

**CARAVEL**

BPM Technology Solutions

CUSTOMER PROFILE

Industry: FINANCIAL SERVICES

Security Properties



For over 50 years, Security Properties has provided both quality housing to its residents and excellent financial performance for its investors and partners.

HQ: Seattle, WA **Founded:** 1969 **Employees:** 200

Existing ERP: N/A

Other systems: ERP Timberline Bill Pay AvidExchange Expense Reporting Certify FP&A Excel Payroll Dayforce – potentially could change Bank(s) JP Morgan Chase Revenue Platform Entrata

Customer Challenges: Consolidations - disparate data between systems, AP insight (issues with COA and segmentation)

Deal Competitors: Intacct

Why we Won: Competed with Intacct - great win due to minority interest and construction IP

Caravel teams:

Kelly Gonyea, Rob Cupka

NetSuite Implementation

NetSuite sales team: Maddy McKay, Doug Nelson

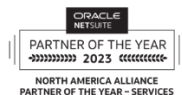
NetSuite: Financials First

Methodology: Suite success and optimization

Modules: Record to Report, General Ledger, Financial Management Procure to Pay, Accounts Payable, Fixed Asset Management Project to Cash, Project Management, Costing, Task Management Optional Modules (If Selected in Section 7.1), Accounts Receivable, NetSuite Planning & Budgeting, Smart View BPM SuiteBundles, Non-Controlling Interest, Construction Management

Interfaces: Banks: Multiple, Payroll - Dayforce, Tax - Avalara, Expense Reporting - Certify, Property management - Entrata

Approach: Single phased implementation with NetSuite with multiple integrations including suite apps and SFTP files.

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