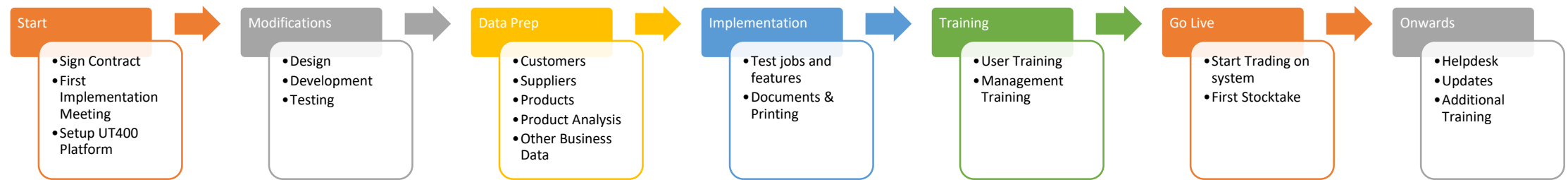


# UT400 System Implementation

Overview to the implementation project for a  
UT400 trading and stock control system

# Project Overview



## Note:

This overview has estimated time required for each stage of the project. This is a guide only and will be influenced by the time that can be made available around the normal running of the business for the implementation project.

# Start – 1 week

Area	What we do	What you do
Paperwork	<ul style="list-style-type: none"><li>• We prepare the contract and send you copies for signing</li><li>• We raise an invoice for deposit on implementation project</li><li>• We raise an invoice for first month UT400 implementation subscription (Prime Admin User + additional users if requested (50% normal subscription))</li></ul>	<ul style="list-style-type: none"><li>• You check and sign contract</li><li>• You pay deposit invoice</li></ul>
Initial Implementation Meeting	<ul style="list-style-type: none"><li>• We arrange first implementation meeting</li><li>• Attending – Ten-25 sales person, Ten-25 project manager</li></ul>	<ul style="list-style-type: none"><li>• Attend first implementation meeting<ul style="list-style-type: none"><li>• Location – can be online, at your offices or Ten-25 offices</li><li>• Duration – typically around 3 hours</li><li>• Purpose – understand your requirements from the system, agree project team, review take on data, outline timings for remainder of project, including target go-live date</li><li>• Attending – Commercial main contact (person who knows what the business wants) technical main contact (person who will administer the system from your business)</li></ul></li></ul>
Setup UT400 Platform	<ul style="list-style-type: none"><li>• We setup a node (like an online server) with your version of UT400 on for your business</li><li>• We add 2 implementation users<ul style="list-style-type: none"><li>• 1 x Ten-25 Administrator (no charge to you)</li><li>• 1 x Your business System Administrator</li><li>• More users can be setup at this time but there implementation subscription (50% of full subscription) starts at that time</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Nothing at this stage</li></ul>

# Custom Modifications

Area	What we do	What you do
Overview	<ul style="list-style-type: none"><li>• We like to think with 40+ years supplying systems that UT400 will cover the majority of your requirements by standard. We do still come up with specific feature requests that need custom modification to make the system fit your business</li><li>• All developments go into the core UT400 platform and will be available to other users as updates. This keeps you running a package system that can be easily updated, rather than a bespoke application.</li></ul>	<ul style="list-style-type: none"><li>• Duration of development – There is no set time period for a development, but we try to get them working for your implementation stage to tie in with your testing of the system</li></ul>
Design	<ul style="list-style-type: none"><li>• We work with you to define the commercial specification of the modification – how users will use the feature and the commercial benefits of working that way</li><li>• We use the commercial specification to write a technical specification – how the developers will code the new features</li></ul>	<ul style="list-style-type: none"><li>• You work with your Ten-25 project Manager on the commercial requirements and screen designs of the modification</li></ul>
Development & Testing	<ul style="list-style-type: none"><li>• Our development team will add the new/ revised features into the UT400 platform</li><li>• Our support team will do testing on the new features, this is called Alpha testing</li></ul>	<ul style="list-style-type: none"><li>• When we issue the new features to your system you can test them with your data. This is called Beta testing</li><li>• When you are happy with the new features they are signed off and this is called Gold (Production ready)</li></ul>

# Data Preparation

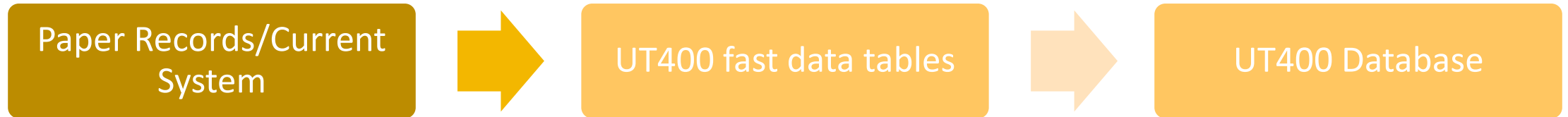
Preferred option – using spreadsheets to review records



Option if you only have paper records



Option if using paper records, or current system cannot export data to a spreadsheet



Option for current Ten-25 customers



# Data Preparation – 2-6 weeks

Area	What we do	What you do
<b>Overview</b>	<ul style="list-style-type: none"> <li>We offer advice on the best way to work on the data prior to it being imported into your new system</li> <li>We can review the data in your spreadsheets prior to import, and advise on changes/improvements</li> </ul>	<ul style="list-style-type: none"> <li>Most businesses use the change of system as an excellent opportunity to tidy up their records, removing old data and reviewing naming and coding conventions</li> <li>This step is often the longest and most time consuming of the implementation, however the work pays big dividends in the value of the system once it is live</li> </ul>
<b>Customers/Suppliers/Other data</b>	<ul style="list-style-type: none"> <li>We can advise on Customer/Supplier codes</li> <li>We can advise on the setup of other business data, such as Users, Reps, Business Types, etc.</li> <li>Other Business Data can be imported from a spreadsheet, but it is often quicker to enter the data directly into UT400</li> </ul>	<ul style="list-style-type: none"> <li>You will work on customer/supplier lists from your current system</li> <li>This can be from your trading system or financials system</li> <li>If you are keeping the financials system in place the customer and supplier codes must match between UT400 and the financials system</li> <li>If you are taking on a new financials system the customer and supplier codes can be setup in UT400 and will be automatically setup in the financials system</li> </ul>
<b>Products/Product Analysis</b>	<ul style="list-style-type: none"> <li>We will advise on Product records</li> <li>The same products may be held in different ways in UT400, for example where each length of an item is a separate product at the moment, they can be a single length controlled product in UT400</li> </ul>	<ul style="list-style-type: none"> <li>You will work on product list(s) from your current system</li> <li>Consider product coding structure to help searching for items and the sequence of lists</li> <li>Automatic pricing will be setup on UT400 directly, but consider the 'Base Price' for each product. This is typically the retail price for a product, which can be discounted, but can be the best price from which higher selling prices are calculated</li> <li>Consider your product analysis structure, Category &gt; Group &gt; Sub-Group &gt; Product. This hierarchy gives useful analysis and fast pricing setup</li> </ul>

# Implementation – 2-3 weeks

Area	What we do	What you do
Overview	<ul style="list-style-type: none"><li>We help with configuring the system to the needs of the business</li></ul>	<ul style="list-style-type: none"><li>This is your opportunity to run through the system with your data on and confirm it provides the operations, analysis and output documents that the business needs</li></ul>
Business Operations & Analysis	<ul style="list-style-type: none"><li>We work with you on the operations of the business (buying, selling, stock control, etc.) and confirm the screens are providing the correct information to the different users</li></ul>	<ul style="list-style-type: none"><li>You will run through test processes on the system, like sample sales orders, stock adjustments, etc.</li><li>You will check the analysis that the system will provide on sales, purchasing, customers, suppliers and stock</li><li>You can provide details of any alerts that need configuring<ul style="list-style-type: none"><li>Business alerts – items that might be an issue (i.e. customer going over credit limit)</li><li>Automated reports – regular reports that are emailed to users/customers/suppliers</li></ul></li></ul>
Output Documents	<ul style="list-style-type: none"><li>We will provide template documents with your logo and address details<ul style="list-style-type: none"><li>Quotation</li><li>Works Order/Picking Note/Mill Order</li><li>Dispatch Note</li><li>Invoice/Cash Sale Invoice/Credit Note</li><li>Purchase Order</li></ul></li><li>We will setup cloud printing on your current and any new printers</li><li>We will advise on the setup of document output (print/email)</li></ul>	<ul style="list-style-type: none"><li>You will check the template documents</li><li>You will advise of any custom layout changes needed</li><li>You will advise of any custom document types required</li><li>You will setup which documents are output (print/email) as orders are processed</li></ul>

# Training – 3-4 weeks

Area	What we do	What you do
<h2>Overview</h2>	<ul style="list-style-type: none"> <li>• Provide training to the key users within the business</li> <li>• We typically 'train the trainers' on each of the system areas but we can train all the end users by special arrangement</li> </ul>	<ul style="list-style-type: none"> <li>• Identify the key people to be trained in the different areas of the business</li> <li>• "How much training do we get?" – we will work on a training plan at the implementation meeting, but everyone learns at different rates and we will provide top up training until everyone is confident using the system</li> <li>• Location – training will be a mix of on-site days and shorter online sessions. If you don't have room on-site we can look to booking a local meeting room (at cost) or you are welcome at the Ten-25 offices in Bournemouth, Prestwick or Guildford</li> </ul>
<h2>Management Training</h2>	<ul style="list-style-type: none"> <li>• We provide training for managers that are a mix of operational processes ("how do I do this") and discussion on good practice</li> </ul>	<ul style="list-style-type: none"> <li>• Managers will need to be available for training sessions that can be 1-3 hours long depending on the topic</li> <li>• It is worth allocating additional time after the training for people to try out the things they have learnt</li> </ul>
<h2>User Training</h2>	<ul style="list-style-type: none"> <li>• We will train operational users on the use of the system. This can be either training a trainer, who can update others, or with classroom style for larger groups.</li> <li>• We will provide YouTube videos on the use of key operations within the system</li> </ul>	<ul style="list-style-type: none"> <li>• Users will need to be available for training sessions that can be 1-2 hours long depending on the topic</li> <li>• It is worth allocating additional time after the training for people to try out the things they have learnt</li> <li>• UT400 has in-system guidance using step throughs, to help users with new operations</li> </ul>



# Go Live

Area	What we do	What you do
<b>Go Live – Sales &amp; Purchase Order Processing</b>	<ul style="list-style-type: none"><li>• At the close of business the day before Go Live we will ensure there is a clean version of your database which is ready for live trading</li><li>• Your Project Manager will be booked to you for the day you are going live to answer any questions that come up</li><li>• The Ten-25 helpdesk will be available from Go Live day, and will be aware that you are starting trading that day</li></ul>	<ul style="list-style-type: none"><li>• Ensure all staff are aware that the new system is live from today, and any information entered on the system is valid and kept up to date</li><li>• If you are going live on a Trade Counter it can be worth making customers aware that you are running on a new system, and that your staff will be as quick as possible in helping them, but their patience is appreciated. A bowl of sweets can sometimes take the edge off people's impatience</li><li>• Any queries that arise can be put to your Project Manager, or logged with the helpdesk.</li></ul>
<b>Go Live – Stock Control</b>	<ul style="list-style-type: none"><li>• We will clear down your stock records ready for the first Stocktake to be entered</li><li>• We will ensure users are trained on doing a stocktake, whether that is paper or system based</li></ul>	<ul style="list-style-type: none"><li>• You can go live the same time as Sales &amp; Purchase Order Processing, though we often recommend going live on stock a few weeks after the Order Processing Go Live. This is due to the higher chance of keeping stock accurate, once the users are familiar with the system and selecting the correct products on orders.</li><li>• When you are ready to go live on stock you will need to do a stocktake on any products that will be stock controlled. This will give you your opening stock.</li></ul>

# Onwards

## Area

## What we do

## What you do

### Helpdesk

- We provide helpdesk support from 07:45 to 18:30 Monday to Friday
- We also provide emergency cover Saturday 09:00 to 16:00
- We can also provide cover on Sundays and Public holidays by special arrangement
- We guarantee to respond to all calls (support tickets) within **1 hour** of them being logged. A response is a call/email to discuss the issue, not an auto-response with a ticket number
- We target (and achieve) closing 95% of all calls logged within **1 business day** of them being logged

- If you have issues with the system, or would like some help with something a call can be logged with the helpdesk.
- Calls can be logged by phone 01202 893693 or email [support@ten-25.co.uk](mailto:support@ten-25.co.uk)

### Additional Services

- You will be allocated a Ten-25 Account Manager (usually your Project Manager)
- Your Account Manager will be in regular contact to ensure the system is performing well, and discuss potential enhanced use in the future
- We can provide on-site training, consultancy, system review and improvement at £750 per day including expenses
- We can develop custom modifications for you

- Over the years as you use the system, the business will evolve and we can work together to ensure the system is being used effectively and delivering the best information and greatest time savings

# Meet the Services Team



## **George Ritchie**

**Role:** Services Manager  
**Years with Ten-25:** 18

**Skills:** Over 30 years experience working in Business Systems, Knowledge and understanding of Timber Industry; More skilful in the kitchen than on the golf course, long suffering Ayr United supporter

18 years experience in Timber Importers and Merchant

## **Chaz Davenport**

**Role:** Support Analyst  
**Years with Ten-25:** 21

**Skills:** System Infrastructure & Networking; Cloud Platforms; customer support.

The part of the job I enjoy most is getting to understand how you operate and communicate, to give you the best help and advice we can offer. Outside of the IT melee, I am a Dad first, an actor, performer and occasional director second, with a deep love of all things Shakespeare, performing regularly on Brownsea Island.



## **Mark Gerrard**

**Role:** Support Analyst  
**Years with Ten-25:** 13

**Skills:** Crystal Reports, System Automation & Support; Terrible at football despite plenty of practice.

## **Gerry Scott**

**Role:** Support Analyst  
**Years with Ten-25:** 4

**Skills:** Problem Solving & Analysis, Administration, Customer Service; New father to my lovely daughter, and currently training for NABBA (Bodybuilding)

