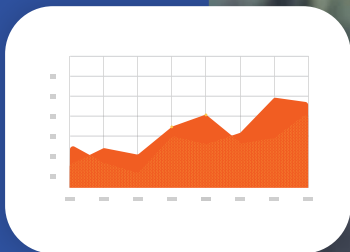


# Frequently asked questions

Transitioning from legacy software to Financials





1

## Do you have plans to 'end of life' my finance system?

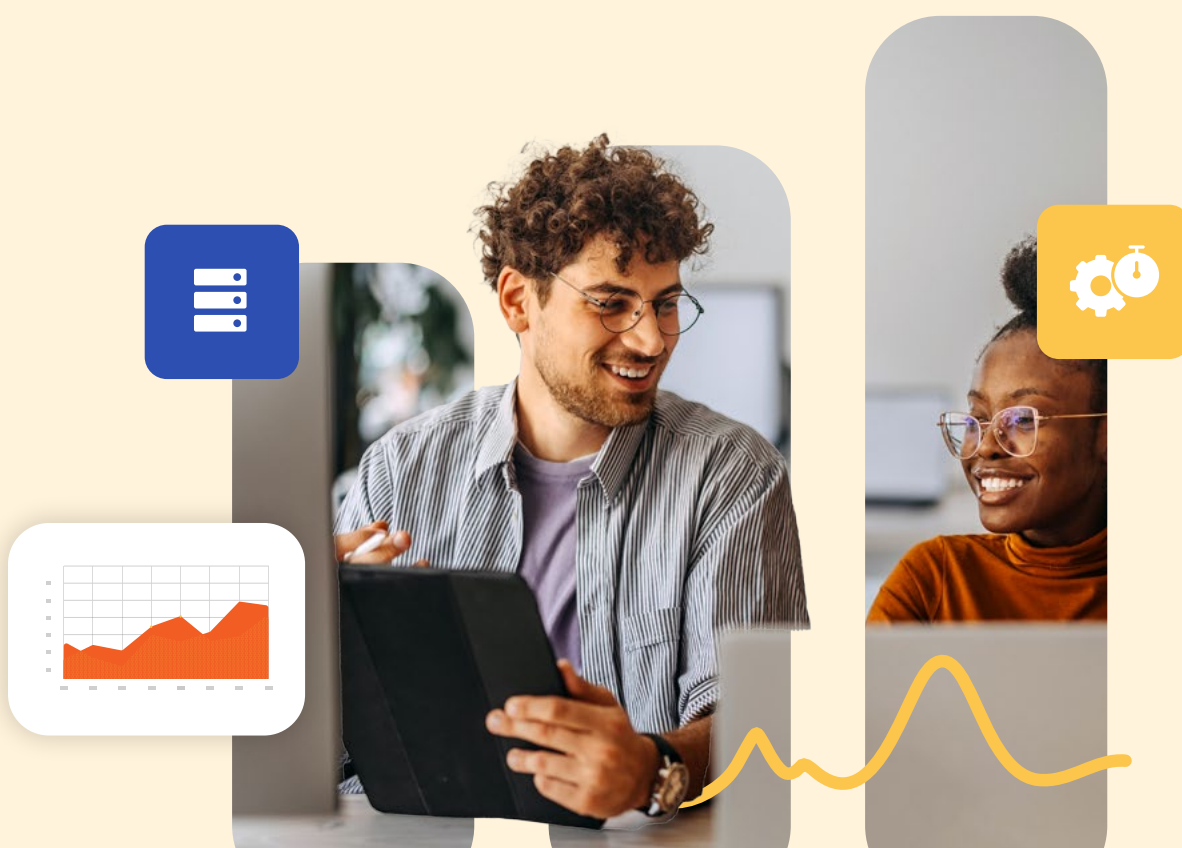
We are committed to maintaining your current systems across OpenAccounts, e5 and eFinancials and have no plans to phase them out. We uphold our contractual commitments to continue to ensure compliance with legislative and security standards.

While development on your existing finance system's roadmap has concluded, now is the ideal time to begin your graduation upgrade to Financials, which benefits from a continuously evolving roadmap. This graduation upgrade will ensure you have access to the latest product and feature enhancements, positioning your operations for future success.

2

## Why should I move to Financials?

Transitioning to Financials offers substantial value, security, and scalability. By eliminating the need for costly on-premises infrastructure, it ensures cost-effectiveness while providing robust security with data encryption and regular updates. The scalability of the solution allows it to adapt seamlessly to your business growth and evolving needs, ensuring your financial operations remain efficient and secure. This makes it a smart, adaptable choice for managing your financial processes with confidence. [Learn more here.](#)



**3**

### **Why should I consider OneAdvanced the safest pair of hands for my cloud finance management system journey?**

At OneAdvanced, we've designed our cloud finance product and services to make transitioning from your legacy system effortless. With over 30 years of finance system expertise and team members with strong financial backgrounds, we bring your operations into the cloud smoothly and confidently.

If you've used our systems like OpenAccounts, eFinancials, or e5, no one knows your business, systems and processes better than we do, which means we can begin to make a big impact from Day One.

Since forming the Graduations team a year ago, we've seen significant success, with many customers now live on Financials and more transitions in progress. We're committed to making your move to Financials easy and efficient, providing full support every step of the way.

**4**

### **What does the migration process involve?**

Our dedicated Graduations team alongside our Professional Services delivery team will support you at every stage of your modernisation journey. With our streamlined 24-week process, we ensure a secure and efficient transition, expertly extracting and remapping your data using purpose built tools to seamlessly migrate it from legacy systems to Financials.

Our process is thorough and reliable, already benefiting many of our customers who are successfully moving to Financials. From data migration to maintaining system integrity and providing ongoing support, we ensure a smooth transition to Financials with minimal disruption. [View more information on our graduations upgrade process.](#)



5

## Will there be any downtime during the migration?

While some disruption is inevitable during the transition, we do everything possible to minimise it. Having successfully guided numerous customers through this process, we understand your concerns and are equipped to address them effectively. Rest assured, we strive to make this transition an empowering step forward, keeping any interruptions as minimal as possible while you enhance your business operations.

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## How secure is my data in the cloud?

Security is our top priority. We employ advanced encryption methods and adhere to strict compliance standards to protect your data. Our cloud solution, hosted by AWS, offers robust security measures that often surpass those of traditional legacy systems, ensuring your sensitive financial information remains safe and secure.

As a trusted provider for the UK government, AWS is part of the One Government Value Agreement (OGVA), which enhances cloud adoption across public sector organisations through advanced security and efficiency. Furthermore, AWS's significant contract with the UK Home Office underscores its commitment to delivering secure and reliable services, providing assurance that AWS meets the stringent requirements expected by government entities.



**7**

## What if I have upgraded my version in the last 12 months?

Your account manager will be on hand to discuss the options available to you, ensuring that these options reflect and acknowledge the investments you've made over the past year. Our aim is to provide you with the support and information needed to seamlessly continue enhancing your financial solutions.

**8**

## What are the cost implications of moving to Financials?

Moving to the cloud often results in long-term savings. You eliminate the need for hardware investments and reduce IT maintenance expenses. Our subscription models allow you to scale as needed, providing cost predictability and efficiency. [Speak to your account manager](#) to realise the cost savings that can be achieved by your business.

**9**

## How much data is brought across from my existing solution to Financials?

A standard migration includes the following: current year General Ledger (GL) transactions, last year's GL balances, and opening GL balances. Additionally, it covers open Accounts Payable transactions, open Accounts Receivable transactions, open Purchase Orders, open Goods Received Notes, and active Fixed Assets.







10

## How can I easily meet HMRC's requirements to maintain a seven-year history of financial records?

You can either host an archive version yourself, giving you full control and accessibility, or migrate your data into your new Financials instance for a streamlined experience.

By choosing to stay with our service, you ensure continuity and avoid any potential challenges. [Contact your account manager](#) for more information.

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## How long can I access the existing software for?

If you decide to host your data yourself, we'll give you a seven-year archive licence for easy access and control over your records.





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## What kind of support can I expect during and after the transition?

We are committed to supporting you throughout the entire transition process and beyond. Our Customer Success team will work closely with you to proactively offer training and advice to help you maximise the return on your investment. Post-migration, we offer ongoing support and resources to help you maximise the benefits of Financials.

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## How does the Financials roadmap help me?

Financials is more than just a cloud application—it's your gateway to continuous innovation and future-ready capabilities. Automated monthly updates deliver the latest features without major upgrades, minimising disruption with changes applied outside business hours. You can test new features in advance, ensuring smooth integration. By choosing Financials, you're not just investing in today's technology but in tomorrow's advancements, keeping your business at the forefront of success and innovation.



**14**

### **What impact will moving to Financials have on my existing integrations?**

To integrate with Financials, we redirect existing integrations using our interface tools. Our Import Tool Kit (ITK) allows seamless data import from external systems via CSV or flat files, while our API, with over 500 endpoints, offers direct integration. For complex needs, our dedicated integrations team provides expert support. During your project, we offer comprehensive training on our integration tools and collaborate closely to ensure all your needs are met. We're also continuously expanding our library of "out of the box" integrations to include additional products, common business tools, and partner applications, enhancing ease and efficiency in integration.

**15**

### **What is the AI strategy with Financials?**

At OneAdvanced, we leverage emerging technologies to boost customer efficiencies. Our dedicated focus areas include User Experience, Data Science, and Business Intelligence. Our AI-driven Purchase Invoice Automation captures supplier invoice data effortlessly, eliminating the need for templates. Looking ahead, we're enhancing error handling in data entry and refining debt-chasing insights to deliver precise, actionable information tailored to customer behaviour.

**16**

### **How does Financials distinguish itself from your competitors?**

Financials incorporates all the standard financial management capabilities and builds on them in a comprehensive suite of modules, delivering real-time insights through integrated planning, reporting and dashboards. Powerful integration options are also available through API and flat file, bringing all your solutions closer together. You can customise your dashboard for a personal experience, making it easy for non-finance professionals to navigate.

We're known as the top finance system for those new to finance, offering an interface that simplifies access to essential information for everyone. With Financials, you will enjoy a finance solution that adapts to you and your team seamlessly, with advanced features for better insights and smarter decisions. Plus, with powerful reporting and business intelligence, you get the data you need to act confidently.

With OneAdvanced, financial management extends beyond a simple finance system, it encompasses the entire CFO agenda, including [spend](#), and [risk management](#).





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**Could you help me connect with other customers who have graduated their software with OneAdvanced to learn about their experiences?**

Yes, absolutely. Contact your account manager directly or [enquire here](#).

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**What if I choose not to graduate?**

Our commitment to advancing your financial solutions is unwavering, and we have a clear vision for transitioning to our new financial system. We acknowledge that each business has unique needs, and while we prioritise this transition, your choices are respected. Should you decide otherwise, your account manager is ready to discuss alternative options with you. It's important to emphasise that our strategic decisions and investments are firmly aligned with Financials, ensuring that we provide cutting-edge solutions tailored to your evolving business requirements.

**By moving to Financials, you're not only adopting modern technology but also partnering with a team dedicated to your success. If you have any more questions, feel free to reach out to your account manager.**



# About

**OneAdvanced is one of the UK's largest providers of business software and services with a £220m turnover, employing 2,000 people, and serving 20,000 customers.**

We use our experience and expertise in digital transformation to help you on your journey to the cloud. We act as your digital partner, working with you every step of the way, from research, right the way through to go-live and training. Ultimately, our aim is to help businesses transition to the cloud at the right time and in the right way, so they can grow, innovate, and prosper.

**Get in touch**

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