

CLIENT SUCCESS STORY

Pattison Sign Brings Collections Online With Epicor Cash Collect



Pattison Sign Group
Powering Your Brand

COMPANY CHALLENGES

- Too much time spent on manual processes
- No centralized location for visibility across teams

LOCKSTEP SUCCESS

- Created visibility for team members

Collections Recipe

Keeping track of where every account was at in the AR processes was extremely manual. Linda Boucher, Credit Manager at Pattison Sign, described it as having “recipe cards” for each account. Each account had their own recipe card with the account information, such as key contacts, address, and phone numbers, as well as notes from every phone call a collector had with them.

Whenever a collector needed to perform an action on an account, such as make a phone call or send an email, they would have to search for the recipe card in a filing folder in the office. When they completed the action, the collector would note this on the recipe card.

Additionally, the team in Toronto was using Excel spreadsheets and Outlook to manage all of their accounts, making the process even more manual and siloed to an individual’s own desktop.

Automating Collections Workflow

Pattison Sign saw the impact of moving to a centralized collections activity management solution and off of their recipe cards, Excel sheets and Outlook with an immediate improvement to their DSO. Even when the Covid-19 pandemic forced everyone into lockdown, Epicor Cash Collect allowed them to maintain the improvements they gained. The Pattison Sign AR team was sent home to continue working remotely, and without Epicor Cash Collect they would not have been able to operate efficiently.

Company Facts

WEBSITE

www.pattisonsign.com

LOCATION

Toronto, ON

Knoxville, TN

INDUSTRIES

Manufacturing

ERP

Epicor E10

About Pattison Sign

Pattison Sign is a full-service sign manufacturing company in North America, with locations in Tennessee and Ontario. They specialize in creating electronic message centers, LED displays, digital signs and traditional signage. Pattison Sign takes care of signage need from beginning to end, manufacturing, installation, on-going maintenance and repair for some of the most well-known brands worldwide.

With two locations managing accounts receivable, visibility for all team members was limited. Pattison Sign needed to find a tool that could give them a centralized location to store customer accounts receivable information.



“When the pandemic happened and I had to work from home, I would have had to use a truck load just to bring all these recipe cards to my home office,” Linda explained. “With Epicor Cash Collect, it made it possible to work remotely because everything I needed was online.”

Epicor Cash Collect allowed Pattison Sign to keep all of their account information in one place that was accessible anywhere at any time for the entire team. Linda assigns accounts to her team to follow up where they have visibility into key information like contacts, credit history and past payment behavior. The team can see what past communications have occurred and quickly pick up where they left off, even from home.

During the lockdown stage of the pandemic, one of Linda’s teammates was out on sick leave. She explains that if they had still been using recipe cards and working from home, she would have had no insight into what her teammates relationship with the customer looked like, where she was in her collections process or what the customer’s typical payment behavior was. However, with Epicor Cash Collect Linda was able to immediately pick up where her teammate left off and help out to ensure all of her accounts were still being followed up on and cash was still being collected.

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With Epicor Cash Collect, it made it possible to work remotely because everything I needed was online.

Linda Boucher

Credit Manager, Pattison Sign



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