

# EPICOR ADDS NEW EFFICIENCIES AFTER MIGRATING TO FLOQAST FROM LEGACY CLOSE MANAGEMENT SOFTWARE

## EPICOR

### ERP

Epicor

### TEAM

50 (Americas)

### WHY FLOQAST

- Existing legacy financial close solution was not addressing current business needs
- Needed heightened visibility into an internationally-distributed accounting department's operations
- Desired a user-friendly, easy-to-setup close management solution
- Wanted an Excel-based close management solution it could implement quickly

### RESULTS

- Established a new level of accountability that didn't exist previously
- Took advantage of new features unavailable on the previous close management solution, making the team more efficient
- Provided leadership more visibility into its team's operations

*With more than 20,000 customers in over 150 countries, Epicor is a leading software developer of business software providing Enterprise Resource Planning (ERP) solutions primarily for manufacturing, distribution, retail, and service industries.*

Managing a large team of accountants is never easy, especially when those accountants are distributed across numerous offices in several countries. So when the current financial close management software the company leans on to facilitate operations isn't meeting expectations, it's time to consider a change.

"FloQast provides me the oversight I need, and desired assurances. Implementing FloQast has definitely improved the team's life and its process. It's made them more accountable, which is a tremendous benefit to the company."

**URIAH WELLS**  
CORPORATE CONTROLLER

**EPICOR**

Epicor employs a team of over 50 accountants responsible for the Americas and is dispersed across the United States, Canada, and Latin America. With this type of workforce, cross-team organization and communication is a top priority. Epicor's Accounting team demands close management software that is not only effective and consistent but also, user-friendly.

After two years of growing dissatisfaction with their legacy close management software, Corporate Controller, Uriah Wells, and Senior Accounting Manager, Christopher Alvarez, concluded that a change was in order. The team needed a system that was organized and comprehensive, and the legacy solution was not checking those boxes.

“Our team requires an efficient, user-friendly product that contributes to a streamlined close process. Ultimately, the software we had in place was not meeting our needs due to its perceived complex features and difficult user interface,” said Alvarez.

## Finding the Right Fit

As Epicor evaluated replacement close management solutions, Wells and Alvarez assembled a diverse group of team members with the intent of identifying specific features the ideal replacement needed to possess. This process was simplified by the team reviewing how they had been using the legacy close management software and looking for what was missing.

“We needed something that was easy to use, functioned well with Excel, and was simple to set-up,” said Wells. “Ultimately, we want to transition our international team to using close management software, and with our previous close management solution, there was just no way that could happen. Given the nature of the platform and the number of steps, it really didn’t provide me with the oversight on the status and what I’d like to see from corporate headquarters’ standpoint.”

As the transition from their legacy software to FloQast began, Wells and Alvarez were immediately impressed with the collaborative nature of the relationship between Epicor and FloQast.

“We instantly felt validated after early interactions with FloQast,” said Alvarez. “They listened to our needs and treated us as partners. There was genuine communication between us and them.”

To get off to a fast start, several members of the FloQast Customer Success and Product teams visited the Epicor office to aid in the rollout and answer any questions. According to Alvarez, this laid the foundation for a simple and quick implementation process.

“The FloQast team came to our office for a face-to-face introduction. This meeting was very positive and set the tone for our relationship. Not only were we able to meet with members of the Customer Success team, but we met with someone from the Product Development team. Establishing this early trust allowed for a productive and comfortable working relationship. Throughout the process, we felt supported by the Customer Success team. I largely contribute the successful implementation of FloQast to the relationship we developed with their Customer Success team.”

“It’s nice to not feel like we’re just a number,” he added.

## Accountability Leads to Assurance

Given the distributed nature of Epicor’s accountants, FloQast offers a level of visibility that benefits the users, as well as their managers.

Within two months of implementing FloQast, we saw a change in how our accountants were responding to the close process. The buy-in from our teams was readily apparent and people were more engaged with the system — what more could we ask for?”

**CHRISTOPHER  
ALVAREZ**  
SENIOR ACCOUNTING  
MANAGER

**EPICOR**

“Using FloQast unifies the team,” said Wells. “It has helped our process be more consistent because it is all in one place. FloQast provides me the oversight I need, and desired assurances. Implementing FloQast has definitely improved the team’s life and its process. It’s made them more accountable, which is a tremendous benefit to the company.”

In the end, it did not take Wells and Alvarez long to identify the positive impact of FloQast.

“FloQast was built for companies that work in an Excel environment and the software is very intuitive. Within two months of implementing FloQast, we saw a change in how our accountants were responding to the close process,” stated Alvarez. “The buy-in from our teams was readily apparent and people were more engaged with the system — what more could we ask for?”