

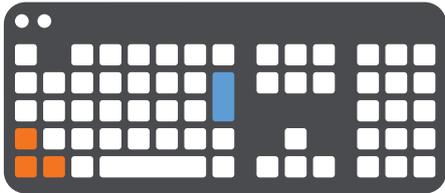
STEP FIVE TRAINING FOR USERS

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.



2. Day to day accounts processing

The next stage of the Upgrade 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 and RTI submissions within Evolution M.

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 fully integrated 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.

“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

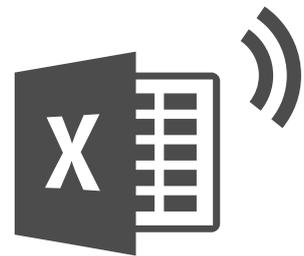
Secondly, templates can be filtered for running your day to day reports, available to then print or email.

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.

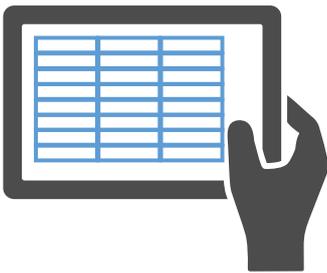
Excel Automation Reporting Tool

The final level of reporting, if required, is an advanced reporting tool which effectively populates a sophisticated Excel spreadsheet with live data from Evolution M via our XLA add ins. This is a Directors' dream as live data can be used to analyse any piece of information from virtually any perspective without the need of running multiple reports.



“ Once we started working through the contract enquiry screens, drilling down into cost information and exporting data into Excel, we quickly saw how a couple of days could be saved reporting each month compared to our previous system. ”

Grace Armstrong
R W Armstrong & Sons Ltd



5. The CVR process - Integrating your commercial team

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

The CVR module enables you to record cost and value adjustments by contract by period, that can be retrospectively viewed at a later date. This can also include Subcontractor and Supplier values that enable your Quantity Surveyor or Contract Manager to record their adjustment values in an Excel Environment, all of which is stored against the contract in the Evolution M system. Once your adjustments are finalised all CVR's can be report upon giving the financial team visibility with the option to journal in any adjustments into the system if needed.

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.

Call us **0845 224 0164** or visit **www.integrity-software.net**