# Nexonia Customer Launch Kit

## Dear Customer…

Thank you for choosing Nexonia! Now that you've completed implementation, you are ready to roll-out Nexonia to your organization.

This Launch Kit is designed to provide you with the tools you'll need to ensure a successful launch, based on best practices from the Nexonia Customer Success Team – Customer Success Managers, Implementation Specialists, Trainers, and Customer Support. We have a lot of experience on our side.

Please use this kit in any way you need. We have included training material, links and directions to other resources, and some recommended best practices to help improve user adoption and reduce the number of questions your users may have with your new automated expense and time management tool.

Welcome aboard!

Your Nexonia Customer Success Team

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## BEST PRACTICES FOR COMPANY ROLLOUTS

### Communicate

No one likes changes – we know. On top of change, no one wants to be surprised by it. Relay the message that a new (great!) system is coming and do it early and often. The more you communicate, the less push-back you'll experience. We've included some announcement templates in the appendix of this kit to help you out.

### Be Positive

Implementing a new system for a whole organization can be frustrating and a LOT of work on you. Positivity and negativity run from the top down. Keep the message clear that the new process will make things easier and will be a positive change.

### Be Clear

Define your policies and workflow, and make them known and clear. It will be easier for users to learn a new process if they're already familiar with the rules and expectations.

### Require Training

Set a date when users should have viewed the training videos. We'll provide you with links to webinar registration, guides and videos in this kit.

### Pilot

Consider using a pilot group to try the system out. A pilot group is beneficial in all areas. Not only do they give you the first impression of the new system, but they also may identify things that you may not have thought to add to your configuration.

# Pre-Launch Reminders

## Enter Internal System Administrator Contact Information

This can be set in *Settings* > *Company* > *Regions*, click on the relevant region and use the Administrator tab to set the internal regional administrator.

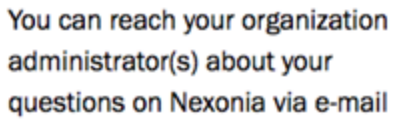


Figure 1 - User View of Internal Admin Contact

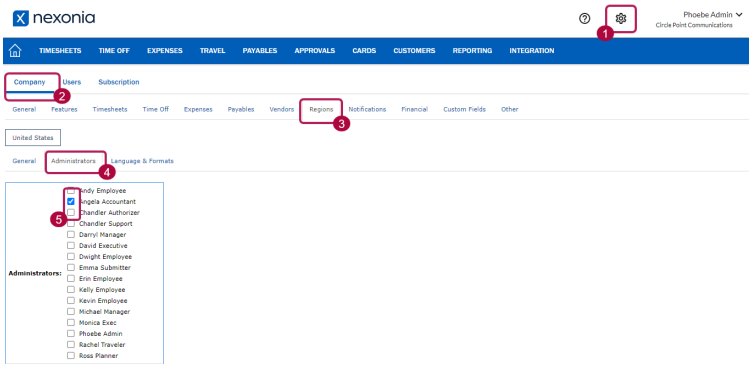


Figure 2 - Regional Settings for Internal Admin Contact

## Send early communication prior to release date

Use the email templates included on help.nexonia.com to build awareness and excitement for the new process:

- "Welcome to Nexonia" Email Templates

## Define and communicate internal policies PRIOR TO LAUNCH

We recommend defining and communicating your internal policies prior to launch so employees are aware of what rules are in effect.

- Launching Nexonia Expenses: Define Internal T&E Policies Pre-Launch

## Upload A Copy of Your Policy Document for Users

Administrators can upload a copy of your internal expense and time policy documents in Nexonia at the Region level, and it'll be accessible to your users on the web.

- Uploading an Expense Policy Document
- Uploading a Time Policy Document

## Best Practices for Automated Expense & Time Management

A successful rollout will depend on two things: learning how to use the new system, and changing old habits.

Nexonia is designed to make things easier for the end-user – submitters, approvers, finance – they all benefit from automation and the tools provided. But the tool can only do so much if users are still practicing bad habits.

Our best advice is: have employees correct their own errors and know they can go to help.nexonia.com for detailed instructions or technical assistance.

We've collected some best practices that you can consider including in your new processes which will help your organization get the most benefits from Nexonia.

### Expense Submitters:

**Use receipt capturing tools to your advantage** – save receipts as you go with the mobile app and forward online receipts to Nexonia via email so everything is on-hand when you're ready to create your expense report.

**Enter mileage on-the-go using Nexonia's mobile app** – use the mileage function to create entries on-the-go, bookmarking regularly used addresses in the app itself.

### TIMESHEET SUBMITTERS:

**Use the mobile app to track time** – encourage employees to track their time using the mobile application. Entering time on the go improves frequency and accuracy of time entries.

**Submit on a timely basis** – ensure employees know what your expectations are for when timesheets are due. Set reminders for your approvers in the notifications to keep on top of things.

## Approvers:

**Have employees correct their mistakes:** send items back for corrections and legible receipts, ask for more information from the submitter, or provide details why the submission is being refused.

**Review and approve via Nexonia's mobile application –** Nexonia Expenses and Timesheets can be approved directly in the mobile application.

## ACCOUNTING/FINANCE:

**Use reporting to monitor behavior** – using reporting tools to extract and review expense reporting data on a regular basis means you can track any "non-compliant behavior" submissions, review expense policies for average spend and policy compliance, and always be audit-ready.

**Use loose policy limits to start –** if you're not already doing so, you'll want to set some policy rules around expenses. Setting up at least loose rules with policy violation flags will allow you to use reporting to identify policy changes needed after a few months. Policy violation flags can be tracked and included in Nexonia reporting.

**Use notification emails to keep users on top of timesheets and expenses** – Nexonia provides notification emails to prompt employees to act, from reminder emails to approvers to notifications if the user leaves their credit card transactions sitting too long. Let the system do the chasing for you.

**Have employees submit on a regular basis** – communicate when expense cutoff dates and timesheet deadlines are and have employees submit on a regular cycle. Monthly expense reports should be the bare minimum, and they can always submit reports for specific trips and events as needed.

# TRAINING YOUR NEXONIA USERS

## On-Demand Training

Nexonia offers on-demand training videos for all users using our Expense product within the End User Essentials section of our Help Center.

Support guides and videos can be found at help.nexonia.com. These resources will help users get started on using Nexonia effectively on the web and mobile applications.

We've collected links to the starting point for your new Nexonia users:

Expenses

Timesheets

Time Off

Purchase Orders & Payables

For all of our training material, please visit End User Training Essentials and Admin Training Essentials. Find scripts, tutorial and how-to videos, change management guidance, and step-by-step instructions to get up and running in no time.

# GO LIVE – LAUNCHING NEXONIA

When you launch Nexonia with your organization, we recommend these steps as best practice for a smooth transition:

1. Make sure notifications are on at both the system and user level:
    - How to Enable Email Notifications for Expense Approval
    - How to Enable Email Notifications for Credit Card Transactions
    - How to Enable Email Notifications for Time-Off
    - How to Enable Email Notifications for Timesheets
    - Enable Payables Approvals via Email Notification
    - Enable Purchase Orders Approvals via Email Notification
2. Double check role permissions are set correctly for all users, and approvals routing has been enabled for those roles:
    - Assigning an Approval Process to the User Role
    - Configuration Guide to Roles and User Permissions
3. For Expenses, review credit card integration & ignore irrelevant transactions:
    - How to Ignore Personal, Corporate, or Business Credit Card Transactions
4. For web-based integrations, ensure configuration synchronization and exports are running successfully:
    - Synchronizing the Nexonia Configuration with Intacct
    - Synchronizing the Nexonia Configuration with NetSuite
    - Synchronizing the Nexonia Configuration with QuickBooks Online
5. Fill in “Send errors to” fields in integration(s) (ERP and Credit Cards):
    - How to Set Email Notifications for Configuration Sync Errors
    - Configuring Notifications for Company Credit Card Import Errors
6. Delete test transactions:
    - Deleting Expenses
    - Deleting Timesheets
7. Send password resets (if necessary) to alert users they have access to Nexonia:
    - Send Password-Reset Email Notification to Users
8. Send welcome announcement emails to your new users:
    - "Welcome to Nexonia" Email Templates

## Your Nexonia Team

For questions regarding your Nexonia account, subscription, or change requests, please contact your Customer Success Manager at csm@nexonia.com.

### Nexonia Support

# help.nexonia.com

**Tutorials**

**Webinars**

**Configuration guides**

**Troubleshooting steps**

**"Submit a Request" to open a support case**

### Customer Support Hours

**Monday - Friday**

**8:00am - 8:00pm Eastern**

**24/7 System Monitoring**

***Reduced coverage public holidays***