



Industry: SERVICES

Synergist



Synergist Technology is the creator of AFFIRM, a purpose-built AI Management System (AIMS) designed to help organizations adopt, govern, monitor, and scale AI with confidence.

HQ: Boca Raton, FL **Founded:** 2024 **Employees:** 30

Existing ERP: QuickBooks

Other systems: HubSpot, Zoho

Customer Challenges: DCAA Compliance along with Subscription billing needs

Deal Competitors: Deltek, Intacct

Why we Won: N/A

Caravel teams:

Corey Ruane, Rob Cupka

NetSuite Implementation

NetSuite sales team: Leanne Duncan, James Iovan, Anna Mager

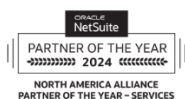
NetSuite: Financials First

Methodology: SuiteSuccess

Modules: Project to Cash, Procure to Pay

Interfaces: Banking, Expense Reporting, CRM

Approach: Synergist Technologies will deploy NetSuite in a single phase with all functionality going live in 4 months and integrating to various 3rd party applications



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