



# 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:** 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.

**NetSuite sales team:** Maddy McKay, Doug Nelson



### CONTACT US:

714-253-4455 or [info@caravel-partners.com](mailto:info@caravel-partners.com) | [caravel-partners.com](http://caravel-partners.com)

**CONTACT US:**

714-253-4455 or [info@caravel-partners.com](mailto:info@caravel-partners.com) | [caravel-partners.com](http://caravel-partners.com)