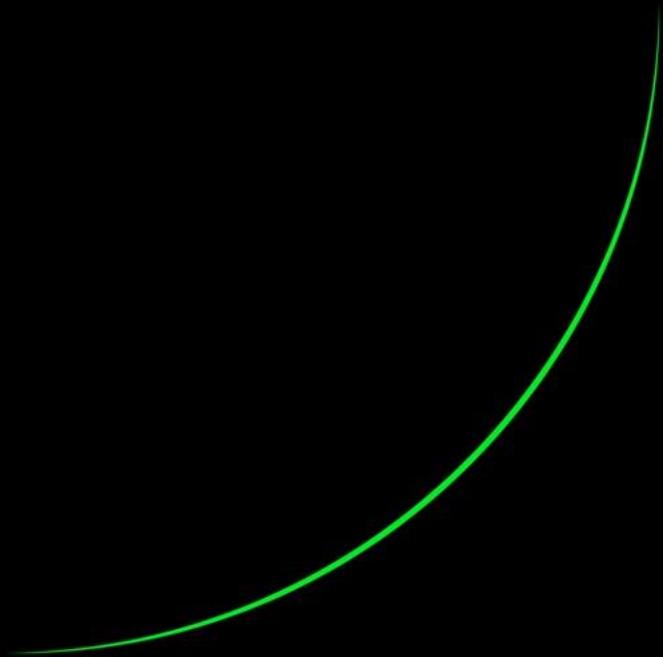


A C U I T Y 2 4

Sage Business Partner

# 24 Day Onboarding

What to expect – week by week



# Introduction

Welcome to your guide to the Sage Essentials Acuity24 onboarding, this will take place over a 24-day period from start to finish.

The onboarding will be executed between a mixture of 1-2-1 consultancy & group sessions delivered in cohorts.

You'll on board into a predefined kick off session along with other clients going through the same process on 'Day 1' of your implementation.

You'll then be allocated a consultant who will work with you on the Data Migration and Implementation of your solution. This part of the process will be handled in a 1-2-1 environment. Interactions with your consultant will be delivered remotely, via MS Teams.





All other areas of delivery, including training, testing and the go live on your system will be delivered in groups (a cohort). These sessions are accessible via GoToWebinar.

Should throughout the process you be unable to keep to the 24-day schedule, please don't worry. You can drop to the next cohort at any time to ensure your Go Live process.

This animation will run through the steps you will take over the next 5 weeks prior to live transacting in your sixth week. It will also highlight the resources needed for each week and where to find them.

For any questions you may have please see the FAQ section or reach out to your Sage Account Executive for assistance, or you can ask the cohort lead consultant should the question arise during the project.

# Terminology

You'll see tables throughout this document. The table below gives context to some of the wording found in these tables.

Term	Meaning
DEADLINE	This relates to a deadline that must be met by customers to ensure we're able to continue the project.
CUSTOMER ONLY	This refers to an activity that is expected to be completed by the customer, without any interaction with Acuity24.
ACUITY24 ONLY	This refers to an activity that will be completed by Acuity24.
(Non-Sage 50 Only)	Refers to customers migrating from solutions other than Sage 50.
(Sage 50 Only)	Refers to customers who are migrating from Sage 50.
COHORT	Refers to group sessions.
1-2-1	Refers to interactions with a dedicated consultant.

# Week 1 – Onboarding, Data Extraction/Backup Provided

# Week 1

Your first week of the programme is all about setting you up for success.

The early part of the week will include dedicated sessions to welcome you on to the programme, how to access your system, how to interact with the Acuity24 Service Team and useful content that will help to educate and guide you through the process.

The main activity for week 1 is to enable you to provide your Sage 50 data via backup or for non-Sage 50 clients enable you to extract your existing data into import files for it be loaded into your new system.

"You will find the information of how to activate your Sage Intacct system in the "Activation and Access document" this will confirm your installation and grant Acuity24 access to start the build of your solution"

# Week 1

Day(s)	Detail
1	COHORT - Project kick-off, data migration processes, system admin training, accessing your system, providing Acuity24 access to your system, how to log tickets with our team.
2	CUSTOMER ONLY – Prepare data backups (Sage 50 only), begin populating data files for loading (Non-Sage 50 only).
3	1-2-1 catch up with your allocated consultant.  DEADLINE – data backups submitted to Acuity24 for migration.
4	CUSTOMER ONLY – Continue populating data files for loading (Non-Sage 50 only).  Acuity24 – Begin migration process for Sage 50 clients.
5	1-2-1 catch up with your allocated consultant.  DEADLINE – Submission of data files for migration (Non-Sage 50 Only).

# Week 2 -Implementation

# Week 2

Week 2 of your implementation journey will be relatively quiet from your perspective. Acuity24 have received your data and we're busy loading and migrating this into your solution and configuring all necessary settings in the system.

You'll be expected to have ad-hoc discussions with your dedicated consultant throughout the week. These will be via email or MS teams meetings. The discussion points around these emails / meetings will specifically relate to data migration, where further information is needed or to be clarified so that Acuity24 can complete this part of the implementation.

# Week 2

Day(s)	Detail
6 - 9	Ad-hoc data migration/configuration queries.  ACUITY24 ONLY – Perform data migration and system configuration.
10	Ad-hoc data migration/configuration queries.  ACUITY24 ONLY – Completion of data migration and system configuration.

# Week 3 - Training

# Week 3

This is where you begin your training on the system.

Dedicated sessions will be provided on functional areas of the system.

These sessions will be delivered in cohorts (groups) where all customers undertaking this implementation methodology will undertake the same training methodology.

Where training sessions are arranged but are irrelevant to your usage of the system, you don't have to attend. For example – you have access to the project tracking module. If you're not going to use this module, attending the training isn't required.

All training sessions arranged that is included in 'your' system configuration is mandatory.

# Week 3

Day(s)	Detail
11	COHORT – Training Session 1 – General Ledger, Cash Management, Project Tracking
12	COHORT – Training Session 2 – Accounts Payable, Accounts Receivable
13	1-2-1 Catch Up
14	COHORT – Training Session 3 – Purchasing, Order Entry, Items
15	COHORT – Training Session 4 – Reporting & Dashboards.  COHORT – Preparing and completing 'Testing' of your solution.  1-2-1 Catch Up

# Week 4 – System & Process Testing

# Week 4

The fourth week will be entirely dedicated to testing your system and processes. Daily drop-in sessions will be arranged throughout the week.

Updates of each UAT issue logged within the Acuity24 Customer Portal will have status updates and resolutions provided against the options.

# Week 4

Day(s)	Detail
16	CUSTOMER ONLY – Log testing queries through Acuity24 support portal. COHORT – Common UAT Queries session.
17	CUSTOMER ONLY – Log testing queries through Acuity24 support portal. COHORT – Common UAT Queries session.
18	CUSTOMER ONLY – Log testing queries through Acuity24 support portal. COHORT – Common UAT Queries session. 1-2-1 Catch Up
19	CUSTOMER ONLY – Log testing queries through Acuity24 support portal. COHORT – Common UAT Queries session.
20	CUSTOMER ONLY – Log testing queries through Acuity24 support portal. COHORT – Common UAT Queries session. 1-2-1 Catch Up, Sign off testing phase via DocuSign.

Note – you will not be able to progress to a Go Live phase until you’ve signed off the testing phase.

# Week 5 – Go Live Preparation & Execution

# Week 5

The fifth week is dedicated to 'Go Live Planning & Execution'. This will involve purging transactions from your system that were being used for testing purposes, preparing your opening balance transactional data (Opening Trial Balance, Open AP & AR Transactions) so that they can be loaded into the system.

A final validation of your system is required prior to live running, this will include checking record numbers match between systems (does the total number of customers in Sage 50 and Sage Intacct match, subject to any data cleansing), the data values against records match between systems (do the values in the fields a customer record match between Sage 50 and Sage Intacct, addresses, contacts, credit limits, etc) and the opening transactions match (comparing the trial balance, aged debtor and creditors between Sage 50 and Sage Intacct).

# Week 5

Day(s)	Detail
21	<p>COHORT – Preparing for Go Live – Session.</p> <p>(Sage 50 only) – send updated backup for live migration.                      (Non-Sage 50) – send import files for new records created between initial system load and now and opening AP/AR transactions.</p>
22	<p>ACUITY24 ONLY – perform data loads (Non-Sage 50) ACUITY24</p> <p>ONLY – perform data loads via API (Sage 50 only)</p>
23	ACUITY24 ONLY – Internal reconciliation and QC
24	1-2-1 – Reconcile balances, Sign off Go Live phase via DocuSign
25	Hypercare

Note – you will not be able to begin transactional processing until the Go Live phase has been reconciled and signed off.

# Week 6 – Live Transacting

# Week 6

In the sixth week, you'll be transacting and running live in your new system, as fully functioning Sage Intacct users.

The Acuity24 Service Team will be on hand to assist with queries that can be raised through Acuity24's Customer Portal, which you'll be familiar with having used this throughout your project.

During the week an internal project handover will take place where your consultant will handover the project to our Customer Success team.

At this point your onboarding is complete.

# Week 6

Day(s)	Detail
26	Hypercare
27	Hypercare
28	Hypercare
	ACUITY24 ONLY – Internal project handover
29	Hypercare
30	Hypercare

# Week 7 & Beyond – Onboarding success

# Week 7 & Beyond

In week 7 you'll be introduced and transitioned to our Customer Success and Support teams who will be responsible for ensuring continued success and adoption of the product, and dealing with any day-to-day queries that you may have.

You will be asked about your future plans for the solution, and we will work together to provide you with a longevity of success using Sage Intacct.

Additionally, we will start to send invites to our Knowledge Lab webinars and On-Demand training videos with the Acuity24 Customer Portal.