars, ADP, Power BI

Sales Teams

NETSUITE Jim Wilson, Courtney Goetz**CARAVEL** Caila Cohen, Scott Curry

NetSuite Solution

NETSUITE FinancialsFirst STD**MODULES** Record to Report, Procure to Pay, Loan Management**INTERFACES** Banking, ADP, Power BI, Correlation Keystone, Profitstars

Implementation

TIMELINE 4 months**METHODOLOGY** SuiteSuccess + Optimization**APPROACH** Avenir will deploy NetSuite in a single phase with core functionality going live in month 4 and integrating to various 3rd party systems in phase one.

CONTACT US

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