EPICOR
Caymas Boats

Company Facts

Overview

- Location: Ashland City, Tennessee, US
- Industry: Boat manufacturing
- Website: www.caymasboats.com

Success Highlights

Challenges

- External consulting was needed with technical expertise to change Excel reports
- Need to modernize the reporting process
- Need a more user-friendly, user-serviceable reporting solution
- Reduce manual work

Solution

- Epicor® Kinetic ®
- Spreadsheet Server

Benefits

- Time savings of up to 15 hours per month
- Fantastic user serviceability
- Fast analysis with sophisticated drill-down

Fishing Boat Manufacturer Finds Success with Spreadsheet Server and Epicor

Reeling in Time and Cost Savings

Caymas Boats was looking to modernize its reporting process and reduce manual work and reliance on costly third-party consultants.

Caymas Boats, founded by legendary boat racer Earl Bentz in 2018 in Ashland City, Tennessee, is a manufacturer of high-quality, custom fiberglass fishing boats. Supplying both saltwater and freshwater boats, the company is experiencing increasing demand, and recently began building a new factory in order to increase capacity.

The Challenge

Before implementing Spreadsheet Server, Caymas Boats was using Epicor ERP's standard reports alongside Epicor XL Connect, a Microsoft® Excel® add-in, for their more in-depth and custom reporting needs. Tyler Smith, Senior Accountant at Caymas Boats, says that while the team liked using Epicor XL Connect, when it came time to create or modify their reports, they had to rely on outside consultants because report writing still required a level of technical expertise.

Paying outside consultants to manage their reports just wasn't sustainable for the company—no matter how skilled your technical consultants are, it's impossible for them to know and understand a business as well as the people who work there every day, which slows the process down, so paying hourly rates to consultants would have been "very expensive" according to Smith. Instead, Smith and the team found themselves resorting to data dumps into Excel where they could manually configure and format the reports they needed, choosing to sacrifice only time, rather than both time and money.

> "It's been a spectacular upgrade. Drill-downs in Spreadsheet Server work flawlessly alongside Epicor."
>
> Tyler Smith, Senior Accountant at Caymas Boats

The team was looking to "upgrade their technology," and knew that they "couldn't service XL Connect much longer," says Smith. They liked that XL Connect leveraged their existing Excel skills, but they wanted something that was more user friendly and intuitive. As they looked for a new solution, Smith recalls that the team saw Spreadsheet Server mentioned in one of Epicor's newsletters and decided it could be right for them.

Building to Success with Spreadsheet Server and Epicor

Caymas Boats was able to join an early adopter program to implement Spreadsheet Server from insightsoftware, being among the first cloud customers to use the product. Within "just one training session" with Spreadsheet Server, Smith was able to "convert all his reports over from XL Connect" and could see value within a couple of days of implementation.
Smith notes that the support teams were "flawless" and "have been incredibly supportive".

The process was "one of the best-run implementations (Smith) has ever seen," with "fantastic" training tools and tips sheets provided alongside the training session. "It's been amazing for someone who is uneducated on the product," says Smith.

Spreadsheet Server extends the reporting capabilities the Caymas Boats' team enjoys with Epicor ERP, allowing them to "get more out of Epicor, faster," thanks to improved performance in Excel and the accessible nature of the reporting solution. Smith says that because Spreadsheet Server is a more user serviceable reporting tool, "It's much easier to find and add accounts into the GL."

Smith purports that the increased convenience and ease of use Spreadsheet Server provides his team translates to greater efficiency and, ultimately, time savings. Caymas Boats has also not only reduced their average monthly reporting time by about an hour, but Smith also says that Spreadsheet Server can save them up to fifteen hours when adding in a new GL account.

Smith is better able to see the new things happening in the business, without waiting or needing to be briefed by everyone involved, as Spreadsheet Server not only "tells us if the statements don't balance," but also helps direct him to where the change has occurred. Smith describes looking for changes in financial statements prior to Spreadsheet Server as "looking for a needle in a pile of needles."
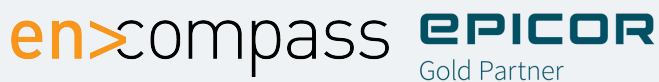
Additionally, Smith notes that the monetary savings from having a truly self-service reporting tool are readily apparent as "consultants are expensive, and don't know about our system." With Spreadsheet Server, Smith's team has been able to easily recreate and distribute the reports to senior management, keeping them in "the format our management team likes."

Now that they have completed the program, Smith is "looking forward to wrapping up testing and fully rolling out Spreadsheet Server."

Navigating Success

Caymas Boats has seen a number of improvements as a result of implementing Spreadsheet Server, including:

- Time savings of up to 15 hours: Get more out of Epicor, faster
- "Fantastic user serviceability": Easy for the team to get up and running and realize value
- Fast analysis with sophisticated drill-down: "Much faster to find and add accounts into the GL"

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