Welcome to Access. In this brochure, we explain the key features and benefits of our award-winning business and financial solution, Access Dimensions.

Cut complexity & increase efficiency

Backed by optional software such as HR, payroll, CRM and service management, we’ll demonstrate how our complete solutions cut complexity and increase efficiency across your whole business.
Consulting
Software is a vital tool, but we believe the right partner is the most valuable element of any software change. For 20 years, our consultants have helped organisations like yours to improve their operations, utilising their first-class software expertise and market knowledge to accurately assess and deliver to your needs.

Software
Our modular business software will give you a fully connected platform that can be constantly tailored, now and as you grow. From core financials and reporting to project management and credit control, you can rely on us for a proven solution that’s highly functional and easy to use.

Solutions
Our aim is to provide solutions that meet the needs of your whole organisation. By extending your financial software to cover the rest of your business and administrative processes, you will gain clarity of information across every department and function.

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“We felt confident that Access could provide the whole solution for us and they were a company we could work with.”
Wayne Smith
Birmingham Airport
System-wide benefits

When you choose Access Dimensions, you get a whole range of benefits as standard.

System-wide benefits

From high-performance, scalable technology that grows with your business to in-built functions that simply make life easier, there’s many reasons to choose Dimensions.
Microsoft SQL-based security
Data security is a top priority for any business. That’s why we utilise Microsoft SQL Server, widely recognised as the most secure platform for any business-critical software system. User privileges can be set at various levels, from the database itself down to individual staff and departments, all with tight logon procedures.

Fast & scalable
Microsoft SQL Server has a huge capacity store for historical data, providing you with fast, in-depth access to records and analysis without slowing processing. Access solutions can be scaled to support an increasing number of concurrent users, making our software the ideal choice for growing business.

Integration
With Access Dimensions, data no longer has to be kept in ‘silos.’ Using powerful integration tools, all your modules, tools and applications exchange data in real-time, creating a continuous flow of high-quality information across your organisation. This single step can significantly reduce administration and effort, providing a central source of accurate information on which to base your decisions.

Microsoft Ribbon look and feel
Access Dimensions is based on the latest Microsoft Office user interface called the ‘Ribbon’. This appears as a horizontal strip within the user window, and lets you organise related commands under tabs so that they can be found quickly.

You can easily configure your own Ribbon, changing elements such as icons, names and tool tips, and define new entries, giving you access to external applications, websites and dashboard reports. This makes Access Dimensions easy to navigate and quick to learn, regardless of your level of user experience.

Auditing & enquiries
Access Dimensions brings greater transparency to all your trading activities. VAT reports are provided as standard and ICAEW-approved audit trails enable drill-down to source transactions and document images. Two years’ accounts can be kept open at all times, allowing transactions to be posted forwards and backwards from the current trading period.

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Accounting for Carbon Emissions (ACE)
Embedded into the heart of your solution, this function enables you to capture your business’ carbon emissions data at source and then analyse this information using standard reporting tools. Using ACE, you gain a wealth of statistics that can be used as a basis for reducing your carbon footprint as well as supporting businesses who need to prove evidence of their ‘green’ credentials further up the supply chain.

Corrections
This popular function enables you to make changes to every part of your system. Whether you need to refine your coding system, eliminate duplicate records or rectify a simple mistake, every correction you make is subject to tight user permissions and is fully auditable for total control and visibility.

“Accounting for carbon emissions (ACE) demonstrates that any SME can both demonstrate environmental commitment, and cut costs, without extra expense.”

Philip Dodd
Healeys Print Group
Management reporting

How would you like your reports? Whatever information you need, whenever you need it, Access Dimensions has the right tool for you.

Management reporting

From hassle-free report packs and formal financial statements to Excel-based analytics and graphical dashboards, our reporting suite takes your complex reporting needs and turns them into a series of intuitive steps. Read on to discover more.
Management reporting

**Standard reports**
Access Dimensions offers over 300 reports for every area of your business; simply choose your favourites and get accurate, real-time information at the click of a button. From aged debtor lists to P&L and balance sheets, every transaction from the lifetime of your system can be searched, sorted and subtotalled the way you want it. Business forms, such as invoices and statements, can also be configured to meet your individual requirements.

**Enquiries**
Enquiry screens provide instant on-screen access to a huge array of information. For example, you can look up customer and supplier contact details, study their terms and credit position and view budget/actual costs on projects or nominal accounts. Drill down to display or print source transactions – or drill across to find similar or associated records using flexible Smart Tag technology. Whatever your enquiry, you have easy access to a 360° view of all related information.

**Report Pack Creator**
This module makes the whole process of preparing board reports quick and easy. Analysis, prepared in different software packages such as Microsoft Excel, can be easily collated alongside your core financial statements into one template and ordered as you wish. For ease of navigation, you can add links within the document and brand it with your company logo. The finished document is generated as a single PDF, which can then be distributed to recipients by email or published using web services such as SharePoint.

**Consolidated Reports**
Produce consolidated financial statements at the click of a button. This time-saving tool comes with an in-built wizard to simplify the process of gathering information from across all holding companies/subsidiaries, reducing re-keying and errors.

**Access Analytics**
‘Data cubes’ provide your staff with a highly functional alternative to pivot tables, enabling you to view different elements of your data without creating separate spreadsheets. Data cubes can be easily distributed to decision makers without the need to make repeat reporting requests.

**Access TaskCentre**
We can apply alerts and workflow to any process within your business. This means you can now deploy specific reports to a chosen schedule and to any number of specified recipients. By eliminating the need for human intervention, you reduce costly administrative processes while keeping everyone in the loop.

**Microsoft Office Integration**
Carry out your daily activities and management reporting tasks without leaving Microsoft Excel, Outlook or Word. This easy-to-use feature enables you to attach documents to records, view and approve invoices, search your entire database and much more. This not only makes your standard tasks quicker and easier to carry out, but delivers key decision-making information to everyone that needs it.

**Dashboard**
Track KPIs and trends as they happen with Dashboard. This highly intuitive, graphical tool delivers dynamic data views of your changing business position straight to the desktop.

A wide range of charts and graphs are available, making it quick and easy to track bank balances, top 10 performers, debtors – in fact any KPI of your choice. Entirely browser-based, Dashboard is the perfect complement to the comprehensive reports provided with your Access Dimensions system.

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“Microsoft Office Integration has been absolutely brilliant. I just press a button to export to Excel, manipulate the data and then send the updated information back to the accounts in one go.”

Peter Thomson
Jade Communications

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**Report Pack Creator:** create professional board packs in minutes and distribute to any number of your specified recipients. The module makes it easy to collate documents from numerous sources into one easy-to-use template.
At the heart of your solution, powerful Core Ledgers provide instant access to your essential information. This is supported by a wide range of tools designed to make every one of your routines faster and more effective, from asset management to budgeting and forecasting... even doing your VAT return.

With a heritage that goes back 20 years, you can rely on our financial software to offer you the very best in functionality, reliability and ease of use.
Core Ledgers
Fully integrated to every other module, the Sales, Purchase and Nominal Ledgers store a lifetime of transactions for your whole business. Multi-period and multi-currency, this financial core powers the analysis and presentation of data across your entire Access Dimensions solution.

Nominal Ledger
Your Nominal Ledger is automatically updated by every other module in the system to give you precise information of your financial position, with a flexible structure that allows you to cater for the most complex of divisional and cost structures.

Sales Ledger
Access Dimensions enables you to easily maximise the value of your Sales Ledger, featuring instant, detailed information on your customers’ individual requirements, trading terms and histories. Analyse sales by every demographic that’s important to your business and build stronger relationships while maintaining tight credit control.

Purchase Ledger
A central store for all your detailed supplier information, Access Dimensions gives you the tools to carefully analyse performance at the most detailed level and negotiate the best possible prices and payment terms.

360° Views
This unique facility works along standard enquiry screens to reveal how the chosen item fits into the flow of your accounting activity. Simply click on any transaction within the 360° View (such as a purchase order) and you’ll be able to see goods received notes, associated stock movements and all other relevant information – bringing speed and efficiency to every enquiry.

Budgeting in Excel
Two-way integration with Excel makes it easy to create and revise budgets for every part of your business. Set budgets and revised forecasts for customers, suppliers and projects; even budget for your business carbon footprint by project, department and individual using ACE (see page 5).

Sales/Purchase Ledger Contras
This standard feature reduces admin for companies that trade as both a customer and a supplier. By enabling customer/supplier codes to be matched, outstanding transactions can be ‘contraed’, reducing the overall number of invoices/orders that require processing. You can also link multiple customers to a single supplier and vice versa, increasing efficiency in a holding company/subsidiary environment where many inter-company transactions take place.

Asset Manager
When assets are valued, it’s important to have a precise breakdown of the life cycle of events. With the Asset Manager module, you can record all depreciation, disposal and revaluation history associated with each individual asset in the system.

This information is presented in easy-to-use summary screens that show an asset’s value for the current year at-a-glance and a history for all previous years that the asset has been in existence. With a huge range of detailed reports and powerful drill down facilities, you can trace transactions from the lifetime of your system in the click of a button.

VAT reports & VAT return
VAT reports can be produced on a monthly or quarterly basis, and reprinted at any time for flexibility. The VAT return is generated in the standard HMRC format for ease of submission with a full corresponding audit trail.

Financials & accounting 09
In the current climate, cash is king – so you need to be sure that your money is working as hard as possible for you. Access Dimensions does exactly that.

Cash management

Daily routines such as bank reconciliation and payments can now be handled with the minimum of manual intervention, while our Cash Flow Forecasting module frees you from laborious calculations to deliver a detailed understanding of your future financial landscape.
Cash Book
Flexible day-to-day cash management is provided by the Cash Book module, which updates the Nominal Ledger instantly, whether you’re initiating transactions direct or posting in the Sales and Purchase Ledgers. A full history of receipts and expenses is easily available via drill-down, while everything from petty cash to bank reconciliation is easily managed.

Automated Bank Reconciliation
Ideal for companies with large volumes to reconcile, this time-saving tool eliminates re-keying by enabling you to load large volumes of statement data directly into your system. Excel, text files and multiple bank formats are supported for flexibility.

Once you’ve uploaded unreconciled transactions, simply select from the user-definable matching routines and Access Dimensions will automatically prompt matches for you. Single or multiple transactions are then reconciled with a single click, bringing additional speed to your daily routine. You can also generate nominal transactions where the transaction exists on a statement but is generated outside Access Dimensions. In addition to generating a full audit trail, Automated Bank Reconciliation enables you to clearly track, store and follow up any actions.

The process flags up mismatched information in seconds, enabling you to quickly reverse and correct user mistakes.

Cash Flow Forecasting
Our Cash Flow Forecasting solution contains a mathematical engine that builds financial models entirely electronically and delivers them in Excel. By eliminating the use of manual spreadsheets, you not only save time but reduce the risk of errors.

Using the software, you can create cash flow forecasts for everything from the simplest profit and loss model to the most complex cashflow analysis. You can compare budget to actual performance at P&L, balance sheet and cashflow level.

Robust, time-saving, modelling technology brings together your historical data with current business drivers, calculating and delivering a detailed understanding of your future financial landscape.

Historical data might be drawn from the financial modules for example, and combined with your ‘business drivers’ (business goals, KPIs). The software then outputs the model in a series of charts and/or reports which can be used within everyday decision-making and presented in your report pack.

Models are quick to create and can be adjusted in seconds so you can instantly see the impact different ‘what if’ factors have on the end result.

Multi-currency
Access Dimensions enables simple revaluation of debtors, creditors and bank accounts and cash can be handled in any number of currencies. Cash is easily consolidated into any currency at today’s exchange rate, so you’re always up-to-date. Keeping track of multiple current and deposit holdings and moving money in and out of different currencies is also very straightforward.

Payment authorisation
A flexible and configurable workflow process helps you control and authorise who is paid and when. Once invoices are authorised they can be selected for inclusion or automatically proposed from remittance lists. Once authorised for payment, the system will print or send remittance notes and either print cheques or post BACS payments.

“The Access cash flow forecast and mapping process enables me to find the optimum point to make new asset acquisitions rather than ‘Finger in the Air’ as we did previously.”

Bob Barnard
DBD Distribution

Automated Bank Reconciliation: electronic data import brings significant speed and security to your routine activity. Simply upload your bank statements, select from any number of matching routines and Access Dimensions will automatically prompt any matches.
When it comes to sales, you want to know that every effort is being made to maximise sales opportunities, increase profit and improve customer relationships.

Sales order processing & credit control

Our Sales Order Processing (SOP) module helps you do just that. Accompanied by a range of easy-to-use tools, you have the visibility of information you need to take every order quickly and efficiently, control pricing, and identify when profit can be made.

At the other end of the process, our interactive Credit Control module is specifically designed to reduce your debtor days and improve cash flow.
Sales Order Processing (SOP)
Convert quotes and estimates into sales orders with a single click then find customers by their postcode, customer code or name, or pick from a list sorted by region or salesperson. To add hundreds of detail lines, simply select multiple items from a list or duplicate part of a previous order.

Advanced Price Matrix
This standard function allows you to set a unique price and discount for every combination of customer and stock, enabling you to create promotions at a moment’s notice and track profitability for every item sold. Advanced Price Matrix ensures that promotional prices are restricted to specific windows and can be quickly withdrawn or overridden if necessary.

Colour/size Matrix
Ideal for the fast-moving distribution industry, this tool presents stock and pricing information for product variations (e.g. colour, size) within a single screen, from which you can rapidly create multiple entry lines.

Cross/Up-selling
Access Dimensions helps maximise sales opportunity, proposing alternative items for out-of-stock goods or enabling you to search by attributes if the highlighted items do not suit.

You can also create a list of associated products and services for any stock item and prompt your sales staff to cross-sell them.

Sales Order Templates
This feature further speeds up the sales process by enabling your operators to retrieve templates based on historical customer information and quickly repeat and edit as necessary. Sales Order Templates can also be used on a promotional basis to include sale or slow-moving items.

Repeat Billing
Flexible billing templates have the two-way benefit of providing your customers with flexible payment methods that attract their business while automating and streamlining your billing schedules, cash receipts and BACS collection.

Validating orders
To ensure that every line item is priced correctly, Access Dimensions will check availability, prices, discounts and special offers. Customers are validated against their credit limit and payment history, automatically flagging orders on hold where the customer is over their credit limit (or where the order value will take them over it).

Picking & despatch
Orders are picked to your criteria, from order date, size and value to cost-effective delivery routes and carton size. Picking lists can then be used as the basis to generate delivery notes and instigate invoicing. Order progress and status is tracked through flexible enquiry screens and we can also integrate with your online tracking applications if required.

Credit Control
Our fully integrated Credit Control module provides all the tools you need to reduce debtor days. A central ‘Aged Debtor’ view puts essential information at your fingertips, empowering your staff to re-send documents, such as invoices and statements, and quickly enter information such as next contact dates, payment promises and values while on the phone.

Credit Control comes with a full range of reports, enabling you to constantly monitor your changing debtor situation. An in-built escalation process allows you to change the status of specific debts and create ‘debt parcels’ which can be quickly picked up by a colleague and handled at the relevant level.

We’ve also included an automated routine for write-offs, ensuring minimal time and cost is spent administering bad debt.

“...we’ve seen a reduction in DSO of around 15% in just six months.”

Marion Shaw
Michael Sheridan & Co
Procurement & supplier management

Access Dimensions provides a structured workflow for the entire procurement process, from purchase requests to remittance.

A powerful Purchase Ledger acts as a mine of information, enabling you to easily monitor supplier performance at every level.

Key tasks, such as raising purchase requests, can be instigated by any authorised user, subject to tightly controlled approvals. Purchases can be viewed at any stage of the lifecycle, completing a secure audit trail to build up the widest possible picture of your purchasing activity.
**Procurement & supplier management**

**Purchase Ledger**
With instant access to detailed supplier information and full, flexible purchase analysis, you can interrogate supplier performance at the most detailed level. Once posted, invoices update the Core Ledgers automatically for the most up-to-date picture of your purchasing activity.

**Purchase Requests**
Comprehensive forms capture all the information required by your business with rules to ensure that requests do not exceed your chosen limits. To save re-keying, Purchase Requests can be consolidated by your purchasing manager, with rules allowing your staff to identify key elements such as ‘preferred supplier’.

**Purchase Control**
This module builds an extra layer of control into the purchasing process by automatically checking Purchase Requests and orders against your pre-set budgets. If either fails to meet these rules, then Access Dimensions will instigate an alternative workflow (e.g. allowing the originator to re-submit their request).

**Invoice Register**
This function adds further security by registering all invoices arriving at your business, whether received as an Excel document, PDF or hard copy scan. Within the module, you can see whether quantities match what’s been delivered, eliminating the risks of unauthorised payments.

Configurable workflow ensures that each invoice is verified by the correct member of staff, so there’s no need to chase paper around the office or between sites. Alerts keep the process moving, notifying approvers when their input is required.

**Suggestions for payment**
Invoices can undergo two levels of sign-off before being sent for payment, giving you total visibility of your commitments.

**Remittance advance notes, cheques and BACS payments are all automated, and you can handle advance and partial payments with ease.**

**Purchasing in Access FocalPoint**
Access Dimensions offers full integration with our online solution, Access FocalPoint. By extending the purchasing process to the wider business, you can empower many more staff to instigate tasks such as entering and approving purchase orders and requests – saving time within the purchasing team.

A further advantage is the ability to embed workflow into the software. This ensures the correct information is captured, authorised and updated to Access Dimensions before impacting the Purchase Ledger.

Access FocalPoint also provides access to the Invoice Register via the web, enabling remote-based staff to update goods received and approve invoices anywhere with the internet. For more about Access FocalPoint, visit our website.

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**Purchasing workflow in Access Dimensions:** whatever stage of the buying cycle you’re at, Access Dimensions builds in all the controls to ensure purchases are made within budget, that the relevant stock updates are made, and that payments are made in-line with your specific routines.
You need complete visibility of information to make professional management decisions. Project Costing provides everything you need from one fully integrated module.

**Project management & costing**

Everything from project initiation to implementation, tracking and analysis, can all be carried out from this central, easy-to-use system.

As information flows into your business, it automatically updates the finance function for the most timely and accurate picture of your project-based activity.
**Project preparation**
Create multiple projects from a central point of reference. Records, projects and job bags are highly configurable and can be set up to capture the precise information you need. Each record holds detailed customer information such as start and finish dates, budgets, actual and committed costs, as well as income received.

**Actual/committed costs**
Purchase orders allocated to projects immediately update the relevant project with a committed cost. The value of the order is included in the comparison to budget. As purchase invoices are matched to the order, values are reduced and the corresponding actuals increased.

**Compulsory Costing**
Tighten your grip on projects and budgets even further. This feature allows you to apply costing controls across the entire system, in which case every selected transaction type (including sales and purchase orders, stock movements and VAT journals) must be updated to a specific project or projects.
Alternatively, you can limit Compulsory Costing to specific analysis codes. In either case, allocation is carried out on a line-by-line basis.

**Stock/project allocation**
Stock can be allocated to individual projects, and, once booked, the free stock is automatically reduced and can be included on sales invoices to the customer.

**Indirect costs**
Costs not directly related to projects, such as gas, electricity, and non-timesheet information (e.g. National Insurance and pensions), can all be quickly ‘journalled in’ from anywhere in the system, instantly updating the Nominal Ledger.

**Project tracking**
Customer billing is quick and easy using the Project Costing module. Any number of invoices can be created and configured to your precise requirements, helping you manage your budgets and cash flow. For example, part payments and staged invoices can be quickly created, based on the cost transactions posted to each job, project and cost code. For flexibility, costs can be sorted using a variety of methods (e.g. date and type) and compiled into a single invoice covering a variety of projects.

**Work in progress (WIP)**
Project Costing significantly streamlines the processes required to calculate WIP, dispensing with laborious month-end calculations.

Values are continuously re-calculated within each project, giving you a true picture of costs incurred versus recognised value. Cost transactions that cannot be invoiced are removed from work in progress, to be analysed as extra or unrecoverable costs.

**Comprehensive reports**
A range of flexible reports and summaries make it easy for you to carry out profit analysis at any time. Flexible cost centre codes provide analysis and sub-analysis as much detail as you require, using real-time data that can be used to instigate budgets for similar projects.

**Project management in Access FocalPoint**
Are you looking for a simple and cost-effective way to capture project information such as timesheets and expenses? Access FocalPoint allows transactions such as timesheets, expenses and purchases to be entered online and updated to the Project Costing module.

Configurable workflows ensure the correct information is captured and approved, while easy-to-use screens and online access speeds up the flow of information between finance staff and the rest of your business.

“Access Dimensions has its own costing feature within the financial package which is crucial for the operational side of our business – other products do not offer this level of functionality.”
Andrew Chaplin
Freedom Group

Project Costing: manage any number of projects and quickly view detailed information at-a-glance. Here, we have instant visibility of anything that will affect profitability such as unrecoverable work, WIP and invoiced values.
With a high volume of transactions, the risks of holding too much, or too little stock, can place intense pressure on your cash flow.

Inventory & stock control

Access Dimensions provides you with an easy way to optimise your stock levels, re-order product lines, manage returns and distribute deliveries in the most efficient way possible.

From pinpointing stock items to forecasting your future requirements, fulfilling sales/works orders and shifting slow-moving stock, Access Dimensions ensures you can make delivery promises you can keep.
Visibility of information
Our Stock Control module gives you instant visibility of what you’ve got, where it is, how long it’ll last and what it’s worth. Physical and free stock quantities are continually updated by supplier and customer orders, bills of materials, deliveries and returns across any number of locations.

Sub-analysis
Flexible Sub-analysis facilitates stock grouping to handle sizes, colours and any other product families of your choice, providing an intuitive system for analysis and reporting.

Real-time updates
Each time an item of stock is bought, sold or moved, Access Dimensions updates the Nominal Ledger, making it easy to maintain an accurate valuation of your stock position and track cost of sales and accruals.

Landed Costs
Access Dimensions makes it easy to track costs such as import charges, duties, transport and storage, as well as actual, standard and supplier costs. This ensures your valuations are always up to date, whether you choose First in First Out (FIFO), Weighted Average or Average Cost methods.

Traceability & stock takes
Transactions both in and out can be stored for the lifetime of your system and allocated flexibly over multiple locations, giving you full traceability. Serial numbers can be picked or allocated individually or automatically by the system. Everything you buy or sell can be identified with bar codes, flagging up where goods are damaged or stolen. We can also integrate seamlessly with handheld devices to complete a fast and efficient stock take process.

EC-SSD & Intrastat
Each stock and price record within Access Dimensions stores its own commodity code, country of origin and net mass, providing all the data required to create full Intrastat reports which can be submitted electronically to HMRC.

Stock Forecasting
This powerful module lets you easily forecast your physical stock position by day, week, month or quarter, up to 26 periods ahead. Completed forecasts can be translated directly into purchasing schedules and output to Excel for easy distribution with non-system users. By using live data held in your Access system, you can be sure your forecasts are always accurate and up-to-date.

As you play out different scenarios (e.g. new sales and purchase orders and supplier lead times) the predicted free stock is instantly re-calculated and displayed in a visual grid. Colour-coded indicators represent where stock quantities fall within your pre-defined parameters, showing your entire stock status at-a-glance.

Returns Management
This module facilitates the management of returned goods, originally purchased via Sales Order Processing (SOP). Each time a request is created, a unique authorisation number and document is generated, enabling you to log and track its progress.

Only once the customer has been given a number can they return their goods into stock. Goods can be flagged as being in quarantine until they are inspected. Once inspected, goods may be returned to stock or written off, and then a credit note for the returned items is issued, and/or replacement goods are placed on order. Alternatively the customer may also request a credit note without returning any goods.
We offer exceptional integrated solutions for small and medium-sized manufacturing organisations, covering Bill of Materials, Stock Control and Works Orders, as well as comprehensive management reporting.

Manufacturing & production

These modules in combination with a range of practical easy to use tools and set-up ‘wizards’ make the tasks of planning and controlling your production operation both easier and more efficient.

And, as with all Access solutions, your manufacturing software is tightly integrated with the core financial ledgers, providing the timely, accurate information you need to maximise your margins, even in a rapidly changing market.
Bill of Materials
See instantly whether there’s sufficient materials to build an order and then create assemblies from any stock records or price lines, referring to any text that’s been entered to describe the process. With Access Dimensions, you can easily manage complex builds by nesting one assembly within another, automatically tracking component serial numbers. Pricing of raw materials is always reflected in your margin, enabling you to closely monitor profit at all times.

Managing Works Orders
See at-a-glance which orders are awaiting components and allocate from any of your pre-defined alternatives to ensure orders aren’t held up. Instantly create back-to-back orders where you have shortages, subject to full purchase order authorisation. Using Sub-analysis, you can easily pinpoint precise stock items and allocate serial numbers for traceability. Issued stock can be reversed to ensure correct components are available for each order.

Production control
This area within Works Orders allows you to give each order a priority, ensuring that your best customers are satisfied first and rush job deadlines are met. Factory routing gives you excellent visibility of progress and early warning of bottlenecks, while estimates are created automatically and tightly tracked against cost of labour and materials as the job progresses. You can also run WIP analysis on-demand, helping you see where process improvements or pricing adjustments can be made.

Economies of scale
Access Dimensions takes account of desired stock levels and build quantities, prompting you to take advantage of economies of scale. Utilise back-flushing for any or all of the goods used within your manufacturing process and for a kanban supply system, if required. Damaged materials and unfinished goods can be written off.

To complete the process, Access Dimensions enables you to quickly create certificates of conformity which can be tailored to reflect your own quality standards, and those of your customers.

Are you a large-scale manufacturer?
If so, then consider Access Supply Chain. Ideal for larger operations with full ERP requirements, this proven solution offers capacity planning, warehousing, full traceability, load planning, pallet tracking and much more.

For detailed information, request our Access Supply Chain brochure.

Works Orders: one ‘control desk’ gives you centralised information about all your manufacturing activity. Quantities, start/end dates, routes and detailed component information is available at-a-glance, enabling fast identification of stocking issues.

“Introducing Access to our production process has given our three separate locations transparency and fluidity.”
Mark Steel
Advanced Construction Systems
The amount of data entering your company is growing every day. So how you store, access and manage this information is becoming increasingly critical.

Document management

Access Document Management (ADM) meets the challenge by providing an end-to-end process for managing your business-critical correspondence.

Using this one central system, ADM provides an easy and cost-effective way to reduce storage and paper, improve visibility and increase efficiency.

Fully integrated with Access Dimensions, ADM can also look up documents held within any Microsoft SQL-based database, giving you complete visibility of your business information.
Document Management: store and retrieve any electronic document from one central, secure location. Using web services, remote users can also view documents stored against transactions – such as this invoice – via the internet.

Flexible, secure storage
ADM supports all standard file formats, meaning you can store Word and Excel documents alongside reports, emails and images. Scanned files are fully supported, decreasing the risk of copies going missing or becoming damaged. This also allows you to dispose of original hard copies where appropriate. All your information is automatically backed up, and you can apply viewing privileges to specified users, groups or a combination of both.

Auto-filing & scanning
Our optional Network Services module enables you to process large volumes of documentation with ease. Barcodes produced in Access Dimensions can be printed and attached to documents such as purchase invoices and be left to scan. Each scanned file is deposited on a network folder, which is constantly monitored. ADM reads documents coming in and determines where they should be sent, for example, a specific user inbox or a certain folder.

Tagging tools
Once in ADM, the simple process of applying ‘tags’ make documents quick to file and easy to retrieve. Using intuitive drop-down menus, you can add tags in just a few clicks, ensuring that mandatory information is captured (e.g. company name) alongside any optional data (e.g. company geographic). A large list of default tags are supplied with each document, which can be added to and/or edited as you choose.

Document Identifiers
This function enables you to build additional information into barcodes and filenames to further refine the filing process. For example, you could apply set values to specific barcodes so that when filing purchase invoices, the system automatically populates the ‘Database Name’ field and fills out the ‘Purchase Ledger Primary’ tag.

File Prefixes
Using the File Prefix function, you can also code documents so that similar documents are automatically stored together. Similarly, adding a Prefix to barcodes will ensure that only specified barcodes are read by the system. Adding a Prefix in this way means that only the correct information is picked up, and eliminates the time-consuming process of redacting irrelevant barcode information prior to scanning.

Version Control
Using this function, you can track every change made over a document’s lifecycle and ensure that you only view and edit the most recent version. For example, users can ‘check out’ a document, make changes to it and ‘check it in’ as a new revision. Each revision can be accompanied by detailed notes.

For example, the user could record when they anticipate checking the document back in and each revision can be marked as either ‘minor’ or ‘major’ to give the user an indication about the work carried out.

Integration with Access FocalPoint
Utilising web services, authorised staff can also view and approve documents linked to projects held in Access FocalPoint. This means that instead of having to wait for a document such as a purchase invoice or contract to come into the office, staff can simply go online to view the document, then approve and/or amend it if necessary.

ADM can also incorporate a workflow using alerts, increasing collaboration and speeding up the project lifecycle.

“Currently we don’t have any visibility of invoices that arrive into our US office; Document Management will enable us to scan the information and make it available centrally, which will really speed things up.”

Helen Seaman
Rapiergroup
Workflow Forms

Tasks that would normally require intervention from your accounts department, such as requesting a new supplier code, can now be instigated by any authorised user.

By enabling users to create their own, more efficient workflows and linking them to your core processes, you can see greater return on investment in every part of your organisation.

The Workflow Forms module within Access Dimensions enables you to recreate any process electronically, using automation and alerts to speed up the capture and flow of information around your organisation.
Flexible design
Any paper docket and form in your business can be replaced with an electronic version, tailored to your chosen layout. Using Workflow Forms, labour-intensive processes such as requesting a new supplier or receiving sign-off for specific requests can be reduced to a series of defined steps, making lengthy emails, printouts and hard copies a thing of the past.

Central storage
Workflow Forms can be associated with any record within Access Dimensions – making it easy for authorised members of staff to enter and view information. Using Access FocalPoint, you can view Workflow Forms via the web, giving you instant accessibility any time, anywhere in the world.

Whatever version you choose, Workflow Forms empower your staff and release the burden on other departments – you no longer need to trawl through paperwork or phone around for information.

Workflow & authorisation
You can embed configurable rules into the system to automate the route that each Workflow Form takes around your business. This can also incorporate single or multiple-level approval routines to suit your requirements.

For example, some procedures may only require a one-step sign-off routine while others may need to go through a range of different managers and directors.

Alerts
Workflow Forms can trigger email alerts to specified users, advising when their input is required. Such a request might be to add or amend detail within the Workflow Form or to approve the information in it. You can also instigate follow-up actions by replying to the alert if appropriate, and indicate details that need further clarification by entering notes.

Save time searching
Workflow Forms bring information to you rather than than the other way around. Each user has their own ‘inbox’, meaning you can quickly see all those tasks awaiting your input and quickly action them without having to search for any additional information.

Improve data security
User permissions are easy to set within the software, giving you tight control over your business-critical information. For example, you can assign security levels to fields on a Workflow Form so they’re only visible to the appropriate users and/or department at the right stage within the workflow.

Increase visibility
Two-way integration between Workflow Forms and Access Dimensions extends visibility into new areas of your business. For example, information can be shared with customer, supplier and employee records and analysed to provide a wealth of stats and reports. Digitally stored information can be shared more effectively and staying up to date takes less time and effort.

Highly flexible
Workflow Forms are flexible and can benefit users in all areas of your business. Our consultants will work with you to create the functionality that benefits you, based on a detailed discussion of your needs.

Just some Workflow Form examples include the ability to:

- set or increase a credit limit
- create a new supplier/edit supplier details
- request a project code
- validate additional fields within a customer record (e.g. ‘directions to site’ which have been checked).

“Alerts keep approvers on their toes so they tend to approve things far more quickly... Access has definitely speeded up our internal processes.”

Sue McDonald
Competition Commission

How we do it: following a detailed needs analysis, we can design Workflow Forms to replace any of your paper-based processes. Using tools such as workflow and alerts, this function can significantly streamline the collection and analysis of generic business information.
In today’s busy world, being out of the loop just isn’t an option. You want to be connected to your business constantly, wherever you happen to be. That’s why we developed Access Mobile.

This unique platform provides powerful two-way integration between your mobile device and your Access system – so you can be at your most productive, 24:7.
My Timesheets
Using Access Mobile, it’s easy to enter and submit timesheets on the go. The intuitive interface features pre-configured lists and drop-down menus, allowing you to quickly tap in information such as dates, values and project codes. To save time, existing timesheets can be duplicated and edited to speed up repeat or similar submissions.

My Expenses
Scrollable lists and intuitive drop-down menus allow you to quickly tap in expense claims, with full detail of values, dates, project codes and additional notes. Images taken on your mobile, such as receipts and rail tickets, can also be attached to complete your submission.

My Appointments
Live integration with Access Dimensions lets you see all your upcoming appointments at-a-glance and drill-down to detailed contact information. Using the map function, you can also see how close client sites are to appointments, and view all locations within 40 miles of a specific postcode. This helps you plan journeys more effectively and maximise time out of the office.

Integration with CRM
Two-way links with CRM systems such as Access Dimensions and GoldMine Enterprise Edition give you an instant picture of all your customer and prospect information. For ease of navigation, your accounts, contacts, activities, opportunities and cases are divided into fully customisable ‘workspaces,’ each of which is fully linked so that you can quickly jump from one to another and drill down on the information you need.

These functions also integrate with the Google navigation tools, allowing you to utilise the map and journey planning software described above.

Multi-level approval workflow
Timesheets, expenses, absence and purchase requests can undergo an approval procedure, ensuring information is properly authorised before updating the Core Ledgers. Authorisation can be configured to suit your business, from simple one-step routines to complex procedures involving many members of staff.

Accounting for Carbon Emissions (ACE)
Integration with the Access Dimensions ACE functionality extends carbon reporting to your mobile.

Simply enter the required values when submitting expenses (e.g. miles travelled) and Access Mobile will automatically incorporate the corresponding ‘carbon values’ into your overall business carbon footprint.

Reports & KPIs
All the reports you’d normally get from your desktop, such as Aged Debtors and P&L, can be viewed and emailed direct from your mobile, giving you real-time, on demand access to your KPIs wherever you are.

Benefits
- Enter and approve timesheets and expenses on the go
- Approve absence and purchase requests sent to you by staff
- View and email key reports from your mobile
- Account for your business carbon emissions
- Get instant, up-to-date customer & prospect information when on the road
- Multi-level approval workflow to suit your needs.

“This app is great... I can approve various transactions directly from my iPhone ensuring an effective workflow and control in the business.”
iTunes reviewer

Access Mobile: enter/approve expenses, fill out timesheets, view KPIs and get live customer information at your fingertips. Powerful integration with your Access system means you can work more efficiently 24:7, using mobile devices you already hold such as iPhone or BlackBerry.
From invoicing renewals and managing schedules to tracking outstanding jobs and providing call support, Access Service Manager gives you total control of your service contracts.

Access Service Manager

Available as part of Access Dimensions or seamlessly integrated with your existing financial packages, this powerful solution provides excellent functionality for every area of service.

So whether you’re taking calls, allocating resources, attending sites or billing, we’ll give you the visibility you need to increase customer loyalty and attract new business.
**Call Centre**
Using this module, all your call history is easily accessed from one searchable screen so that you can provide a fast, confident service. With on-screen alerts, colour-coded priority statuses and call centre KPIs, you can continually monitor performance and drive improved response rates.

**Job Scheduling**
Maximise your resources, allocate the right engineers to jobs and tighten links between office and field. This feature lets you manage multiple calls, allocations and all day-to-day office activity from a single graphical diary.

**Workshop**
See what work’s due in, how long it’s taking and how much it’ll cost. The Workshop module provides visibility of chargeable parts, stock and labour together with detailed WIP analysis for complete clarity over your profit line.

**Parts Management**
Always have the right parts and spares within easy reach. Using this feature, you can set minimum and maximum stock levels for each van; Access Service Manager will then prompt an appropriate re-order quantity when these levels are reached and automate the purchase order to suppliers.

**Planned Preventative Maintenance**
Boost your reputation for reliability with tailored Planned Preventative Maintenance (PPM) schedules that minimise customer downtime and reduce your replacement costs. Choose from a fixed-term contract or generate schedules on a job-by-job basis and build in additional extras, such as pre-paid breakdown call-outs, with ease.

**Contract Management**
Using Service Manager, you can easily manage multiple equipment across all your different sites. Key criteria, such as cost price and warranty information, resource costs and serial numbers, can all be accessed and analysed, providing the information needed to make decisions regarding pricing, uplifts and profitability.

**Billing & Contract Renewals**
Access Service Manager lets you create flexible schedules, encompassing everything from call-out charges and labour rates down to fitting and travel so that you can account for all renewals and chargeable activity. You can easily see the renewals due in any given period and deploy renewal notices and invoices in your chosen format, ensuring no contract is overlooked or forgotten.

**Self-service**
Access Service Manager provides two-way integration with the internet, enabling engineers to retrieve and upload the latest job information 24:7 via hand-held devices or their laptops. We can also create an online portal from which customers can log new calls and check job progression – both of which speed up service levels and shift the pressure on your call centre.

**Meter Billing**
Ideal for the copier or franking machine industry, this feature enables you to track meter charges with ease. Using Access Service Manager, you can cater for unlimited number of meters whether rental or purchase models. One-time data throughput from machine to invoice makes the process fast and accurate.

**“Access Service Manager has revolutionised the way we work. I am confident that it will continue to provide impressive returns on investment for us.”**
Stephen Tate
Copy IT Digital Solutions Ltd

**Workflow in Service Manager:** this powerful solution gives you end-to-end visibility of your service obligations, providing all areas of your business with the ‘same view of the truth’ whether taking calls, attending site or invoicing customers.
Available standalone or fully integrated with SelectPay, SelectHR will support you through every aspect of the employee lifecycle.

**SelectHR**

Entirely browser-based, this .NET solution features the Microsoft 2010 Ribbon interface for ease of navigation and offers a wide choice of modules such as Learning & Development, Recruitment and Self-service.

By providing tools not only for your HR team but also for your job applicants, agencies, employees and decision-makers, SelectHR will streamline the communication, collection and analysis of information across your entire organisation.
Recruitment and Selection

Whether recruitment is largely owned by HR or devolved to managers, SelectHR makes the whole process streamlined and efficient. Workflows make vacancies quick to create and easy to track while ensuring all applicants undergo your pre-employment checks (e.g. CRB).

For successful candidates, SelectHR facilitates the onboarding process, automatically creating contracts and updating the relevant teams of new joiners.

Self-service

This is a secure, online portal where employees can view key information and carry out a wide range of tasks. For example, using Self-service, staff can view and print payslips, update their bank and address details, enter timesheets and request holiday. For security, information requiring authorisation can also undergo an approval workflow. By encouraging both staff and managers to take ownership of key tasks, Self-service is a proven way to significantly reduce duplication and paperwork within HR.

HR administration

SelectHR enables you to hold all employee information in one place. From work permits and employment checks to absence details and accident reporting, this ensures that information can be accessed quickly and easily and that you can report on any aspect of it.

Learning and Development

SelectHR brings together the areas of training, learning and development so that you can easily monitor your employees’ development and maximise your understanding of their needs. All these details are held in one place, meaning you can easily analyse costs, attendance and effectiveness while enabling staff to manage their own training activities via Self-service.

Workflow

SelectHR’s powerful workflow tools allow you to build processes into the system to cater for activities such as adding new employees, booking and approving holiday and managing appraisals. This is an excellent way of streamlining many of the paper-based HR related processes in your organisation. Many workflows are provided as standard and you have the flexibility to create/edit as required.

Document Management

This function makes it easy to store documents held against employees or any other part of the HR system. With powerful content search capabilities, it also makes it easy to locate CVs and non-employee specific documents such as policies and job descriptions.

Dashboards

Dashboards build on the many comprehensive standard reports within SelectHR, bringing you immediate, relevant information via graphical charts and graphs. Using this module, managers across your organisation can view KPIs such as turnover, headcount, absence and training online, from their desktop, in real-time – bringing speed and clarity to decision-making.

System configurability

SelectHR is fully configurable, allowing you to choose how information is presented to specific groups of users and which information they have access to. Your system comes with a huge selection of configuration tools as standard, meaning that you can be up and running very quickly yet have the ability to easily expand the system as your needs change.

Payroll integration

SelectHR offers optional integration with our payroll software, SelectPay. This allows details such as job and salary history to be shared, ensuring key employee data is entered only once. It also allows staff to view (and print) their payslips and P60s via Self-service, improving communication and freeing your payroll department from routine tasks.

“SelectHR has saved a phenomenal amount of paperwork and data entry... it has become second nature to everyone here!”

Joan Wixey
Cripps Harries Hall LLP

Instant visual impact: Dashboards in SelectHR transform raw data into easy-grasp charts and graphs. Being web-based, decision-makers can now analyse KPIs, such as headcount and absence online, wherever they happen to be.
SelectPay simplifies payroll processing and provides the in-depth analysis you need to align payment with your strategic objectives.

Regularly re-accredited to the highest standards set by HMRC, SelectPay streamlines a whole host of routine payroll activities, from adding new starters and paytypes to sending payslips and P60s via email.

To complete your solution, SelectPay also provides seamless integration with Access Dimensions and SelectHR, bringing even greater efficiency and accuracy to your payroll processing.
Payroll processing
SelectPay provides a comprehensive selection of the most commonly used paytypes and frequencies as standard. You can create and amend these as required, making it easy to handle changes to staffing levels and varying pay dates. You can also group specific records and ensure payment is made on selected dates – useful when you have a large payroll or when dealing with multiple subsidiaries.

Full integration with existing systems
Payroll data produced within applications such as timesheets, expenses, key card entry systems and spreadsheets, can all flow into SelectPay for processing without duplicate entry. Integrate with Access Dimensions and SelectPay will also automatically update the Nominal Ledger and Project Costing modules for you, making it even easier to process complex payrolls involving shift patterns and overtime.

Electronic submission
SelectPay is fully compatible with the Government Gateway, making it easy to meet HMRC guidelines on electronic submissions e.g. P11D, P14, P35, P45 (1&3) and P46 (car).

Employee records
User-friendly wizards guide you through the process of adding new starters, with tab-style record cards that allow you to quickly build up a comprehensive store of employee data. Just some of the information you can collect includes: employment history and qualifications; holiday tracking; individual pay components and an employee photograph.

Reporting & analysis
Comprehensive reports are provided as standard, and exception reports are also available to help you validate your payroll before it’s finalised. SelectPay keeps full details of all payments made, allowing you to prepare and distribute management reports at the click of a button.

Epayslips
This popular function increases efficiency and reduces paper by replacing traditional payslips with electronic ones. Tight security settings mean that epayslips can only be opened using a password known to the user and a wizard makes it easy to set up the required delivery and output options.

A final report ensures no one gets missed off, and you can easily view and re-send payslips from previous periods.

P11D processing
Company cars and loans are dealt with automatically while all other calculations and reports are easy to manage. P11D submissions can be made using traditional printed reports or online filing.

Integration with SelectHR
Seamless links with SelectPay streamline the entry and maintenance of shared information. For example, new employees entered into SelectHR join as a starter in the payroll with any changes fed through. Using SelectHR’s Self-service module, staff can also update their personal details (e.g. bank and contacts) online. All information is sent to you to approve before updating the payroll, giving you total control.

“Using SelectPay, we’ve seen a ROI of six months by simply eliminating bureau costs... and reduced payroll administration by 90%.”
Emma Best
CeX
GoldMine® CRM from FrontRange Solutions® is a world leader in the development of powerful, business and customer relationship management software.

For over a decade, we’ve implemented this market-leading solution alongside Access Dimensions into a wide range of industries and sectors.

By partnering with specialist software suppliers such as FrontRange, we can extend our solutions further, and pass on even greater benefits to you.
Campaign management

Whether you need to send an email, perform a mail merge or capture web leads, GoldMine will help make your marketing campaign a success. GoldMine offers you a centralised location to track activities and contacts associated with a marketing campaign or promotion. Marketing teams can easily define and track the status of campaign tasks and contacts to be touched. It can also be used to configure web import to capture leads visiting your web site as a result of a call to action or promotion.

Using GoldMine, it’s easy to segment your data and create action lists based on each of your ideal customer profiles. Extensive reports such as reporting cost-per-lead, cost-per-sale and conversion ratios are all produced in a few clicks, giving you the facts you need to analyse and improve performance based on past results.

Sales management

GoldMine offers you a view into your open, closed, won and lost opportunities. Each sales agent can maintain their pipeline in real time and also leverage team selling efforts since any opportunity can be assigned to multiple sales staff with specific roles to help close deals faster.

GoldMine enables sales users to follow a consistent selling practice to help improve chances of closing the deal. For example, once opportunities reach a certain stage, users have the ability to create projects converted from opportunity information. Projects can be created and tracked from any opportunity, won or open.

Account management

GoldMine captures customer, contact and prospect data, all in one convenient location. By enabling your sales, marketing and service teams to enter and view consistent data across all facets of your company, your account managers can view customer relationships, maintain account and contact history, and manage their daily activities with ease.

Sales force automation

Daily tasks such as sending emails, updating lead information and scheduling follow-ups can be automated, reducing administration and defining clear ownership over leads and projects. Powerful forecasting gives you estimated timings, values and likelihood of closure and total visibility over your sales pipeline. KPI reporting helps sales managers ensure that the team keep on top of next action dates.

Customer service

GoldMine allows you to assign, escalate and resolve customer service requests the quickest way possible. Using this centralised system, customer service staff can quickly access the problem, route the issue to the service agent who can best solve the issue, and communicate to the client so they stay informed of the service request progress.

GoldLink+

Powerful two-way integration between GoldMine and Access Dimensions empowers your salespeople to carry out tasks usually left to finance, reducing duplication and smoothing the sales order workflow. Tasks such as entering quotes, updating active contact records, controlling invoice and delivery address details and sales orders can be easily managed from within the GoldMine interface.

Moreover, powerful integration with customer records provides staff with access to full order histories, making it easy to identify sales opportunities. Stop status, stock records and credit limit warnings are also accessible at-a-glance, ensuring that you always have one eye on your profit.

CRM workflow: GoldMine lets you co-ordinate the entire marketing and sales lifecycle from one easy-to-use package. Optional integration with Access applications such as Dimensions further smooths the sales workflow, allowing sales staff to take ownership of tasks previously left to finance.