



## What is the User Group?

The Financials & Dream User Group is an organisation where Users can share experiences and ideas to improve their understanding and use of any of the Financials & Dream solutions. We organise workshops, meetings and social events around shared interests. We also create closer links between Users and Unit4 providing an independent, influential voice to represent Users' views and gaining greater insight and understanding of enhancements to products.

## What can it do for you?

The opportunity to work with Unit4 Product Management on future development of both the Financials and Dream products:

- User Group run by the users for the users
- Getting experience from other users
- Networking and socialising
- Learning to optimise the product
- Tapping into consultancy knowledge
- Have an influence on the future direction of the product
- Learn about product updates and functionality
- Meeting like minded individuals

## Who is the User Group open to?

The User Group is open to Unit4 customers who use either Financials or Dream platforms. Unit4 customers are given the opportunity to sign up to the User Group free of charge from the date of signing a new agreement. From the date of the contract this will be calendar year 1 and the next full calendar year will also be free of charge. An invoice will then be issued in calendar year 3.

The membership year runs from 1 January to 31 December. Membership is charged at £325 for a calendar year.

## Members



**Marks&Clerk**  
Intellectual Property Services

**SCREWFIX**

 **GREAT**  
BRITAIN  
VisitBritain *You're invited*

**Oasis**  
dental care

## Quotes from Members

*“Being a member of the User Group has proved to be a real benefit for our Technical people as well as our Users. The workshop sessions open up a fantastic opportunity to discuss how other Companies use the system, and allow us to question our processes. Our Users take away valuable tips and tricks from these sessions which we would otherwise be unaware of. The value this has added for us by far outweighs the cost of the membership.”*

**Sharon Hallett, Oasis Dentalcare Ltd.**

*“Being a current member of the User Group, and an ex-chairman, I and my organisation are given a unique understanding of the current and future Financials product. Each user group workshop agenda is pitched at the specific product and is professionally run. Clear insight to how it operates with users networking on the day. We have worked with CODA for 28 years and upgrade to each version as and when they are produced. Our organisation is global with operations in FX and GBP so the system is used heavily around the world...”*

**Tony Murphy, VisitBritain**

*“The User Group sessions allow all users to meet and to discuss the topics in the sessions and share knowledge and insights, this in combination with the access to the consultant's means that you are able to take more from the sessions than with consultants alone.”*

**Simon Nobbs, Essex Fire and Rescue**

Get involved with the Financials & Dream User Group and have your say.  
Our aim is to improve communication on all Financials and Dream products and with all of the users.

#### WORKSHOP TIMETABLE 2017

##### FINANCIALS

WEDNESDAY 25 JANUARY Unit4 offices, Harrogate	TECHNICAL, HOUSEKEEPING & METADATA BROUGHT FORWARD FROM 2016	Gaetan Yee and Brian Westbury
WEDNESDAY 22 FEBRUARY Unit4 offices, Harrogate	WORKFLOW AND P2P	Vesselina Stefanova
WEDNESDAY 26 APRIL Unit4 offices, Harrogate	CODA XL V 5.2 + ASSETS AND INTER COMPANY	Peter Smith
WEDNESDAY 21 JUNE London, venue TBC	V.14 INCLUDING BILLING	Jane Dolan and Peter Smith
WEDNESDAY 20 SEPTEMBER Oasis Healthcare, Bristol	ARCHIVING AND AUDIT REPORTING	Presenter TBC
WEDNESDAY 22 NOVEMBER Unit4 offices, Eden House, Bristol	WIDKT AND BROWSERS, MASTERS	Presenter TBC

##### DREAM WORKSHOPS AND WEBINARS

WEDNESDAY 26 APRIL Unit4 offices, Harrogate	CUSTOMER SURGERY HINTS AND TIPS	Lisa Armitage
WEDNESDAY 17 MAY Re-scheduled from 22 February Unit4 offices, Harrogate	UPGRADE TO 3.6 3.6 VIEW	Lisa Armitage
WEDNESDAY 21 JUNE Unit4 offices, Eden House, Bristol	DREAM NEW USERS	Lisa Armitage
WEDNESDAY 19 JULY Unit4 offices, Harrogate	UDI's Webinar	Lisa Armitage
WEDNESDAY 20 SEPTEMBER Marks and Clerk, London	WEB SERVICES/TECH HOUSEKEEPING SQL, ETC.	Russell Penska and Steve Hardcastle TBC
WEDNESDAY 22 NOVEMBER Unit4 offices, Eden House, Bristol	ADVANCED REPORTING INDICES	Presenter TBC

#### GET IN TOUCH

Joining the User Group is a quick, simple process. You can either email or telephone our Administrator, Susan Thompson and she will provide all the information that you will need. Once payment has been received, members are entitled to attend any or all of the workshops and webinars available during that membership year.

Susan's email address is [susan.thompson@unit4.com](mailto:susan.thompson@unit4.com) and telephone number is **+44 7787882980**

Our website also provides further information [www.financialsanddream.com](http://www.financialsanddream.com)

