Support for a Diverse Product Line & Global Customer Base

Epicor

Whether at a gas station, business park, or shopping mall, chances are you have used an automatic teller machine (ATM) branded by Companion Systems. The company is the leading provider of branded ATM surround, kiosk, enclosure and signage solutions for the financial services industry.

An industry pioneer, Companion Systems launched the ATM surround and enclosure industry by creating the first branded ATM surround over 30 years ago. Since then, Companion Systems has continued to lead the industry in developing innovative ATM solutions to meet the needs for thousands of financial institutions, including Bank of America, Citigroup, Wells Fargo, PNC, Chase, Key Bank, US Bank, Union Bank, and VISA. The company also partners with the world's leading ATM hardware and software manufacturers including Diebold, NCR, Nautilus Hyosung, Wincor-Nixdorf and Tranax.

To support its diverse product line and global customer base, Companion Systems looked to Epicor to streamline manufacturing operations, including the product configuration and unit of measure conversion process. The company recently deployed Epicor's next-generation enterprise resource planning (ERP) software solution.

Enabling Customized Product Offerings and Accurate Costing

Like many companies in the manufacturing industry, Companion Systems was challenged with managing the growing number of product variants and offering the right product to meet each customer's needs with accurate and competitive pricing. As the company soon found out, when it comes to big-picture business issues such as this, the devil is in the details.

"We did not take changes in conversion code and units of measure seriously enough, and did not recognize the impact this would have in our downstream processes," explained Jason Hepworth, controller for Companion Systems. "We had to correct this data manually, which slowed things down. Epicor has a full matrix that is much more robust and makes units of measure meaningful without the need

to manually enter in data."

As beta test site, Companion Systems was able to closely work with Epicor on customizing the product, including driving changes to the product configurator feature to make it easier to manage projects.

Given its multiple product lines, to provide its customers with accurate and competitive cost estimates, Companion Systems must stay constantly on top of price fluctuations with its thousands of raw components – such as petroleum-based materials (resins, paints) and metal materials (steel, aluminum) – that comprise its finished products.

"We started with an annual review of the standard costs and it became apparent that this wasn't frequent enough," said Hepworth. "We learned very quickly that almost all variances were being driven by pricing or costing issues."

The solution to this issue came via Epicor's sales management functionality. By streamlining the sales process and centralizing access to product, pricing, pipeline, and customer information Companion Systems was able to improve estimate accuracy and reduce the overall quote-to-cash cycle to ramp up sales productivity.

Today, Hepworth says costing is much closer to the actual price of the jobs because of Epicor. There are no variances for analysis, and Companion Systems is able to close its monthly financial reports faster, so that vital financial information can be disseminated sooner, providing vital insight to help manage and run the business profitably.

In addition to accurate costing, Companion Systems is able to get needed data to its customers faster and in the customer's chosen reporting format.

"It is very easy for us to create dashboards, run them and export to Excel and e-mail to a customer in a moment's notice," said Hepworth.

Improved Operational Efficiencies and Big Bottom-Line Results

Epicor is used across all departments at Companion Systems, including Engineering, Accounting, Customer Service and the Shop Floor. And while everyone has access to the same "version of the truth," all users on the system can drill down to get exactly the information they need to support their business role.

"Before Epicor, we had a home-grown platform and it was not congruent or customizable," said Hepworth. "Actions that took two people a half-hour to an hour before now take five minutes."

Hepworth said the process improvements using Epicor have paid off handsomely in return on investment.

"Since the migration to Epicor, we have nearly tripled our sales volume and have been able to manage the increased data flow without any problems. What's more,

we've been able to do so without increasing our headcount."

Forging a Partnership for the Future

Hepworth said the support Companion Systems received from Epicor was "over the top" and looks forward to working with the company on future ERP migration projects.

"During the move to Epicor, the company's support team was available to us 24 hours a day and kept us up-to-date throughout the process," said Hepworth. "The support has been phenomenal."

Empowering Users through Education

The process of educating users was very important to Companion Systems, which is why the company bought the Epicor 9 core education subscription including manufacturing-focused embedded courses, as well as user guides and classroom courses a la carte. "We purchased and used all of the excellent education and documentation content Epicor provided, as education is a lifelong experience for our company," said Hepworth. "Likewise, we feel that educating the team, or training the trainer, is very important to a successful ERP implementation."

Companion Systems utilized all of the resources available to them during their implementation, including involvement in the Beta program and Beta online courses, and Application Help and Field Help functions, which are embedded in the Epicor ERP solution. But the education process didn't end at implementation. Companion Systems followed-up with sending department leads to attend Epicor run courses, and all new users to the system attend an in-house "Knowledge Camp" created by Companion Systems.

"We learned that training your people both before and after an implementation is the best way to achieve success," Hepworth concluded.

To learn more about Epicor ERP Solutions, visit www.epicor.com *[1].*

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