

EPICOR

Coast Counties Peterbilt

Doubled AP productivity, admins time freed to perform value-added support

Coast Counties Truck & Equipment, Co.



Since 1949

Company Facts

Overview

- **Location:** San Jose, California
- **Specialist Industry:** Commercial Truck sales, parts & service
- **Website:** www.coastcounties.com

Success Highlights

Challenges

- Inefficient paper-based AP system
- Lack of centralized AP visibility
- Staff tied to mundane tasks

Solution

- Epicor® ECM (DocStar)
- Epicor Intelligent Data Capture (IDC)

Benefits

- Trimmed AP headcount by more than half
- Reduced data entry workload by 90%
- Helps to create higher-value opportunities for employees

Steering toward efficiency

Founded in 1949, Coast Counties Peterbilt is the oldest family-owned and operated Peterbilt dealership in the world. The company is a full-service heavy-duty truck and trailer dealership, providing comprehensive offerings for truck & trailer sales, truck leasing & rentals, parts & services, as well as a complete financing portfolio. Today, nearly 200 employees serve customers from seven locations across Northern & Central California.

In 2017, several long-term employees working in accounts payable were preparing to retire, prompting the company to evaluate its personnel replacement strategy. Mike Sorensen, General Manager at Coast Counties Peterbilt shared, “Deploying technology to drive efficiencies is one of our key pillars. In addition, our ownership was on moving toward a paperless workplace. So, looking to solutions to absorb and automate workloads made a lot of sense.”

Sorensen, along with Coast Counties Peterbilt’s Dealer Operations Executive, Troy Magness, and the company’s AP Manager, Kim Nguyen, reviewed several options and selected Epicor ECM (DocStar) and Epicor Intelligent Data Capture (IDC). A primary driver for choosing Epicor was its tight integration with Karmak Fusion, the software platform designed to handle the heavy-duty demands of operating in the commercial transportation sector.

Seamless AP automation

Together, Epicor and Karmak Fusion delivered enhanced productivity, agility, and cost savings to Coast Counties. An advanced API provided a streamlined user experience that eliminated non-value-added activities associated with invoicing, virtually eradicating keystroke errors and diminishing the company’s reliance on paper.

“We had five-and-a-half AP personnel before Epicor. Through attrition—not layoffs—we reduced it to three employees. During the same period, we onboarded two new locations, neither of which has an administrator on-site,” Sorensen acknowledged. Magness added, “At the same time, the AP volume at our existing five locations increased by 25%. Epicor’s integration with Karmak has enabled all of that.”

Magness continued, “Epicor IDC minimizes the amount of typing required for processing invoices and automatically extracts from PDF invoices. Hence, our data entry workload has been slashed by about 90%, and errors have been all but eliminated. And our paper usage has dropped at least 80%”

Other KPIs are just as impressive.

“Our administrative staff is no longer chasing invoices. Now, they are supporting leadership in more meaningful ways which translates to both higher value to the company and a clearer growth path for employees. Instead of admins, we now have department coordinators who can be promoted to assistant manager, even manager.”

— Mike Sorensen, General Manager, Coast Counties Truck & Equipment Co.

Metrics to boast about

Prior to Epicor, the AP team manually processed approximately 2,500 invoices a month, a massively time-consuming effort. Today, the smaller team runs more than 3,000 invoices using Epicor ECM integrated with Karmak. Invoice review and approval processes have been automated, and the system flags any duplicates, helping ensure records are accurate.

Filing and file retrieval time were trimmed by 90% and copying/faxing/emailing time slashed by more than 80%. Contributing to the success is Magness' collaboration with the Epicor team. He noted, “During the implementation, I worked closely with Epicor to review our workflows and mirror or enhance our processes. An example of customization we designed was an automatic group routing, so managers only get their invoices, rather than having to wade through all invoices. This saved a ton of time.” Coast Counties Peterbilt suppliers are also paid in a timelier fashion, furthering the company's goal of reinforcing, and investing in its partnerships.

“There are occasions when we must go outside our standard inventory, creating miscellaneous POs (MPOs),” said Magness. “Traditionally, this has caused delays in getting those products invoiced because we need to chase MPOs. With Epicor, we can invoice the customer much faster, sometimes even as quickly as the day the job is done. It's a significant productivity boost.”

Because Epicor has enabled Coast Counties Peterbilt to centralize AP in the San Jose headquarters location, efficiency has soared. In the past, filing cabinets at every location stored local documents, or the branch admin would need to contact San Jose to pull the paper file, make a copy and e-mail it. Today, all of the parts and service managers have access to Epicor to pull invoices, process returns and efficiently dispatch other tasks.

Clearer line of sight

Another major benefit is enhanced visibility. Sorensen revealed, “One of the biggest complaints we had from our department managers, who are responsible for their P&Ls, was that they couldn't ascertain what they were being charged. There were always a lot of questions. With Epicor, everything is in one central location, and everyone can see exactly what they are being charged to the specific G/L. No more confusion & full transparency.”

Similarly, if Coast Counties Peterbilt's ownership has a query while signing checks, it's a simple matter of typing in an invoice number with no more stacks of paper being transferred about. Month-end AP closing is streamlined as well. “Prior to Epicor, the process was a bit slow and there was no way of knowing how accurate the data was. Now, we can run a report and be confident all open invoices are captured. It's tremendous visibility and conviction,” Sorensen highlighted.

EPICOR

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