Converting to Compass ERP
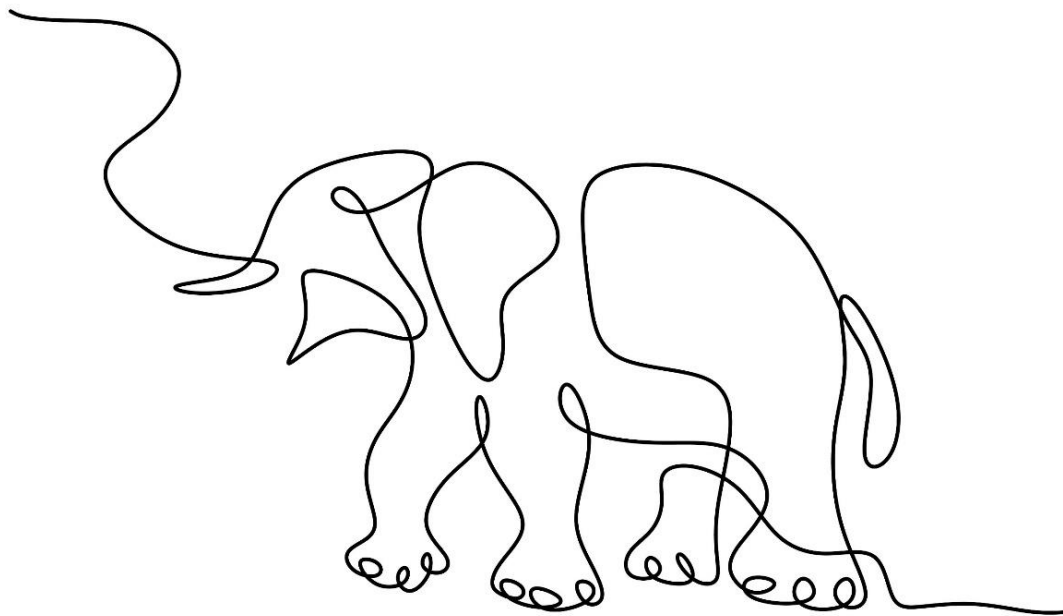
A white paper from Greycoat Software

> **"When eating an elephant, take one bite at a time." — Creighton Abrams.**

The central idea behind this oft quoted aphorism, is to take on a complex task by breaking the job into small pieces.

Here at Greycoat Software we have refined the process of implementing our Compass ERP software to a fine art.

We all have experienced frustration with software at one point or another and so these stats seem very believable.

While employee retention and attracting excellent job candidates is one impact, good software also has other direct impacts: reduced training times, increased productivity and morale, and improved corporate prestige. And yet, with all that, companies are often reluctant to change their software. Changing software can be a disruptive and daunting exercise, but at Greycoat we have found that the conversion process has become much easier over the years, partly due to our experience, and partly because of improvements in methodology.

This white paper will look at key points in our implementation methodology that make each transition a smooth one.

(* - Source - https://learn.g2.com/state-of-software-happiness-report-2019)

We think this is good news for our prospects and customers. In a recent study *, consulting group G2 found that 52% of the employees in their survey were "unhappy at work because of the software tools they were using", and 24% of all employees were unhappy to the point of "considering leaving their jobs". In fact, 1 in 8 employees had quit a job at some point "because of the software they were required to use".

1. Implementation Planning

Before contract closing, we establish the project objectives and the scope of the project in some detail. Setting the scope involves a determination of the departments and locations to be affected by the conversion and the functions to be handled by the software in broad terms, as well as any unusual business characteristics. From that we determine the Compass ERP modules the customer will be implementing, and also provide a written overview of the objectives and scope, as well as a high-level data flow diagram, all pertaining to the specific client implementation. (We also have a library of documentation on the software modules including fact sheets and manuals to help inform our clients during the sales process.)

Having done this, we can provide a **fixed quote** for the labour part of the project, based on the scope defined in the overview document.

2. Identify local hardware vendor and Windows and networking support

On the hardware side, we will advise on any hardware improvements or acquisitions that will be required to run the software, including essential Microsoft products like Office and SQL Server. Most of our work as a software vendor can be accomplished from our offices in Waterloo, Ontario, so it is essential that we work with a hardware and network vendor that operates in the customer's community. That way, on site emergency support can be provided rapidly, especially important for computer equipment running in remote areas like quarries

and scale-houses. In the event of an equipment failure, your local vendor needs only to get the equipment operational at a basic level, with live communications restored. We can then go on to apply any required corrections to the software or data.
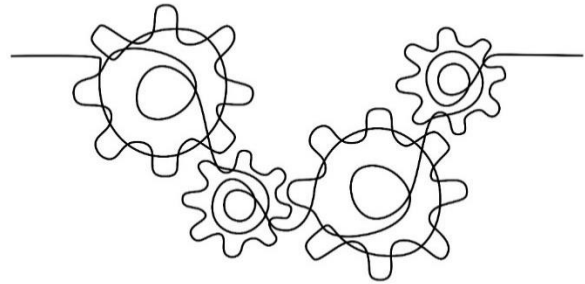
3. Using YOUR Data

Before we begin the implementation, we will convert your existing data for use by the Compass ERP programs. Your staff will relate to the software much better and learn much more quickly when they see existing product descriptions, customer names, trucking information, price lists and so on.

4. Step by Step Process

We use a time proven step by step outline to lead your company staff through the training and pilot implementation process. The schedule also includes technical work for our employees and your supplier or I/T department including installing software, obtaining hardware and Internet connections, and interfaces to outside software. We also define key implementation milestone dates for top management's benefit.

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5. Training sessions

These days most training sessions are carried out across the Internet. This allows for sessions which are shorter and tied to the work schedule. (By contrast, at one time we would train in the classroom for a solid week, and then work through the schedule. Staggering the sessions into smaller chunks so that you learn, try, and check the results, then repeat, if necessary, induces more confidence and is more efficient than a classroom approach.)

6. Help line support

We provide help line support through the implementation period as well.
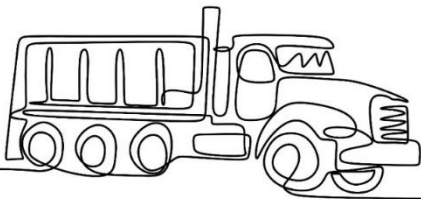
7. Built on quality

On the Capterra web site Compass software is currently rated 4.8/5 stars by our user base. The reviews mention our rapid response on software issues and on help or 'how to' assistance. The secret to maintaining good service turnaround is to produce high quality software in the first place. Receive fewer calls on defects means that we can respond more quickly when a call comes in.

We are very cautious with our testing and software release protocol just so that we can maintain a high service standard. Contrary to some rumours, no reputable software company makes money correcting defects. When we do fix a defect, it's covered by our extended warranty.

8. Software Features

The Compass software provides a number of built-in features which simplify the implementation process.

Our software is built on hybrid transaction-analytic processes or **HTAP principles**. What this means is that mistakes found in summary ledgers, say a Job Cost ledger, are easily traceable to source transactions, which can be corrected and reposted. Or, in inventory, mix tables and other inventory parameters can be corrected, and the corresponding transactions regenerated. No complex adjustments to make.

Another simplification is the use of a consistent graphical user interface. The entire system is based on **Microsoft .NET**, Microsoft's application framework.

We also design our screens to show massive amounts of data. For example, you can review an entire day's or entire week's worth of delivery tickets to check for pricing and other issues. You can regenerate pricing for an entire invoice, or change multiple tickets with an incorrect product number, say, with one data entry.

Finally, while we do embrace cloud-based software for Dashboard and remote reporting, our core software is on premise, providing snappy response times and high throughput volumes that are unmatched.

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9. Train!

Even though we simplify the entire process of converting to Compass ERP, it is still work. It is not responsible to over-simplify the work that is required. The point is that with good planning and preparation the process need not be a painful one. The chart below lists the business processes for which we train office staff concerned with Invoicing. Similar training agendas exist for Inventory, Scalehouse (SHIP), Quotations, Order Management and Scheduling, Dashboard and other modules. A software module that provides only limited functionality will not improve productivity, and may in fact, decrease it.

TRAINING ELEMENTS FOR OUR INVOICING MODULE.

Data conversion of existing tables - review.

Set up fiscal calendar

Run checkout in test account with loaded/ entered customer data

Base Table maintenance

Customer, trucking firm, product maintenance

Job site entry and Pricing maintenance

Daily batch processing

Ticket entry (manual tickets, drop shipments)

Ticket void

Invoice run, trucker statement run

Invoice interface to client accounting system

Trucker statement interface to client accounting system

Additional charge calculations - levy, fuel surcharge, other surcharges

Cash sales cycle

Balancing procedures

Ticket corrections and adjustments

Sales Reporting procedures

Automatic emailing of invoices

Sales Reporting reports

Default and customer-unique configuration settings such as invoice format, system of measurement

Setup of automated daily sales reports package

Archive of invoice PDFs - search

10. Work with the right tool.

Working with the right tool for your business simplifies the entire conversion process.

Compass is:

- ERP Software for the production and delivery of construction and building materials.
- Not an inadequate add-on for construction job costing software. Material sales and production has unique business and accounting processes.
- Not generic manufacturing or distribution ERP that needs expensive tailoring for heavy materials.
- Not generic Invoicing with limited functionality.
- The tool to manage your business requirements, your challenges and your progress.
- Built on Microsoft .NET with full integration to MS Office.
- Provided with a structured training and implementation program to retool your business.
- Provided with ongoing support and help desk to keep you moving forward.

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