



 Ireland

 Financial software

Core Financial Systems is an Ireland-based provider of financial software and custom development services. With more than 25 years of experience, it supports organizations in the Financial sector using Infor SunSystems® and related tools, while also creating tailored solutions that extend these platforms. Its teams work closely with clients to improve financial operations through focused consulting, support, and development.

- **Cut manual work** by replacing Excel with automated SLA dashboards.
- **Gained real-time KPI visibility** with customer-facing dashboards.
- **Improved resolution times** with clearer ticket visibility and stronger agent accountability.

Case study

How Core Financial Systems Removed Manual Work And Gained Traceability After Replacing BMC With InvGate

Before switching to InvGate Service Management, Core Financial Systems used BMC Track-It! to handle Ticket Management. Over time, the platform became outdated and didn't provide essential capabilities for the team. The company reached a turning point when a strategic customer requested a portal with live performance visibility.

Challenge

Among the capabilities the previous system lacked, the team didn't have a customer portal, SLA tracking, or an easy way to review development requests. Evidence handling and ticket searches slowed daily work.

Reporting was also inefficient, with a full day spent each month fixing Excel data for customers. Additionally, duplicate tickets created even more noise, as replies often opened new cases.

Solution

Choosing InvGate Service Management allowed Core Financial Services to move to the cloud and launch a customer portal quickly. The team replicated its process, refined the catalog with custom fields, and went live within a few months with minimal consultancy.

✔ **Fast implementation and cloud access**

The project started in January and went live in early April, with only 8 hours of InvGate consultancy and a small internal team. Moving to the cloud allowed both agents and customers to log in securely from any location, including mobile.

✔ **Cleaner ticket handling and development tracking**

Daily work became easier: agents could paste screenshots directly into tickets, and custom fields helped track development-related items without extra spreadsheets.

✔ **Instant access to metrics**

Dashboards replaced the slow process of exporting data for auditors and customers, allowing them to review performance information on demand.

✔ **Better internal coordination and faster responses**

Customer satisfaction went up while response times decreased. Even consultants who avoided using a platform before now use it regularly thanks to clear assignments and alerts.

Discover a new way of managing your IT operations

Work smarter, not harder with InvGate solutions.



What's next

With the main setup complete for its Service Management operations, the team is moving on to explore how InvGate's workflow builder and AI features can automate more tasks and

support future growth. The goal is to automate more processes, reduce resolution times even further, and scale support efficiently as its client base grows.



“InvGate is easy to use and quick to implement, and that’s exactly what we needed.”

Olga Woods
Support Consultant at Core Financial Systems.

Global leaders trust InvGate

