

# CIVICA

Transforming the way you work

# Financial Integration in Housing Management

Colette Jones, Civica Housing and  
David Filler, Civica Financials

Platinum Sponsor



**Civica** Exchange

# “One System”

- ▶ Housing organisations are increasingly looking to procure a “One System” solution
- ▶ Integrating
  - CRM
  - Housing Management
  - Contractor Management
  - Asset Management
  - Financials
  - HR & Payroll
- ▶ Why? To replace multiple systems, avoid complex interfacing, one version of the truth
- ▶ Examples – EPIC, Eastbourne & Lewes, DCH Group





- ▶ DCH (formerly Devon and Cornwall Housing) is a leading housing group, managing and delivering services to over 23,500 homes.
- ▶ Supported by a team of over 850 staff working together to deliver services across Devon, Cornwall and Somerset.
- ▶ 2006 - Penwith HA joined Devon and Cornwall Housing
- ▶ 2007 - Tor Homes joined Devon and Cornwall Housing
- ▶ 2012 - Partnered with West Devon Homes (WDH)
- ▶ 2015 - WDH amalgamated with DCH
- ▶ 2017 - DCH in merger talks with Knightstone HA to become a new company



A fully integrated software system to replace the current multiple systems for housing management, repairs and contractor management, asset management and financials.

Cx

Civica housing  
Management  
solutions

Keystone

Civica housing  
Asset  
management  
solutions

Financials

Civica financials  
Financial  
management  
solution



Choose



Implement



Transform

The digital platform **for social housing**

## – objectives

- ▶ To provide effective support to a range of internal processes and to deliver an improved service to customers from a system which will:
  - Be easy to use
  - Enable the easy extraction of key performance information and management reports
  - Maximise support to staff by providing easy and effective access to up to date information
  - Offer access to customers and users through web interfaces
  - Integrate/Interface fully with any other systems as required
  - Enable the company to maximise the advantages of new developments in technology
  - The Company aims to achieve efficiencies, wherever possible. To achieve efficiencies it is best to look at the global view of systems rather than 'bolting' on extra software modules.



## – the approach

- ▶ Suppliers invited by DCH to attend a Supplier Open Day
- ▶ Supplier Open Day gave suppliers opportunity to discuss the forthcoming tender with multiple groups representing different parts of the business
- ▶ Demonstration day followed to DCH
- ▶ Once merger with Knightstone in progress, demonstration day repeated to Knightstone
- ▶ ITT issued with combined requirements via the LASA procurement framework
- ▶ Joint clarification demonstrations to DCH and Knightstone



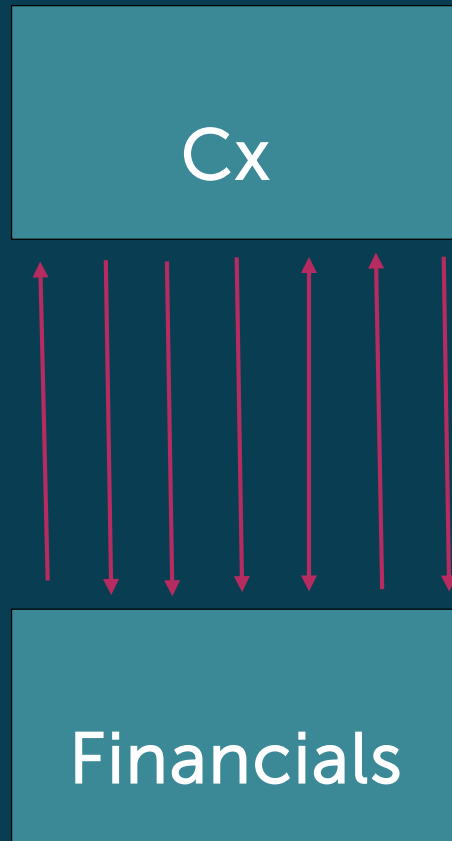
- ▶ Financials Web based solution ensures self service capability
- ▶ Multi Company Financials solution as standard
- ▶ Other Financial modules enable future inclusion & allows for future business growth
- ▶ In excess of 90 clients in public sector of all sizes & configurations
- ▶ Fully Flexible solution allows for 'templated solution' for specific sectors
- ▶ Full integration between Housing and Financials either as live integration or interface Batch mode
- ▶ Integration capability does not remain static
- ▶ Where company grows increased level of integration grows with requirement



- ▶ Key component of solution was integrated templated Finance Solution for Housing
- ▶ This included GL with e-budgeting & Forecasting & Payroll Budgeting, Creditors with CIS & Intelligent Scanning, Purchasing inc Contract Monitoring, Sundry Debtors, Financial Asset Management & Cash Book
- ▶ The impact of the HA merger - inclusion of the Shared Service Cross Company Charging module
- ▶ Multi Company capability with cost sharing and consolidated accounts capability
- ▶ Integrated Financial & Housing solution ensures 'One Version of the Truth'
- ▶ Full scope of requirements was met by solution

# Civica Financials

## Civica Financials - Cx Integration



ID	Description
1	Supplier synchronisation to Cx
2	Repairs invoices from Cx to Financials
3	GL validation/Funds Checking by Financials for Cx transactions
4	Repairs Commitments from Cx to Financials
5	Registration of invoices in Financials then send HMS ones to Cx
6	Drill through to data in Cx to display in terms of Works Orders
7	Rents debits from Cx to Financials

# One Solution – One Supplier

- ▶ Financials integration
  - CRM
  - Housing Management
  - Contractor Management
  - Asset Management
  - HR & Payroll
  - Other
- ▶ One Solution - One Supplier
- ▶ One line of support
- ▶ One fully integrated Civica solution
- ▶ One version of the truth



# CIVICA

Transforming the way you work

# Questions?

Platinum Sponsor



**DUKES**  
BAILIFFS LIMITED

**Civica** Exchange

# CIVICA

**Transforming the way you work**



[www.civica.com](http://www.civica.com)



[linkedin.com/company/civica](https://linkedin.com/company/civica)



[@civicaUK](https://twitter.com/civicaUK)



[/CivicaUK](https://YouTube.com/CivicaUK)