

**CARAVEL**

BPM Technology Solutions

Customer **PROFILE**

UniVista Insurance



UniVista Insurance specializes in providing affordable and innovative insurance solutions throughout South Florida for over 10 years. Whether it is auto, home, commercial property, life, health, or annuity products, UniVista allows their customers to prepare and protect their life. One of the company values is to build lifelong relationships by delivering not only affordable insurance but also personalized services.

Demographics

INDUSTRY Financial Services**HEADQUARTERS** Miami, FL**FOUNDED** 2006**EMPLOYEES** 300+**EXISTING ERP** QuickBooks**OTHER SYSTEMS** Bill.com, MS Excel, QuickPay, Banking, PowerBI

NetSuite Solution

NETSUITE SuiteSuccess FinancialsFirst STD**MODULES** Record to Report, AP Invoice to Pay, SuiteAnalytics Connect**INTERFACES** Banking, Amex, QuickPay, Bill.com, Proprietary Operating System, PowerBI

Implementation

TIMELINE 4.5 months**METHODOLOGY** SuiteSuccess + Optimization**APPROACH** UniVista will deploy NetSuite in a single-phase with core functionality going live in month 5 and integrating to various 3rd party systems in phase 1.

Sales Teams

NETSUITE Connor Ostrowski, Marta Budzikowska**CARAVEL** Scott Curry, Caila Cohen

CONTACT US

info@caravel-partners.com | 714-253-4455 | www.caravel-partners.com