

LEVEL8 Overview





We are the CODA experts

Your Unit4 Financials by Coda Elite Partner



Level8 Solutions Ltd

Overview

[Filing history](#)

[People](#)

[More](#)

Registered office address

41 Percy Rd, Chester, CH4 7EY

Company status

Active

Company type

Private limited Company

Incorporated on

2 September 2014

Level8 Software Ltd

Overview

[Filing history](#)

[People](#)

[More](#)

Registered office address

41 Percy Rd, Chester, England, CH4 7EY

Company status

Active

Company type

Private limited Company

Incorporated on

5 February 2016



LEVEL8: Our Coda Heritage



Connected to Coda/Science
Systems since 1994



Hundreds of years of direct Coda
experience



Most Associates are
ex-Unit4 (Coda!)
employees or users

All disciplines

LEVEL8 | Unit4 Partner Credentials



Elite Partners

These are companies that consistently demonstrate the ability to meet the highest level of success with Unit4 and customers.



LEVEL8 | Unit4 Partner Credentials





Applicable Standard(s): ISO 27001:2022
Project Number(s): 26/0212 - 33220
Audit Start Date: 20.04.26
Audit Finish Date: 28.04.26

Executive Summary

Basis of the Audit
This audit was based on the defined management system scope and the requirements of relevant regulations, legislation, standards, and the associated management system as per supporting notes defined within this audit report.

The audit process is based on random sampling and, therefore, nonconformities may exist which have not been identified.

ISO 27001 certified since 2017

Auditors Overview

The organisation continues to operate a mature and well-established Information Security Management System aligned with ISO 27001 requirements. The ISMS is effectively embedded within the organisation's fully remote, associate-based operating model, with controls applied proportionately and supported by documented policies, contractual arrangements and technical measures. This operating model is well understood and appropriately supported by the design and implementation of the ISMS.

The audit demonstrated a high level of engagement and transparency across personnel, with clear evidence of defined roles, responsibilities and consistent operational practices. The associate-based structure provides a flexible and resilient delivery model, with associated risks in areas such as asset management, supplier oversight and information classification appropriately recognised and managed through the ISMS.

Strengths identified:

- **Leadership commitment:** Clear ownership and accountability for the ISMS at senior level
- **Risk management:** Comprehensive risk register aligned to Annex A controls
- **Training and awareness:** Consistent and embedded across the organisation
- **Supplier management:** Effective third-party due diligence and ongoing oversight
- **Continual improvement:** Active maintenance of the SoA and supporting documentation

Conclusion

Major NCs	0	Minor NCs	0	Observations	6
-----------	---	-----------	---	--------------	---

During the audit 0 major nonconformity(s) and 0 minor nonconformity(s) were identified. Observations have been raised where appropriate. Any nonconformities and observations are detailed in the "Continual Improvement Record".

Centre for Assessment's audit objectives, as defined in the audit plan, were achieved. The certification scope is appropriate.

The Audit was Satisfactory: Continuation of certification is recommended.

Meet our Partners

Our partners help us deliver a great People Experience — here are the expert teams we work with around the world.



A Better Experience, Together

At Unit4 we take a **strategic approach to partnerships**. Each member of our extensive partner network has been carefully selected as specialists in their respective markets, to help us add real value for all our customers — regardless of your size or industry.

Look us up on
Unit4.com or click
to the next slide...

Unit4 Partner Directory

Level



Type



1 selected



Industry



Region



Reset



Partner	U4FbC services – Elite
Level(s):	
Partner Type(s):	Go-To-Market (GTM), Certified Services Partners, Unit4 Cloud Migration Certified
Industry(ies):	Professional Services
Product(s):	Unit4 Financials by Coda, Unit4 Talent Management
Region(s):	UK and Ireland, North America, Continental Europe, Middle East, Africa

Level8

Connected to Unit4 Financials by Coda (aka Coda) since 1994, we have gained literally hundreds of combined years of Coda heritage, mostly through working as employees of Unit4 or as direct users of the Coda product.

We are tried-and-tested professionals in systems implementation, integration and custom software development – with a worldwide customer base.

With customers across all verticals, our deep knowledge, understanding and track record of success with Coda put us in a unique position to assist all Coda users on their exciting transformation to the cloud, and to a higher ROI from their service.

ISO27001 accredited since 2017, we take pride in our approach to delivering robust solutions and work closely with our customers to achieve success, time after time. Just look at some of our [testimonials](#).

Level8 offer the following services for Coda:

- Project analysis and scoping
- Project planning and project management
- Application Consultancy:
 - Implementation
 - Upgrade
 - Continual ROI Improvements
- Managed Services
- Hosting Services
- Software Integrations
- Custom Software Solutions.

[Go to partner website](#)[Close](#)

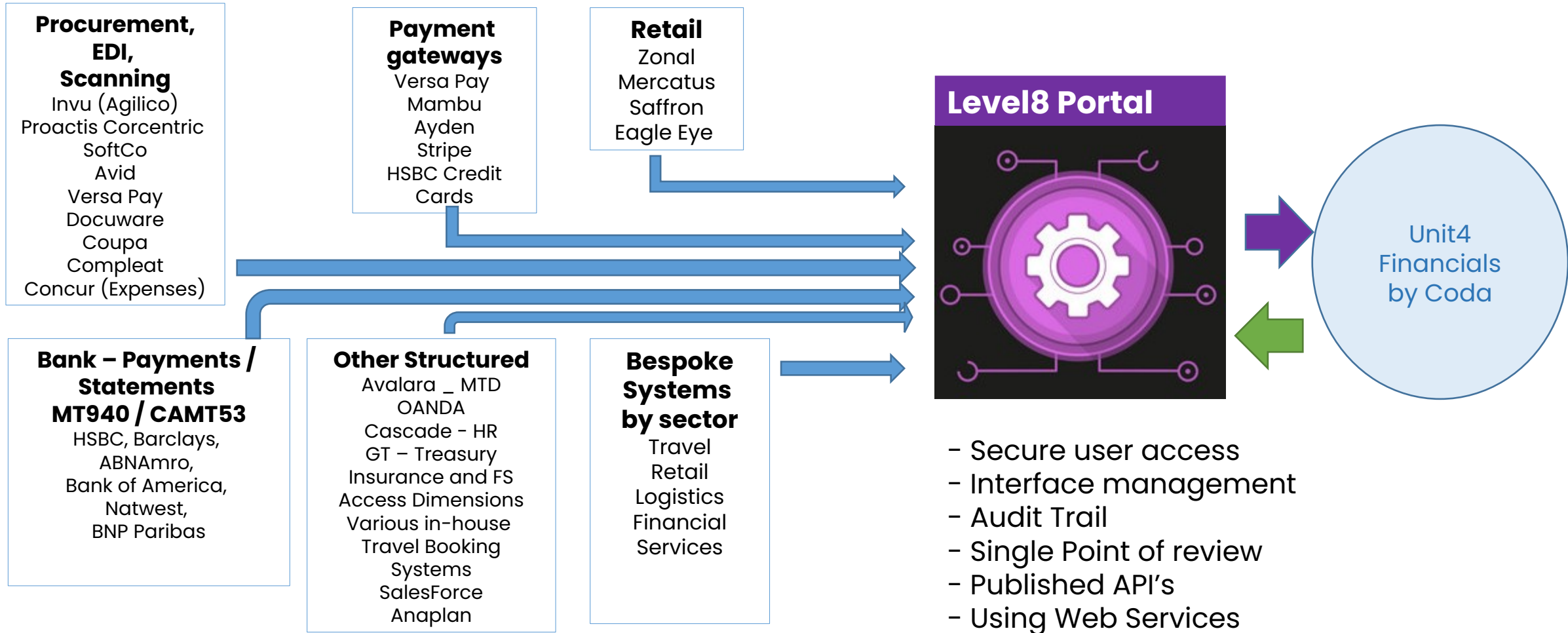
LEVEL8 Services

- Project analysis and scoping
- Project planning and project management
- Application Consultancy
 - Implementation
 - Upgrade and/or SaaS Migration
 - Continual ROI Improvements
- Managed Services
- Hosting Services
- Software Integrations
- Custom Software Solutions

LEVEL8 as your implementation partner

- Project SOW agreed upfront
- Project Initiation Document involves all parties
- Application Design Workshops Map & Document all Business processes
- Dedicated PM Process with proven track record in;
 - Implementation
 - Upgrade and/or SaaS Migration
 - Continual ROI Improvements

LEVEL8 Portal – “Our Integration highway”



LEVEL8 Software Complementary Products



Statement Matching Software (SMS)

Automatic downloading and importing bank statements
Integration using Coda published API's
enhanced matching capabilities



Payment System Extensions

Supports multiple legal entities to reduce the overhead of running pay in multiple companies
Enhanced file encryption
Secure file transfer



Level8 Portal and Level8 Cloud Talk

Allows applications to talk to each other using Web services and published APIs
Support ALL technical environments

- On premises only installation
- On premises to Cloud
- Cloud to Cloud



Level8 to cloud host client side ETL layers subject to discussions

Customer Verticals (last 5 years)



Financial Services



Asset Management



Retail



Education



Health



Leisure

Customer Verticals (last 5 years)



Manufacturing



Local Government



Logistics



Recruitment & Marketing



IT Services

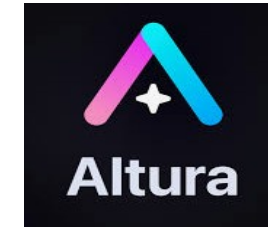


Not For Profit



Caterpillar (CAT) Dealers

A-Z Client list *(last 5 years : Average of 50 active)*



A-Z Client list *(last 5 years : Average of 50 active)*



A-Z Client list (last 5 years : Caterpillar Dealers)

- Blanchard Machinery Co.
- Carter Machinery Co.
- Empire Southwest LLC
- FDC Solutions
- Foley Inc.
- Peterson Holding Co.
- Thompson Machinery
- Toromont Cat
- Unatrading (Mantrac)
- Wagner Equipment Co.
- Wheeler Machinery



What our customers say about us...

<https://www.level8.solutions/testimonials/>



What they say



What they say



What they say



What they say



What they say



What they say

LEVEL8 | Partner Ecosystem



Avalara helps businesses of all sizes remain tax compliant through their market-leading automated tax software. Their cloud-based solutions are both intuitive and comprehensive, covering the full range of transactional taxes including VAT, sales, excise and more.

Avalara and their **Compliance Cloud** platform offers pre-built connectors into most leading business finance and management applications including Unit4 Financials and FinancialForce. Each year Avalara platforms process billions of indirect tax transactions, file hundreds of thousands of tax compliance documents and tax returns, and manage millions of exemption certificates and other compliance related documents.



iCorp have a passion for complexity – when things get complicated, this Unit4 and LEVEL8 partner gets excited! Through the development of highly adaptive and intuitive software, iCorp deliver tailored solutions that enable our customers to handle complicated financial and administrative business processes even more efficiently within Unit4 Financials by Coda.

iCorp's proprietary applications include solutions designed for complex billing, credit management, quoting, budgeting, planning, expense registration, data collection, time tracking, communication and business intelligence.



Intersect are a fellow member of the thriving Unit4 partner ecosystem specialising in Unit4 ERP implementations and consultancy. They are also specialists in SQL Server hosting and management and have a track record of successfully implementing cloud-based platforms for Unit4 software packages.

This specialism in cloud migration and hosting is where we find particular synergy with Intersect, our own software development and support departments also having huge experience with cloud-based Unit4 implementations and the development of bespoke cloud integration tools. Working together our knowledgeable teams are able to deliver solutions to any challenge within your Unit4 cloud migration or implementation.

Director Contacts

Nick.Maiden@level8.solutions

Dan.Barton@level8.solutions

Dave.Anstey@level8.solutions

www.level8.solutions

Thank you for your attention

