Ready to Migrate to Epicor Financial Planning and Analysis (FP&A)?

Get the insight advantage with data-driven solutions.

At Epicor, we strive to exceed expectations every day. One of the ways we accomplish this is by streamlining the many processes businesses need to drive results. Epicor is committed to providing you with a practical, industry-leading solution that improves efficiency while showing you—simply and clearly—how to manage your business effectively.

Epicor FP&A is our recommended solution for reporting and budgeting, as it forms a critical part of our larger and more long-term BI and reporting strategy. Epicor FP&A's cloud-focused, unified platform helps you gain the advantage in competitive markets:

Product
- Conceptualized and designed to be in the cloud
- **Financial process streamlining and automation** are at the heart of its core architecture
- Integrates with P21, Kinetic, Enterprise, Epicor ERP, Epicor iScala, and select non-Epicor systems
- **User-friendly, flexible,** designed specifically for **finance users**
- Deployed in the cloud
- Full FP&A solution—**unified platform** for reporting, budgeting & planning, and consolidation

Services
- **Quick implementation** time
- Customers will always have a single point of contact
- **Handholding** in the initial phases to help ensure understanding and quick adoption
- **Best practice methodology**
- Supported by Epicor PS
- **No technical/querying demands on all users**
- **Attentive global support**

Business Practices
- **SaaS pricing** with volume discounts
- Four different SaaS packages to choose from + add-on modules
- Special package for customers migrating from AFR or XL Connect
- **Customer satisfaction** is top of mind
- **Scalable** and upgradable because of its modular nature

Customer Experience
- Fully **owned** by Epicor
- Drives cross functional improvements that go beyond just finance
- A solution that will be easily **used and maintained by finance,** not IT
- **No coding or technical model building**
- Business rules writing is purely driven by finance using finance parameters
- Reports are primarily created by finance users, not consultants, thereby reducing costs
- Role-based security/**secure solution**
- **Browser and Excel** experience for all users

The Migration to Epicor FP&A

Customers on active maintenance for Epicor Advanced Financial Reporting (AFR) and Epicor XL Connect are eligible for a new migration promotion that can help them transition to Epicor FP&A. A new special FP&A migration package is available with the following features:

- Financial statements like income statements, balance sheets, cash flow statements, and other ad hoc reports
- AR, AP data access
- Report and budget templates that are easy to duplicate and modify
- Web report wizard to create new reports from scratch quickly
- Drill-down capabilities within reports
- Budgeting and planning capabilities such as budget approval workflow, machine learning (ML)-powered budgets and forecasts, unlimited what-if analysis, rolling forecasts, spreading, commenting, version control, and more
- Consolidation capabilities
- BAQ support
- Ability to include 10 entities/companies
- Web and Excel user interfaces

Limited-Time Offer
Customers with Epicor Advanced Financial Reporting (AFR) or Epicor XL Connect who wish to migrate to Epicor FP&A SaaS will get the first 12 months of SaaS free, if contracted before July 30, 2024.*

Sign Up Today

Contact your Epicor Customer Account Manager to book a free demo session. Let our experts help you discover the advantages of Epicor FP&A.

*Contract must be signed for at least three years.