

Advanced

Business Cloud Essentials Welcome pack

Welcome to Advanced

Dear customer,

Thank you for choosing Advanced and Business Cloud Essentials. As CEO of Advanced, I have pleasure in welcoming you to the start of a successful working relationship with us.

At Advanced, we focus on three core areas to ensure maximum business success for our customers:

Deliver more on time – Stick to your promises by getting your product in the hands of your customer when they need it

Worry less about finances – Know where your money is and what is coming down the line

Spend less time firefighting – Remove the admin blockers and let your staff make a difference

Our mission is to enable UK manufacturers to make a difference by removing the challenges that stop them from focusing on delivering to customers and achieving their goals as a business.

Importantly, our scale and capability means that we are committed to continued substantial investment in our own software solutions and associated services. We also partner with trusted brands in the technology marketplace, integrating their market-leading solutions into our business platforms to deliver greater value for our customers.

I hope you find our capabilities compelling and I look forward to working alongside you as you continue to make a difference to your customers, employees and community

Best Wishes,

A handwritten signature in blue ink, appearing to read 'G. Wilson'.

Gordon Wilson
CEO, Advanced





Let's get you started

Welcome to the Business Cloud Essentials family! Your Customer Success Manager (CSM) will be setting up an introductory call with you so you can tell us about your team, how Business Cloud Essentials will fit into and adapt your existing processes and business systems, and we will walk you through what you can expect during Implementation and next steps.

Before your call, please take the time to read and review the information within this welcome pack and if you have any queries your dedicated CSM can answer those for you.

Business Cloud Essentials Overview

Business Cloud Essentials is our business management solution designed to stop production and delivery delays, costly waste of materials and resources, eliminate product quality issues, financial stress and all of the blockers stopping you from making a difference.

It covers all the essentials you need: CRM, Finance, Sales, Purchase, Stock, Production, Delivery, People Management and Payroll. We help you get live, run your solution 24/7/365 and are always available to help for a simple monthly price.

Features and functionality

- > **Multi-currency**
 - Compliant, multi-currency accounting system allows for buying and selling in over 160 currencies worldwide
- > **Unified Ledger Accounting**
 - A hierarchical accounts structure ensures that the system is easy to use and understand and a range of transaction templates help to eradicate 'mispostings' and accounting errors. erarchical accounts structure ensures that the system is easy to use and understand and a range of transaction templates help to eradicate 'mispostings' and accounting errors.
- > **Tax calculation and submissions –**
 - VAT and PAYE can be reported and submitted to HMRC through our secure platform
- > **Sales & supply chain management**

Quotes, tenders, orders and invoices are easily managed and users can benefit from an insight into all customer and supplier behaviour and performance.
- > **Price lists & discounts**
 - Manage fixed and flexible pricing for individual customers or groups of customers.
- > **Customisable reporting**
 - In addition to a wide range of prebuilt interactive graphical and tabular reports, users can choose to customise reports to suit their individual reporting needs.
- > **Financial forecasting**
 - The system is able to estimate future performance based on sales forecasts, or even from calculating against past performance.
- > **Payroll**

Cloud Essentials is a fully recognised and verified payroll submitter under HMRC's Real Time. Information (RTI) scheme and allows unlimited payroll submissions.
- > **Production planning**
 - Works orders and events are used to manage tasks and workload on an ongoing basis. Users can schedule works orders into the system and receive instant feedback on its progress.
- > **Bills of Materials (BoM)**
 - Unlimited depth Bills of Materials allow users to create complex product configurations and stock interdependencies.





Features and functionality

- > **Production scheduling**
 - Users are able to schedule works orders automatically, or through an interactive scheduling timeline.
- > **Material Requirements Planning (MRP)**
 - BCE allows for automatic calculation of stock requirements against future orders and can raise internal works orders or external purchase orders to ensure that stock is available to meet demands.
- > **Customer Relationship Management (CRM)**
 - The CRM system allows users to create, track and convert enquiries into quotes and orders and measure performance on an ongoing basis
- > **Serial numbering & batch traceability**
 - A full serial numbering and batch traceability system allows users to track individual products, components or sub-assemblies through the system.
- > **Warranties, service & repairs**
 - Manage the repair of client inventory items, or the management of a service team. Track warranties & record all repairs and interactions with the client.
- > **Quality management**
 - Quality assurance can be tracked, monitored and reported in the system. Non-conformances can be entered and updated in the system for prevention and continuous improvement
- > **Multiple access levels**
 - The system allows for multiple levels of access, from data entry users / operators to full system access. This ensures data confidentiality and allows sensitive data to be restricted.
- > **Projects & departments**
 - Clients with multiple sites, departments or project based businesses are able to report on performance independently without the need for complex accounting calculations and estimations.
- > **Dashboard KPI reporting**
 - Full management reporting on customers, suppliers, CRM, Operations, Employees and Accounts.

Your Journey to Go Live

We want your journey to go live to be as seamless and straightforward as possible, whilst still remaining in depth and delivered to you at a first-class standard to ensure you have ticked all the boxes and are ready to implement smoothly. Your CSM will take you through the process on your first call with them, but below is a snapshot of what you can expect:

- > Review landing page and all content within the welcome pack
- > Tell us who your project team are and provide details
- > Review checklist of actions
- > Review your test/demo environment
- > First checkpoint call with CSM
- > Receive template project plan from CSM
- > Link to how to videos per function
- > Review functional requirements and responsibilities guide
- > Second checkpoint call with CSM
- > Begin Consultancy Media Sequences
- > Configuration & Assembly Media Sequences
- > Progress Checkpoint with CSM
- > UAT & Live System Build
- > Progress Checkpoint with CSM
- > Go Live Media Sessions
- > Go Live Checkpoint with CSM and Support
- > Go Live!

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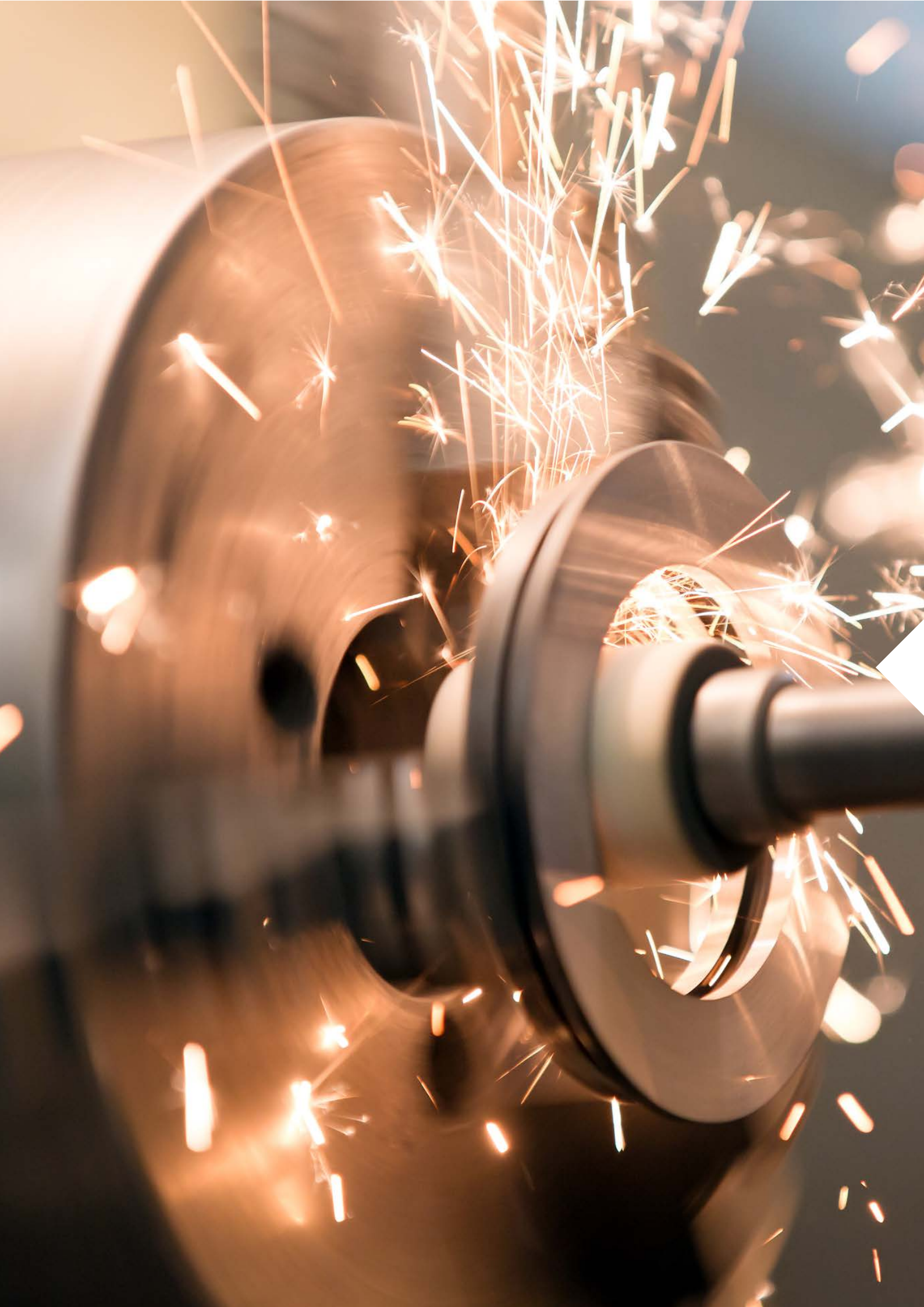
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Go Live and Beyond

The Advanced Family

Being an Advanced customer means you get access to a range of services and benefits from us to make your experience as a customer truly first-class. We're with you every step of the way:

Dedicated Customer Success Management

As an Advanced customer your Customer Success Manager (CSM) will be responsible for ensuring you get the maximum value from Business Cloud Essentials. They are there for anything related to Advanced and will be on hand to deliver insights which will drive your productivity and success over the coming months and years. The CSM will work closely with your project team and you to gain a deep understanding of your business and guarantee you achieve value from the solution as soon as possible

It's important to us that we gain insight and understanding how our customers use our services. Our product management team also work closely with our customers, ensuring your feedback is at the heart of future developments and updates. We will engage with you through training webinars, customer advisory boards and regular site visits to make sure your voice is heard.

Product Updates

We build out an annual roadmap based on customer feedback and market trends to ensure the product is continuously enhanced and moved forward with you.

Business Cloud Essentials is a Cloud-based solution, meaning all updates are included within your monthly subscription fee and are automatically added into the system without having to reinstall anything manually. All new product announcements are announced within the product itself alongside any training or supporting documentation, meaning you won't miss anything.

Support

We have a dedicated UK based support team providing support from 09:00-17:30pm every day of the year excluding bank holidays. All support cases can be logged using our dedicated support portal and then will be picked up by a member of our team. If you feel this level of support isn't sufficient there are options to upgrade to higher support tiers in order to increase the hours in which you receive onsite support from us.

Customer Events

Our annual customer conference, Advanced World, provides an opportunity for you to meet key Advanced stakeholders across account management, support, product management and senior Advanced staff. The event sees us bring together customers from across the Advanced community to share ideas and debate the big issues to help keep their organisations one step ahead in their industry sector. The event also provides the opportunity to look at examples of how we are innovating to meet our customers' varied requirements, and offer a chance to preview some of the new developments and services coming to market in the following financial year.



More information

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Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy