



CARAVEL

BPM Technology Solutions

AMO | PE & PORTCO SERVICES

Caravel at a Glance.



Caravel, a part of the technology services group of BPM LLP, is an award-winning NetSuite Alliance partner with 25 years' experience providing strategic guidance, support, & deployment. It has spent the last two decades working with clients across North America ranging from SMB, Mid-Market to Enterprise and has completed over 750+ NetSuite Implementations for NetSuite clients. Caravel has operated across 9+ vertical specialties and has a number of specific IP solution bundles.

750+

**NETSUITE
IMPLEMENTATIONS**

150+

**MANAGED SERVICES
CLIENTS**

1,300+

**COLLEAGUES
COMPANY WIDE**

4

**GLOBAL OFFICE
LOCATIONS**

**US, CANADA,
PHILIPPINES & INDIA**

San Francisco
Bay Area
(Headquarters)

Southern California
(Irvine & Long Beach)

Central California
(Stockton)

Austin

Boston

Eugene

Fairfield

New York City

Seattle

Bengaluru

Cayman Islands

Philippines

Toronto

ORACLE
NETSUITE

PARTNER OF THE YEAR
»»»»»» 2023 ««««««

NORTH AMERICA ALLIANCE
PARTNER OF THE YEAR - SERVICES

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

VERTICAL EXPERTISE



HIGH TECH

SAAS, Software Internet Services,
High-Tech Manufacturing,
Advertising/Media



FINANCIAL SERVICES

Fin-Tech, Financial Services,
Insurance, Crypto, Lending,
Banking, Real Estate,
Private Equity



HEALTHCARE

Med-Tech, Pharmaceutical,
Clinics, Hospitals,
Wellness, Medical Device,
Medical Billing, Vet



PROFESSIONAL SERVICES

Consulting, Staffing,
Legal, Accounting,
Field Service, Maintenance



PRODUCTS

Consumer Goods,
Wholesale Distribution,
Retail, E Commerce, Food & Bev,
Brand Merch, Logistics



MANUFACTURING

High-Tech Manufacturing,
Discrete, Process, Industrial



RENEWABLE ENERGY

Solar, Battery, Wind,
Utilities, Field Service Mgmt



NON-PROFIT/GOVT/OTHER

Non-Profit, Government-DCAA,
A&D, Associations, Hospitality,
Agriculture, Franchise, Sports



CONSTRUCTION

Residential,
Commercial, Solar

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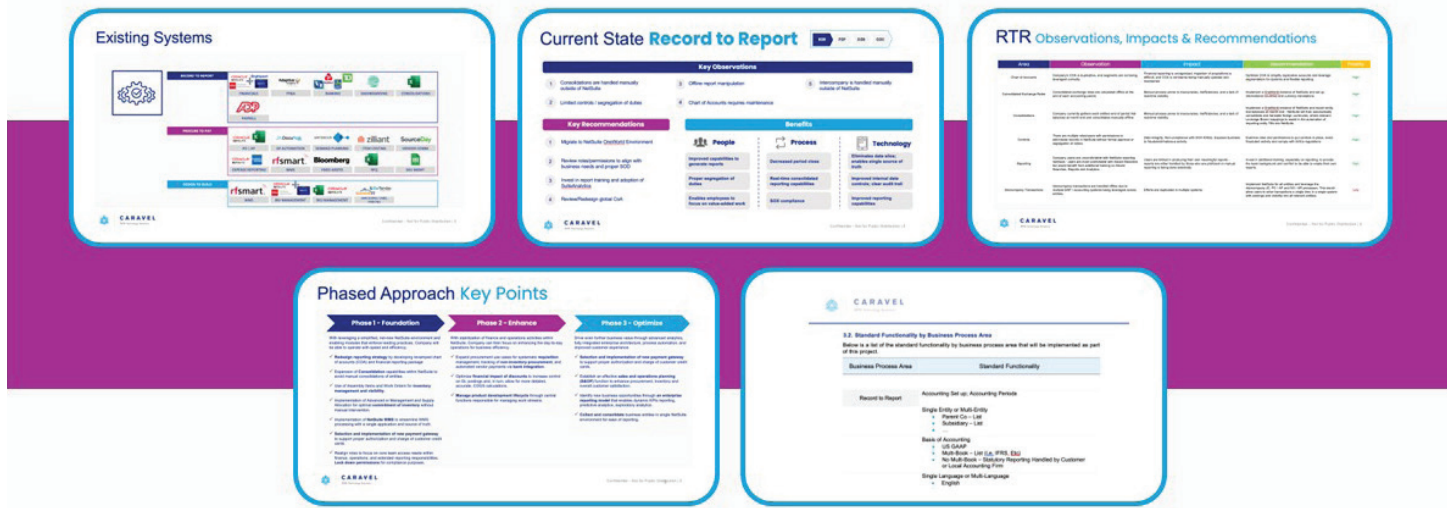
CARAVEL
BPM Technology Solutions

NETSUITE ASSESSMENT, OPTIMIZATION AND REMEDIATION SERVICES

NetSuite Business System Assessment

Drive More Value to your Business from your NetSuite Investment.

Caravel helps companies objectively evaluate, analyze and optimize its business processes and NetSuite environment. The Business System Assessment (BSA) is designed to quickly help Customers review their business processes, business requirements and ensure they are properly aligned to their NetSuite environment including other ERP impacting systems and process flows. The goal of the BSA – define requirements, identify business process optimization areas, review existing NetSuite configurations and integrations, build a remediation plan inclusive of a step-by-step guide toward optimization and provide a recommended sequence, timeline and cost to remediate.



NetSuite Optimization, Remediation, and/or Re-Implementation

Efficiently Fixing your NetSuite Environment from Remodel to Rebuild.

Caravel works with clients to determine the best route toward optimizing their NetSuite environments. The use case driving the optimization or remediation effort in conjunction with the actual optimization needed will drive the best path forward (i.e. removal of technical debt and customizations, entity expansion, organization merges, module expansion, data clean-up, integration, reporting, workflow, etc.). Caravel has a pre-built framework toward assessing as outlined under its BSA framework and carries over to its optimization, remediation and reimplementation framework. Caravel's step-by-step approach, pre-built templates, tools and PMO framework ensures that business goals, timelines, and budgets are met and adhered to.



NetSuite Application Extension, Workflow and Integration Services

Increase Business Velocity by Extending, Automating, Integrating your NetSuite Environment.

Caravel offers various integration related services ranging from integration specification, integration development, integration optimization, SuiteApp configuration and ongoing integration support and maintenance. Integration services range between semi-automated SFTP-based integrations to fully automated middleware or direct API-based integrations.

Application Extension. Caravel's technical team has decades of experience extending NetSuite applications in a manner that is supportable long term, survives upgrades, and avoids the build-up of "technical debt". Those areas of extension include but are not limited to the following:

- User Defined Fields
- Custom Record Definition
- Custom Automation via Native NetSuite and Salesforce.com Tools
- Tailored and Custom Reporting
- Tailored and Custom Dashboards

Workflow Automation. While NetSuite's applications come with native workflow automation, most clients require the tailorization of those native workflows or the creation of new workflows to manage the movement of data based on various contingent criteria. Caravel's technical team has vast experience in creating workflow automation that "make sense" and helps drive visibility and process velocity.

Integration. Caravel has been integrating systems for over two decades. NetSuite's native tools (import/export) and Open API architecture allow Clients to easily ingest or transmit data. Caravel has a team of technical integration architects that are versed in various platforms and different integration methods to ensure that there is a proper alignment of integration need to the correct integration tool and approach.

- **NetSuite SuiteApp** – Caravel is well versed in many of NetSuite's SuiteApp Partners who have pre-built interfaces with NetSuite. Caravel can assist Customers in configuring and testing those SuiteApps.
- **NetSuite Adapters** – Like SuiteApps, Caravel is well versed in many pre-built adapters to various systems and can assist clients in the configuration of those adapters as well as testing.
- **SFTP Loaders** – Caravel has custom built SFTP loaders that it shares with Clients to help facilitate semi-manual integration.
- **Custom Interface Development** – Caravel's technical team has years of experience developing custom interfaces ranging from low complexity / low volume to high complexity / high volume. While Caravel can write custom API integration, Caravel's preferred method of integration is to leverage middleware tools that provide a more seamless and supportable integration experience. Some of the more common platforms that Caravel leverages is Celigo, Boomi, Workato and MuleSoft.

CONTACT US

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OTHER OPTIMIZATION SERVICES

Do More with your NetSuite Environment!

Salesforce.com Assessments and additional services

Caravel has strong Salesforce expertise and can deploy net new Salesforce, as well as optimize and support NetSuite integrations with Salesforce. In addition, Caravel offers a Salesforce Assessment. This is designed to help customers justify the need for an enhancement/optimization of existing Salesforce products – define requirements, identify optimization areas, develop technology roadmap, build the enhancement timeline and provide an overall ROI for the project.

FP&A as a Service

Caravel offers FP&A as a Service to help clients manage their existing NetSuite Planning and Budgeting or Workday Adaptive environments. Services include but are not limited to:

- System Administration
- Annual Budget Creation and Approval
- Monthly Re-forecasting
- Monthly Financial Reporting

Sales Ops as a Service

Caravel offers Sales Ops as a Service to help customer manage, optimize and maintain their Salesforce.com environment. Additional services include but are not limited to:

- Monthly Forecasting
- Sales-Based Reporting
- User Management
- Territory Management

Outsourced PMO

Caravel offers PMO services to help customers manage technology and non-technology related projects. Caravel brings PMO related tools, templates and experienced professionals to help customers manage simple to complex projects – ensuring on-time delivery and budget adherence.

Accounting Rationalization

Caravel offers accounting rationalization services, which is a review of existing accounting processes focused on improving operational metrics, expediting period close, reducing DSO, reducing revenue leakage and improving vendor onboarding processes and internal controls.

Outsourced Accounting

Caravel has an accounting team that can support with temporary, full-time or project by project basis resources across outsourced accounting, technical accounting and compliance (SOX, HIPAA, ISO etc). Examples where this can be leveraged could include:

- Place temporary accounting support to help with bandwidth issues
- Place temporary accounting support for the duration of a project to free up staff to help with this work
- Provide a full outsourced accounting function for clients who want to move away from their existing outsourced accounting firm

Cybersecurity

Caravel offers cybersecurity services to help assess, establish and deploy a cybersecurity infrastructure. Our independent team evaluates your organization by imitating the very techniques currently used by real-world attackers. By following BPM's risk-prioritized recommendations and applying controls where threat actors are most likely to exploit your organization, a penetration test can save your organization money, resources, and embarrassment.

Data Cleansing and Migration Services

Caravel offers various data migration and cleansing programs to pull data from existing ERP and CRM systems. As part of this process, services range from semiautomated to fully automated cleansing and migration services. The goal is to assist clients in being able to entirely retire legacy or SaaS based systems no longer in use. ERP migration services start at \$15,000 and CRM migration services start at \$30,000.



Honest to a Fault

The consulting industry is plagued with firms willing to take advantage of a customer’s inexperience around budget, deployment timeline, and software knowledge. At Caravel, we are upfront and honest about everything. The reality is that implementing enterprise business applications (if done right) takes time and money. Caravel would rather forfeit jobs to other firms promising cheaper pricing and unrealistic timelines than cut corners and costs at the detriment of the customer. Our goal is to meet customer expectations on Day 1 by finding the best fit for an implementation, helping to set customers up for success from the start.



FULL-SERVICE FIRM.




EXPERTISE.



TEAM.

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