

# Upgrade to construction software in 7 steps



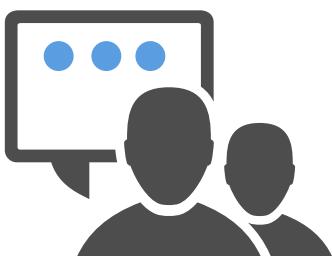
## STEP ONE **DEMONSTRATION**

Helping you find the right solution

As with any business investment, your first step to upgrading to a construction specific financial management system must start with an evaluation to find the solution right for you.

### 1. Tell us what you're looking for

In whichever format works for you, be it a call, email or meeting you can talk through the challenges you face, the improvements you'd like to see, and we'll explain how we can help.



### 2. We'll demo to your requirements

Next, we'll come and show you our Evolution M system and talk to you about how a construction specific financial system can consolidate your manual processes and provide both your financial and commercial teams' business intelligence beyond the numbers.



### 3. Your personalised upgrade proposal

From us you'll then receive a proposal summarising your challenges versus our proposed solution, and all the other benefits construction software can bring to your business as discussed during our demonstration.

**So you're first step is simple, tell us what you're looking for and we'll come and show you what we can offer and how we can make the process of upgrading your accounts system as straightforward as possible.**

**“**We felt that selecting a system designed specifically for use in the construction sector, supported by a team who understand the industry was of great benefit. **”**

Paul Oram  
Financial Controller  
Lee Warren Fabrications Ltd

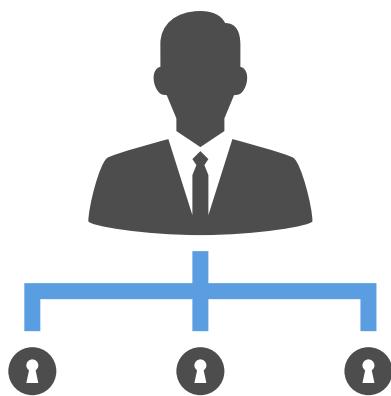
## STEP TWO PLANNING

Planning your upgrade to construction software

Once you've decided to go ahead and upgrade to our construction software, we get straight to work to finalise the finer details of your installation and schedule your training, including;

### 1. Meeting your key people

We will hold a planning meeting with the key members of your team to finalise your exact requirements and discuss the data you'd like to bring across from your existing system/s.



### 2. Scheduling training for your team

As part of our initial meeting we'll also introduce you to our specialised Upgrade Training Programme, and get training dates into diaries so everyone is happy with the timescales being set for the project.



### 3. Deciding when to 'Go Live'

It is likely that you will have a Go Live period in mind, perhaps a particular quarter, or at your Year End. If you don't we'll help to create one, if you do, we'll help sense check your go live expectation to avoid unnecessary disruption.

**Very quickly you will be able to visualise exactly how we will help your business upgrade to our construction software and understand who needs to be involved from your side.**

**“**I was impressed how quickly Integrity scheduled in our training, worked with us to decide a convenient Go Live date, and set us up with access to Evolution M.**”**

**Andy Bowles**  
Rose Builders Ltd

# STEP THREE

# SYSTEM CONFIGURATION

The setup & installation of your new system

The next step is for us to install your new system onto your office server and PC's.

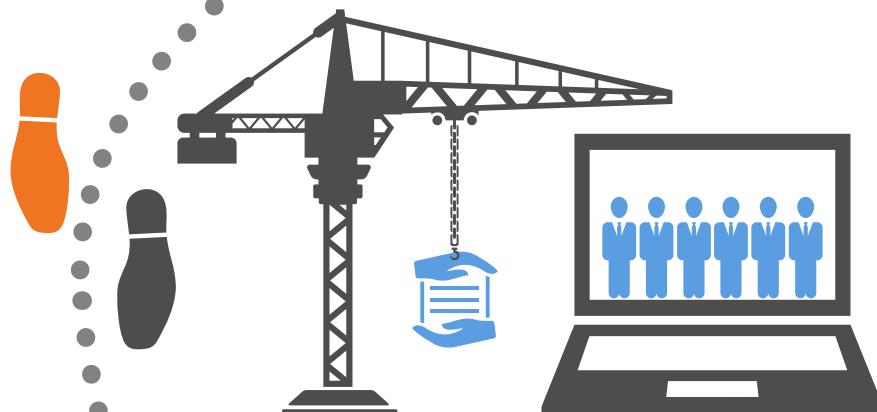
## 1. Installation of Evolution M

No need for you to worry about the hassle of installation, we simply come along and get your new Evolution M system setup on your office PC's and servers ready to begin training.



## 2. Creation of a 'Test company' with your data

Your new Evolution M system contains a 'Test' area, allowing you and your team to run through what has been learnt during training and get to know your new system without affecting data in the live system environment.



## 3. Bringing across your data

Because we can easily export data from your existing generic accounts system, you will be able to access your data in the new system very quickly.

**With your new system installed and populated with your data, you're now ready to begin the Upgrade Training Programme.**

**“**Having looked at other systems including Sage, I felt from the first demo of Evolution M the flexibility of the system was excellent and could be adapted to meet our business processes without us having to change.**”**

**Alison Smith**  
Accounts Manager  
Ancorite Ltd

## STEP FOUR

# TEAM PREPARATION

Once your new Evolution M system is installed, you're ready to start our Upgrade Training Programme, specially designed for businesses moving onto construction specific software for the first time.

### 1. Training that understands construction

Our consultants understand construction exceptionally well and our specially designed training programme is based around our experience of upgrading hundreds of businesses from generic onto our construction specific systems.



Training for  
your team

### 2. Professional user training notes

As part of our Training Programme, each user receives training booklets for each day of the training relevant to them, with space to add notes and of course refer back to throughout your upgrade process.



### 3. Reinforcing your skills

We appreciate that there can be a lot to take in when introducing a new financial system. Therefore to help users refresh what they've learnt, we have a number of tools to help reinforce what has been covered in the training notes such as online webinars.

**“**The Evolution M training notes are comprehensive and professional allowing you to add your own notes and refer back to once the trainer has left which has proved invaluable **”**

**Stephanie McFarlane**  
Mcgoff & Byrne Ltd

## STEP FIVE

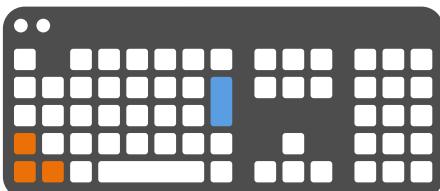
# TRAINING FOR USERS

Start your Upgrade Training Programme

Our Upgrade Training Programme has been designed for businesses upgrading to construction specific software, and follows the 5 main steps below.

### 1. Getting to know your new system

The Upgrade Training Programme starts with a run through of some of the standard functionality of your new Evolution M system to get you familiar with the software's Microsoft Office integration, menu navigation and keyboard shortcuts.



### An introduction to automated processes

As part of training users on how to create new and manage existing suppliers and subcontractors, users will also learn how to utilise the automatic online verification of new subcontractors and handling of CIS submissions.



### Utilising built in Document Management

Users are also quickly introduced to the Evolution M built in Document Management system, allowing you to easily attach documents produced by the system such as invoices, purchase orders and remittances, to the relevant contract or transaction within the system. External files such as CAD drawings, emails and photos can also be stored.

### 2. Day to day accounts processing

The next stage of the Training Programme focusses on getting your team familiar and comfortable with day to day processing within the system and being able to quickly create essential reports and lists using the systems' advanced 1-click integration with Microsoft Excel and Word.

From raising invoices and making payments by BACS, Remittances, Cheques and Direct Debits, to issuing credit notes - the Upgrade Training Programme takes users through essential day to day processes within Evolution M.

If using Payroll, users will be trained on how to prepare employee data and process payroll within Evolution M.

**“** After our initial training we felt very confident with the system, and our users reported back that the processes within Evolution M were straightforward and removed much of the manual entry and duplication of effort required – the system's integration with Excel proved a big hit! **”**

**Sarah Hughes**  
Lacy Roofing Co. Ltd

### 3. Contract management and job costing

We'll show your team how to set up new and maintain their existing contracts, utilising the flexibility of information which can be stored. Working with you, we'll then determine how you want contract costs to be analysed and monitored, by using cost heads and budgets in Evolution M.

Your team will learn how to quickly access and drill down into cost information on contracts, including being able to confidently run familiar Profit & Loss Reports.



### 4. Report writer training

To unveil the business intelligence behind the numbers within your new accounts system, users will be trained on the four levels of reporting.

#### 1-Click Export to Excel & Word

Firstly, all enquiry screens within Evolution M can be arranged as required and exported to Excel or Word, pre-formatted, in just one click.



#### Standard Report Templates

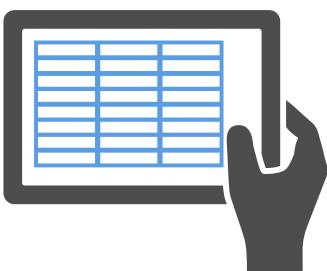
Secondly, templates can be filtered for running your day to day reports, available to then print or email.

#### Built in Report Writer

Evolution M also contains a built in report writer which can create the more complex, bespoke management reports you require, and export them into Excel.

#### Excel Automation Reporting Tool

The final level of reporting, if required, is an advanced reporting tool which effectively populates a sophisticated Excel spread sheet with live data from Evolution M. This is a Directors' dream as live data can be used to analyse any piece of information from virtually any perspective.



### 5. The CVR process - Integrating your commercial team

There are two key stages to successfully implementing the CVR module into your business.

Firstly, we work with your team to replicate the way you capture onsite adjustments, and understand your current authorisation processes.

Secondly, we help you to gain buy in from your commercial team to make the integration a success



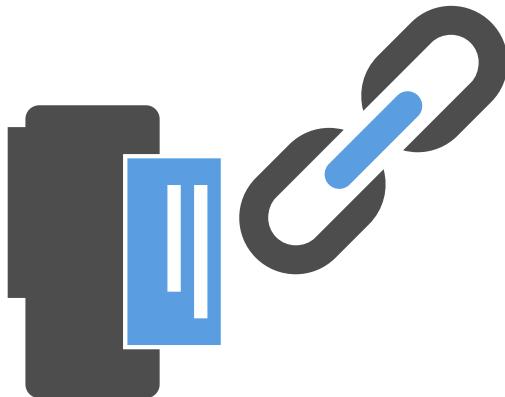
# STEP SIX

# GO LIVE SUPPORT

Going live on  
your new system

## 1. Go Live Linked to Payroll

Most customers link their Go Live into a weekly or monthly Payroll run. The exact date will depend on the frequency of your Payroll, however the sole objective when deciding on a Go Live date is to keep disruption to a minimum which we will help you decide on at an early stage.



## 2. Go Live Hand Holding Day

You are not left to your own devices on Go Live day – far from it. We are there onsite for a Payroll Go Live Hand Holding day to make sure a) everything works as it should do and your employees gets paid, and b) users are comfortable once live transactions start entering the system.



**“** It provided us with great peace of mind having Integrity on site at the point of Go Live. We expected a frantic day but everything went through smoothly and the few niggles you'd expect were ironed out immediately. **”**

**Fabiana Maschio**  
Sunbeam Group

# STEP SEVEN HANDOVER TO SUPPORT

Handover to  
your Support Team

## 1. Final Q&A opportunities

We spend time with each user in your team to answer any last minute queries and see how the system has settled in now that your transactions, data and documents are flowing through Evolution M.



## 2. Handover to the Support Team

Once training is complete, we will then hand you over to our Lincoln Support Team to manage your support calls and software updates going forward.



## 3. A team that understands construction

One of the many benefits of using construction specific software is that the team behind it understand how the construction industry works. Therefore when you have a query you can quickly talk to a member of our Support team who talks your language.