# THE FIVE PHASES
OF TRAINING

for FOUNDATION® Construction Accounting Software
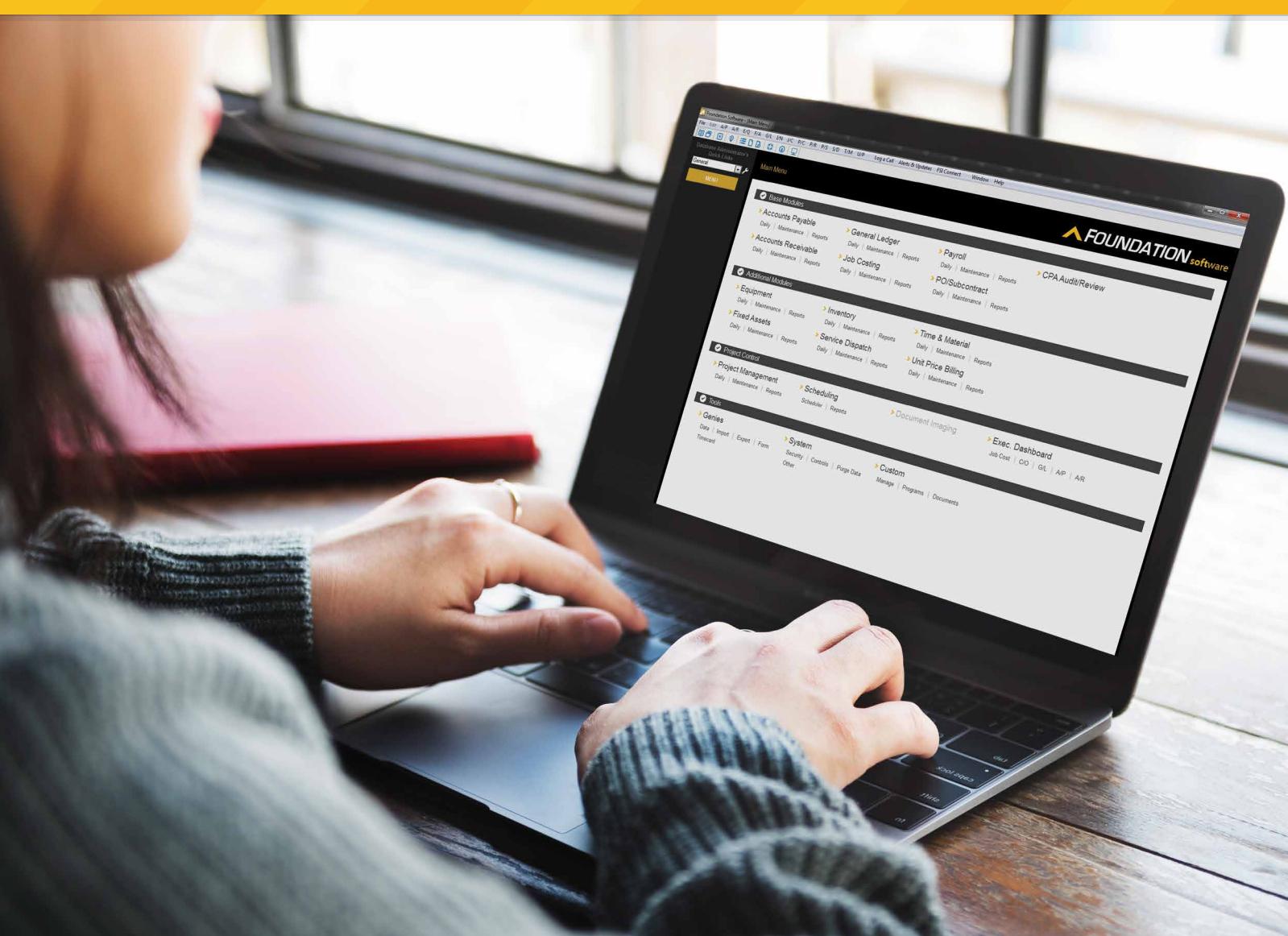
Why five phases?

As most contractors will tell you, in order to build something that will last, you have to take your time with the details. Implementing FOUNDATION is no different. We're invested in your success, and we've found that the more attention we give together to your building a database and learning the system, the more likely you'll enjoy that success for years to come.

We want to make sure your system is set up with your preferences and your business needs in mind. So we've designed our training program to allow you to customize the building blocks of your system over 8-16 weeks, with a dedicated trainer to guide you through the whole process.

PHASE 1
Planning

Following installation, we schedule a planning session for you to meet your trainer and for your trainer to meet your business. Your trainer will also take you through an overview of FOUNDATION's structure and the learning process. To help you set up the options that work best for you, the first phase will focus on:

✓ Understanding how your company operates and what it needs

✓ Defining each user's role in the software

✓ What to expect from the implementation process

PHASE 2
Maintenance items & the accounting/project management framework

Next, your trainer will help you set up the maintenance items that form the basis for your future transactions and help you route those transactions to your G/L so you can see how you will be able to view your data.

Your maintenance items are essentially the building blocks of FOUNDATION. Setting them up is one of the most important components of your new system. The basic process looks like this:

Build Maintenance Items	Create Daily Transactions	View Information
Employees Vendors Customers	Timecards Invoices Billings	Job costing Aging History reports

E.G.
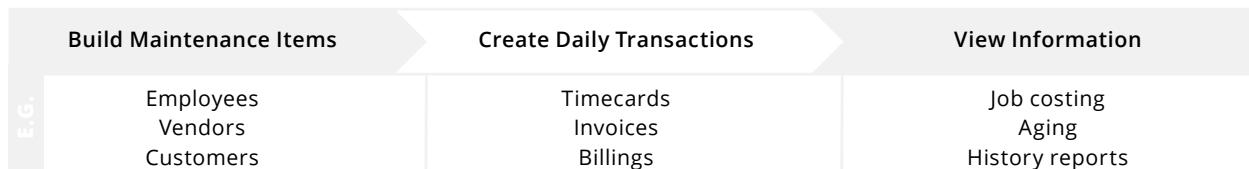
Items that your trainer will work with you on include:

General Ledger	Building G/L accounts and showing you how they affect job costing
Job Costing	Defining a job cost structure, helping you understand options for measuring costs and organizing data
Payroll	Defining your employees; determining taxes, burdens, deductions, prevailing wage and fringes; and deciding which reports you need
Accounts Payable	Defining vendors, invoice terms, sales taxes and 1099 fields
Accounts Receivable	Defining customers, invoice terms and income types and determining billing formats, such as AIAs, time and material, service, and unit price
Project Control	Creating custom document templates for RFIs, submittals, change orders and more; customizing categories for document image lookup; and creating correspondence categories and contacts
Additional Modules	Setting up equipment and inventory items; customizing dispatch boards; and prioritizing your setup and training based on features important to your business

PHASE 3
Practice & test daily transactions

You'll learn the daily functions of the software and have guided experience in a practice database, including the process and flow of entering timecards, invoices, billings, change orders and project documents; receiving and making payments; and other daily items you'll need to run your business.

Practicing these functions — especially on your own — will help to make your transition easier by increasing your familiarity with the system. It will also allow you and your trainer to test your system setup, view reports and see your database in action.
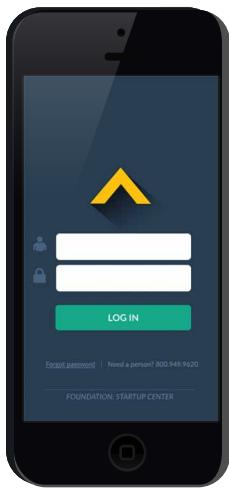
PHASE 4
Going live

By this point you'll be ready and feeling confident to take your system "live." In FOUNDATION, "going live" is divided into two parts:

Using FOUNDATION for your real transactions	Your trainer will help you post your first payroll and enter billings and invoices as of your live date. Once something is posted to the G/L on or after your "live date," you're live.
Tying out your history	Your trainer will help you to tie out your old accounting system into FOUNDATION and create a smooth and accurate transition for every module.

PHASE 5
Settle in & review

Once you're live in FOUNDATION, your trainer's final task is to help you settle into the day-to-day and ensure you understand the system. During this phase, training time is mostly self-guided. You'll be encouraged to ask questions about anything that arose since going live and discuss ideas and processes that may make the software easier to use.

You'll also learn more about reporting structures and reconciling accounts, as well as covering issues that may have been missed or need to be reviewed.

WRAP-UP MEETING

The last session will be similar to your planning meeting — we want to check in! Recognizing that your business is unique, we'll do a final review of your setup and experience to make extra sure we've set you on the best path to success as you define it.

We'll also get you ready to begin using our support department, which will be ready to help you troubleshoot your transactions, maintenance and reports and continue to build up your understanding of the system as needed. Once you graduate from training, you'll always have us just a phone call away!
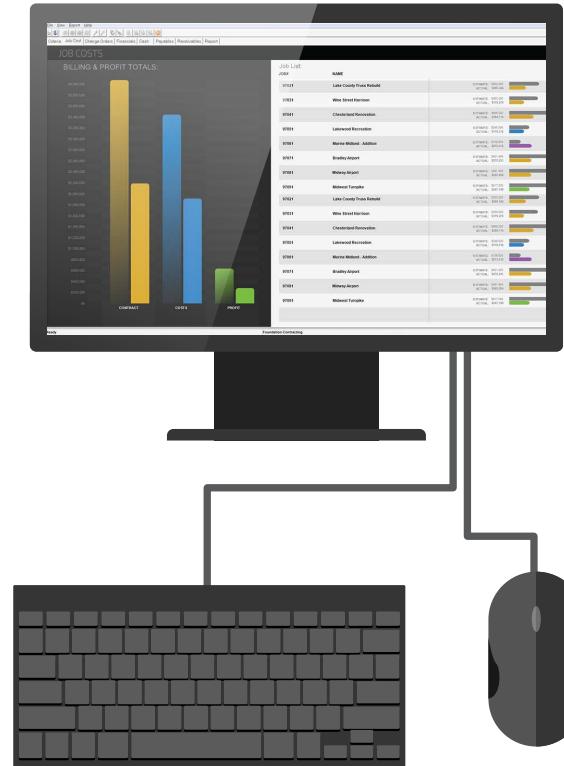
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