

Customer case studies

Pluss

Pluss is a social enterprise that currently helps over 2,500 people with disabilities to find a career. Founded over 40 years ago, Pluss carries out its work through a range of specialist, local employment services and through direct employment with commercial businesses across the West Country and West Yorkshire.

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Joe Wall, Financial Manager



The challenge

Joe Wall, Financial Manager, joined Pluss shortly before it made the transition from being a council department to Local Authority Controlled Company. Now largely self-funding, Pluss is part council-owned but operates on commercial lines.

At the time of joining, Pluss had recently completed an upgrade from Access Horizons to Access Dimensions. “Our bottom line is very small compared to our turnover – we target around £300,000 profit on £22m, so every error or inefficiency has an immediate impact,” says Joe. “By consolidating our company data into one real-time source of information, we had the starting point we needed to further tighten up our processes.”

Purchasing was the first area under scrutiny. “This was long and laborious,” recalls Joe. “Purchase requests were written down and then re-keyed into

the system. When goods came in, you’d need to chase a manager to sign the invoice before faxing or posting it off. This made it difficult to quickly find out who had been paid, when, how much we’d paid them and who had approved the invoice.”

The approval process itself also needed tightening up. “When you authorise a lot of invoices in one go, it’s easy for mistakes to get through,” says Joe. “We wanted to install a workflow to ensure proper authorisation by the relevant people – and cut out a load of paperwork at the same time.” On the same lines, Joe was keen to automate other paper-based processes such as requests for new stock codes, and creating new customer records.

Getting supplier invoices into Dimensions was also proving a challenge, relying on manual methods that took up valuable time and money.

Industry	Social enterprise
Geographic	Exeter (HQ) plus divisions across The West Country and West Yorkshire
Employees	550
Turnover	£24m
Solution	Access Dimensions FocalPoint ReadSoft for Invoices Access Document Management (ADM)
Modules	Core ledgers BoM Costing Stock Control Sub-analysis Asset Manager Access Office Integration (AOI) Transaction Broker Orbis SOP & Invoicing Serial Number Tracking Reporting Project Management Purchasing Workflow Forms

Finally, the company was looking for an easier way to retrieve invoices that didn't involve trawling through archives and filing cabinets.

The solution

Following detailed consultation, Joe's account manager recommended Access FocalPoint. This modular suite offers a range of flexible modules, including powerful purchasing functionality. Being web-based, it's ideal for Pluss' many site-based users, and provides a fully configurable authorisation workflow.

On top of this, Access suggested the ReadSoft scanning system, 'Documents for Invoices,' which automates the final stage of the purchasing cycle. Together, FocalPoint and ReadSoft create a seamless 'purchase-to-pay' system.

To complete the solution, the Access consultant proposed fully integrated Access Document Management (ADM). This software provides a window on all centrally scanned documents, enabling invoices (and all other) business correspondence such as graphics and emails, to be quickly viewed, retrieved and searched by any authorised user.

Finally, the Access 'Workflow Forms' module was chosen to simplify a wide range of generic tasks (such as requesting stock codes). This works by replicating existing paper-based routines in configurable electronic templates and automating the capture of specific information as the Forms travel around the business.

The implementation

Joe and the Access consultant worked closely together to design the purchase-to-pay (P2P) workflow. Because of the crossover between FocalPoint and ReadSoft, the decision was made to go live on both systems simultaneously. Although the implementation highlighted several issues, the consultant worked closely with Pluss to overcome these.

"Despite the size and scale of the implementation, our Access consultant managed each stage well.

They were also able to show me exactly how it worked, so that I could play a more hands-on role in future," says Joe.

Results

Pluss has gained instant benefits. "The combination of FocalPoint, ReadSoft and ADM has significantly reduced admin, sped up our processes and ultimately saved money; we've streamlined our accounts team by four," says Joe. In addition, Pluss has seen long-term benefits, such as:

Time and paper savings

Using FocalPoint, staff can now raise purchase requests from any one of Pluss' sites. Using workflow, requests are fed in a steady stream to approvers direct to their inbox, making the approval process far more manageable and more cost effective. "10,000 purchase requests have been made in the first year alone, the vast majority being emailed direct to our suppliers. This has saved considerable amounts of time and paper," says Joe.

OCR improves accuracy

ReadSoft's auto-match capabilities complete the workflow. Using Optical Character Recognition (OCR) technology, the system builds up a virtual memory of all invoices passing through and can match invoices straight into Dimensions.

Reduced payment risk

Together, the solution has made the process far more cost-effective – essential when you process on average 50,000+ invoices per year! The system contains all the checks and balances to ensure that purchases are fully authorised, limiting for example, the risk of double payments.

Easier dealings with suppliers

Through ADM, staff can quickly retrieve documents at a moment's notice. "Being able to see payment terms at a glance is very useful – especially when dealing with awkward suppliers during a payment run. Or internally, if someone phones to query an invoice they've seen in FocalPoint, I can quickly pull up the scanned image of the document myself. Since installing

FocalPoint, ReadSoft and ADM, I haven't needed to refer back to hard copy once. This has made it much easier to deal with anomalies and significantly improved our service levels."

Greater accuracy across the business

Using Workflow Forms, tasks that are labour-intensive and paper-based are now streamlined and electronic. "Before, it was a case of 'rubbish in, rubbish out,'" says Joe. "Now, the onus is on staff to enter information correctly; if a request for say, a new stock code, gets rejected, people only have themselves to blame!"

Easy to use, quick to train

Since installing the system, FocalPoint has gained widespread acceptance. "A lot of people who perceived a new system as being hard to use really like it; I've also been able to take control of their system remotely which has helped me quickly train a high percentage of staff."

Detailed project reporting

"We've been fans of Dimensions' reporting capabilities for many years," says Joe. "The Costing reports are sophisticated, yet easy to use, and give me, and the stakeholders, the exact level of information we need. I certainly haven't seen a comparable level of analysis in similar systems. We'd be really stuck without it!"

The future

Pluss is currently looking at SelectHR to streamline its recruitment processes and to help manage its equal opportunities policy. "By utilising Self-service, we're hoping to get the HR function away from admin and towards their core focus."

Conclusion

Joe concludes, "I'd happily recommended our Access solution for companies in the not-for-profit sector. It's a really flexible system which makes my job much easier."

Further information

For further information on this, or any other Access case studies, please telephone us on 01206 322575, email case-studies@theaccessgroup.com or, alternatively, visit www.theaccessgroup.com/downloads/case-studies.aspx.