



# Access FocalPoint



consulting | software | solutions  
[www.theaccessgroup.com](http://www.theaccessgroup.com)



01

About Access  
FocalPoint

Today's software is no longer just for your finance department. A wide range of people need to enter and approve information such as timesheets, purchase orders and expenses, subject to tight control and approval.

# System-wide benefits

Access FocalPoint is a web-based software solution designed with your whole business in mind. Through its broad range of highly flexible modules, this fully integrated, workflow-controlled solution enables your staff to interact with your business system – whenever and wherever they are.



**Integration across the Access suite**

Access FocalPoint works exclusively with our award-winning business & accounting suite, Access Dimensions. By linking your finance system to your wider organisation, you can bring greater efficiency and visibility to every activity. (Read more about our software portfolio on page 22.)

In addition, Access FocalPoint has in-built tools enabling seamless integration to our other products such as Service Manager and SelectHR. Talk to us to find out more.

**Broad functionality**

Access FocalPoint offers a broad range of modules, giving you the flexibility to expand your solution as your needs change. This brochure gives you a flavour of the features and benefits you can expect from each module within the Access FocalPoint range.

**Workflow-controlled**

Access FocalPoint is highly configurable, enabling you to match the software to your precise ways of working. For each module, you decide what information is captured and the route it takes around your business before it reaches your central system.

**View online, anytime**

In today's busy world, more of us than ever need access to our information 24:7. Access FocalPoint is a web-based solution, enabling you to interact with your organisation wherever you happen to be, whether you're using your laptop or smartphone. (Read more about Access Mobile on page 20.)

**Brand-new look & feel**

Everything about Access FocalPoint is designed to bring information to you, rather than the other way around. By utilising the latest Microsoft 'Ribbon' method of navigation, all your key tasks can be accessed in just a couple of clicks. To get a real feel for just how easy Access FocalPoint is to use, book a meeting today.

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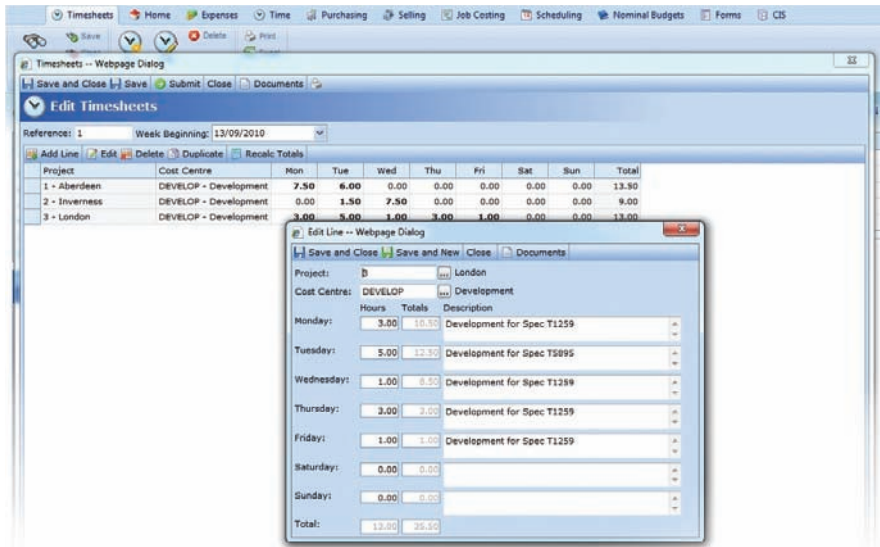


## 02 Timesheets

Our Timesheets module ensures you have a smooth process for recording and utilising your most valuable resources.

# Timesheets

Like the rest of the Access FocalPoint system, this functionality is delivered through the web. This provides both your remote and office-based staff with a simple and highly accessible time recording facility.



“Access FocalPoint has delivered pre-configured, easy-to-use timesheet and expenses entry screens...we’ve reduced manual data entry by 90 per cent.”

Sandra Richardson  
Kern

**Timesheet entry:** Access FocalPoint makes it very quick and easy for your staff to enter accurate information about time worked. This screenshot shows hours booked against a project for the week, with the running total and project detail clearly visible.

### Resource allocation

Timesheets can have pre-populated project codes allocated to them, making it easy for you to control and monitor which projects staff can book their time to.

Rules are easy to define and can be implemented within the data capture process, enforcing the type and/or quantity of hours booked by an individual. This helps ensure data accuracy and makes the process quick and easy for the end user.

### Authorisation

Authorisations can be set up in a number of ways to suit your business. For example, you could choose for projects to undergo approval on a group or departmental basis, or for smaller projects, bypass approval completely. Either way, all methods can be set up, either independently or in combination.

Using the alert functionality, approvers can be informed in real-time when authorisations are required.

### Site Timesheets

This feature makes it very easy to record multiple types of overtime (and other associated costs), and is typically used where responsibility for time recording falls to a site or department head. This allows multiple resources to be allocated to a site, with associated cost and revenue rates pre-populated to the Timesheets form for quick and easy data entry.

### Contract Timesheets

Designed for agencies, umbrella organisations and associated payroll services companies, this variant of the Timesheets module enables you to assign internal or external staff to specific contracts with specific pay/billing rates, frequencies and durations.

By only allowing assigned contracts to be specified, Contract Timesheets ensure that the right data is captured for each resource. It also allows rechargeable expenses to be captured in the same form, reducing duplication.

### Benefits

- Ensure all time is allocated to a specific project
- Bill chargeable work promptly and accurately
- Gain real-time visibility of your costs
- Improve accuracy of information
- Automatically update Timesheets with absence
- Accurately record & analyse overtime
- Support your remote and occasional users.



# 03

Expenses &  
Credit Cards

If like many businesses, you have problems getting hold of timely, accurate expenses information, then this module will make the entire process easier to manage.

## Expenses & Credit Cards

Access FocalPoint lets you embed your expenses policy within the system, using a simple online form to encourage prompt, accurate data entry and reimbursement of claims. In-built workflows ensure that the information is viewed and approved by the right people, while credit card statements can be imported electronically, reducing re-keying and errors.

**Simple and easy to use:** one form captures all the detailed Expenses information you need, from dates, rates and values to associated carbon emissions.

**“Access FocalPoint is very well designed. Whether you’re accessing a report, creating a purchase order or entering expenses, its logical layout makes tasks easy and intuitive.”**

**Denise Cardy  
Touch**

### Entering expenses

Highly flexible forms mean we can capture any type of claim relevant to your organisation, from VAT liability and project information to rates and quantities. Submissions can be set up to capture multiple dates – useful when entering repeat claims (e.g. rail journeys). The flexibility to define the posting rules for these transactions, (e.g. by employee, department and expense type), means that every expense incurred by your business is correctly analysed and posted.

### Authorisation

Authorisations can be set up in a number of ways, encompassing individuals and teams and split at detail level to allow expenses to be approved at various stages (e.g. by different project managers). Using the alert functionality, approvers can be informed in real-time, via email, when the expense is ready for authorisation. Simply click on the email and Access FocalPoint will take the approver direct to the specific claim to make their decision. Once authorised, Expenses are then available for payment in line with your standard remittance routines.

### Cash advances

This function gives you the flexibility to set up pre-payments. Cash advances can be set up in home or foreign currency, then allocated and posted according to your pre-defined business rules.

### Company credit cards

Access FocalPoint allows you to quickly upload expenses from your electronic credit card statements, significantly reducing re-keying and increasing accuracy. Once imported, Access FocalPoint automatically checks the credit card number held on the bank file against the user’s credit card number/s held in the system and assigns the person an Expenses form to review. Staff can then log in 24:7 and classify the expense type (e.g. petrol, hotel, accommodation) before submitting the claim for prompt approval and accurate reimbursement.

### Accounting for Carbon Emissions

Many businesses are now looking to measure their carbon footprint. Integration with our Accounting for Carbon Emissions (ACE) functionality makes this a simple process. When entering travel expenses, Access FocalPoint prompts you with a distance finder so that you can enter the correct values, broken down by transport type. This information is then rolled into your ACE calculation and made available for detailed analysis. This data can be stored for the next time you travel, making it very easy to enter the required carbon footprint information.

### Benefits

- Ensure all expenses are committed to a specific cost code
- Get real-time visibility of your costs
- Control spending within pre-defined limits
- Reimburse employees promptly and accurately
- Streamline processing of credit card claims
- Support your remote and occasional users
- Account for your businesses’ CO<sub>2</sub>.



## 04 Purchasing

Purchasing processes vary for each organisation – yet every business needs to order goods and services in the most efficient way possible.

# Purchasing

Access FocalPoint's Purchasing module combines web-based access and flexible workflow with excellent controls to ensure your operation runs as smoothly as possible.

| Item                               | Type | Detail                             | Analysis | Required By | Unit Cost     | Ordered      | Outstanding  | Qty Received |
|------------------------------------|------|------------------------------------|----------|-------------|---------------|--------------|--------------|--------------|
| Black Printer Cartridges for HP 65 | T    | Black Printer Cartridges for HP 65 | 2000     |             | 23.99         | 10.00        | 10.00        | 5.00         |
| Colour Cartridge for HP 650c       | T    | Colour Cartridge for HP 650c       | 2000     |             | 29.99         | 6.00         | 6.00         | 6.00         |
| Ink Jet Paper                      | T    | Ink Jet Paper                      | 2000     |             | 9.99          | 15.00        | 15.00        | 15.00        |
| Ballpoint Pens - Black             | T    | Ballpoint Pens - Black             | 2000     |             | 1.99          | 3.00         | 3.00         | 1.00         |
| Ballpoint Pens - Blue              | T    | Ballpoint Pens - Blue              | 2000     |             | 1.99          | 1.00         | 1.00         | 1.00         |
| Pencils                            | T    | Pencils                            | 2000     |             | 5.00          | 5.00         | 5.00         | 2.00         |
| Binders - Red                      | T    | Binders - Red                      | 2000     |             | 2.50          | 5.00         | 5.00         | 2.00         |
| Binders - Black                    | T    | Binders - Black                    | 2000     |             | 5.50          | 6.00         | 6.00         | 3.00         |
| A4 Paper                           | T    | A4 Paper                           | 2000     |             | 44.99         | 6.00         | 6.00         | 6.00         |
| Paperclips                         | T    | Paperclips                         | 2000     |             | 1.00          | 15.00        | 15.00        | 15.00        |
| Inkjet Labels                      | T    | Inkjet Labels                      | 2000     |             | 9.99          | 2.00         | 2.00         | 2.00         |
| <b>Total</b>                       |      |                                    |          |             | <b>136.93</b> | <b>74.00</b> | <b>74.00</b> |              |

“A purchase request would take days to reach approval stage... since installing Access FocalPoint, information is approved much more quickly.”

Sue McDonald  
Competition Commission

**Control & visibility:** being web-based, staff can log in the moment goods have been received, providing managers with a real-time view of all purchasing activity.

### Purchase Requests

Create any number of Purchase Request templates, configured to match either your centralised or distributed purchasing function. Easy-to-define rules enable you to decide which data is captured, its route through the organisation and the number of authorisations required.

### Consolidated requests

For central purchasing decisions, approved Purchase Requests can be consolidated into one or more formal purchase orders. Configurable rules allow your purchaser to easily identify elements such as preferred supplier, best price, or user-requested supplier. Purchase orders can be associated with projects and, if required, each consolidated purchase order can be limited to a single project.

### Purchase orders

In distributed purchasing models, the workflow is different and revolves around the authorisation of the Purchase Request document. The Purchasing module provides complete support for the online entry, authorisation and subsequent conversion of the Purchase Request into a formal order.

### Authorisation

Orders can be set up to receive approval at multiple levels, such as by department, project and value – including the ability to reference and check appropriate budgets. You can review the status of their Purchase Requests at any stage and be automatically alerted of any change that requires action. Once approved, purchase order documentation can be printed directly from within the software or produced within Microsoft Word, attached to your Mail Merge template and generated within Access FocalPoint.

### Goods received

In many business scenarios, the best person in the organisation to notify when goods or services have been received is the person placing the purchase request. The Purchasing module enables you to process goods received against purchase orders within the system, updating the Purchase Order module in real-time.

### Invoice Register

Inevitably, you will occasionally receive invoices that do not match any originating purchase orders. Here, an interface to the Invoice Register module enables you to view and authorise any scanned documents so that you can complete the purchasing cycle direct from Access FocalPoint.

### Benefits

- Control spending within pre-defined limits
- Reduce unauthorised payments
- Get visibility of all goods received
- Build up a detailed picture of supplier activity
- See the instant impact of your purchasing decisions
- Eliminate paper processing
- Empower staff to purchase what they need.



05 Project Management

Access FocalPoint delivers a complete project management toolkit through the web, giving your staff full project control, whether on the move or on-site.

# Project Management

The Project Management module delivers this information in a clear format designed for the occasional user, while providing the tools you demand from a fully functional project management module.

| Name                 | Budget Costs | Actual Costs | Committed Costs | Actual Sales | Committed Sales |
|----------------------|--------------|--------------|-----------------|--------------|-----------------|
| CUST001 - Customer 1 | 16,562.00    | 1,656.00     | 74,827.50       | 11,778.00    | 19,899.00       |
| EAST                 | 960.00       | 900.00       | 15,037.50       | 11,400.00    | 4,500.00        |
| 7 - Lincoln          | 960.00       | 900.00       | 15,037.50       | 11,400.00    | 4,500.00        |
| NORTH                | 15,602.00    | 756.00       | 59,490.00       | 378.00       | 15,399.00       |
| 1 - Aberdeen         | 4,123.00     | 100.00       | 90.00           | 378.00       | 5,400.00        |
| 2 - Inverness        | 11,479.00    | 656.00       | 59,400.00       | 0.00         | 9,999.00        |
| CUST002 - Customer 2 | 145,430.00   | 1,296.00     | 2,985.99        | 5,773.00     | 900.00          |
| NORTH                | 68,664.00    | 0.00         | 2,058.99        | 0.00         | 0.00            |
| 5 - Newcastle        | 68,664.00    | 0.00         | 2,058.99        | 0.00         | 0.00            |
| SOUTH                | 76,766.00    | 1,296.00     | 1,927.00        | 5,773.00     | 900.00          |
| 3 - London           | 71,710.00    | 600.00       | 975.00          | 5,622.00     | 300.00          |
| 8 - Truro            | 5,056.00     | 696.00       | 952.00          | 151.00       | 600.00          |
| CUST003 - Customer 3 | 183,421.00   | 16,517.00    | 7,224.00        | 10,970.00    | 6,670.00        |
| IRELAND              | 165,950.00   | 9,568.00     | 6,628.00        | 5,485.00     | 345.00          |
| 4 - Dublin           | 165,950.00   | 9,568.00     | 6,628.00        | 5,485.00     | 345.00          |
| WEST                 | 17,471.00    | 6,949.00     | 606.00          | 5,485.00     | 6,325.00        |
| 6 - Liverpool        | 17,471.00    | 6,949.00     | 606.00          | 5,485.00     | 6,325.00        |

**“Comprehensive project management and control functionality was crucial and Access Dimensions & FocalPoint fit the bill perfectly.”**

**Andrew Chaplin  
Freedom Group**

**Project structure:** filters within the Project Management module enable you to customise how your list of projects are displayed. This screenshot shows a detailed cost breakdown for each of your client projects, subject to granular security for each division of your business.

### Setting and monitoring budgets

Both cost and revenue budgets are catered for, with types and formats configurable within the system. Budgets can be entered directly, calculated from component elements, or even derived from associated resource plans. All budgets can be subjected to an optional sign-off procedure prior to going live in the system and once in place, profiled either weekly or monthly across the lifetime of the project.

### Milestones

Milestone types and statuses are easy to allocate, incorporating values and cost codes if required. You can also allocate milestones to other users who can automatically be alerted when their action is needed.

### WIP & income recognition

The module supports a number of flexible methods for calculating WIP, including percentage complete, cost to complete and hours to complete. You can also specify income recognition values within the software. All of these inputs can be used to automatically calculate and post month-end journals into Access Dimensions to accurately represent your organisation's financial position.

### Inventory lists

Access FocalPoint enables you to list out all the stock items needed to complete the project in question. Stock items, price list entries and one-off items can all be gathered in one easy-to-use form, which can then be sent for approval and converted into one or more Purchase Requests if required.

### Document Management

Powerful integration with Access Document Management lets you view your documents via the web. This is particularly useful for your project managers, who can view and approve project-specific information such as contracts and invoices anywhere they have an internet connection. Search tools make information quick to retrieve and any documents saved into your solution are automatically added into Access Document Management for others to view. Documents can also be created within Microsoft Word and merged with templates held in the Project Management module.

### Billing

Time and materials-based projects, as well as applications for payment, can be billed out of this module, allowing you to specify which elements of time and cost to pass on, with or without uplift. Fixed price or stage payment billing is supported, all subject to an optional approval cycle before being released to your client.

### Benefits

- Get maximum visibility of costs throughout each project
- View project structures for each division of your business
- Define visibility of project elements on a user basis
- Configure budgets to your precise needs
- Save time administering materials and labour
- Access your project documents anytime, anywhere
- Invoice your clients promptly and accurately
- Support your occasional and remote users.

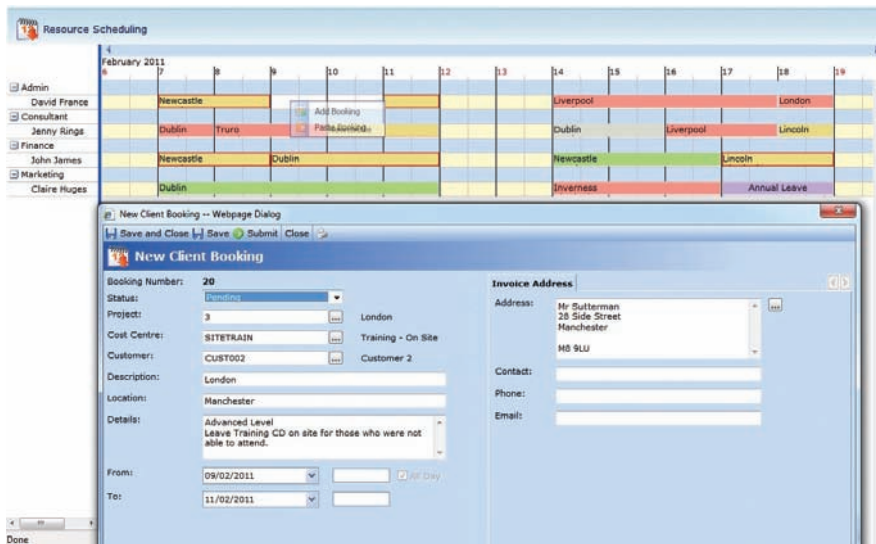


## 06 Resource Scheduler

Great organisation is key to the success of any project. Our Resource Scheduler makes it easy to keep track of your demands so that you can maximise utilisation and minimise wasted time.

# Resource Scheduler

With easy-to-use scheduling tools, web-based access and an intuitive graphical interface, you can have complete confidence in your commitments for the days, weeks and months ahead.



“Access FocalPoint has contributed to a big culture change within the workforce and opened up the opportunity for continued growth.”

Sandra Richardson  
Kern

**Bookings in Resource Scheduler:** a colour-coded calendar puts all your resources in one place, giving you full visibility of billable activity. Simple online forms enable you to take bookings in seconds, capturing detailed information about your clients’ needs and making it instantly available for your team to view.

### Resource types

Resource Scheduler is easily configured to give you visibility of the types of resources that are important to you. For example, you could use it to book employees to projects, appointments and training, or schedule rooms, vehicles and facilities across both single and multiple locations. This flexibility makes Resource Scheduler suitable for any business, regardless of sector.

### Resource allocation

Simply select an area of the Scheduler’s planning screen to add a project or task and allocate the relevant person, room or equipment. Items can be moved around the planner using ‘drag and drop’, making it easy to re-allocate resources at a moment’s notice. Each change automatically updates the rest of the system in real-time, minimising administration and keeping your team in the loop.

### Skills Matrix

This function helps you reduce waste and maximise profitability by ensuring you allocate the best skills or resources to a job. For example, when allocating people to projects, you would be able to see all the staff available along with their skills, capabilities and pay grades.

### Flexible views

Resource Scheduler can be configured to show different views for each area of your business. For example, project managers might want to group bookings by project and cost code. All activity can be seen in as much detail as you require, from top-level summary views by month and week right down to days, hours and even 15-minute intervals. Each activity type (e.g. absence, holiday, training) can be differentiated by colour, giving you an instant visual picture. Information about each project or resource is presented at summary level with all detail available in just a few clicks.

### Utilisation and chargeability

Multiple charge rates can be stored per resource to increase the flexibility of who does what. For each resource, time worked, charged and ‘free’ is clearly visible, for the week, month and year ahead. Non-chargeable time is analysed over user-definable headings such as ‘training’ and ‘management days’ as well as the usual ‘sick’ and ‘holidays’. You set the KPIs to be achieved and the system reports performance and anomalies. If required, we can also create reports that allow you to analyse chargeable and non-chargeable time, giving you a clear picture of profitability by cost code and total.

### Benefits

- Improve your planning efficiency
- Maximise utilisation rates
- Eliminate double bookings
- Match the right skills to the job
- Reduce ‘white space’
- Save time administering resources
- Analyse profitability by cost code and total
- Synchronise bookings with Microsoft Outlook.



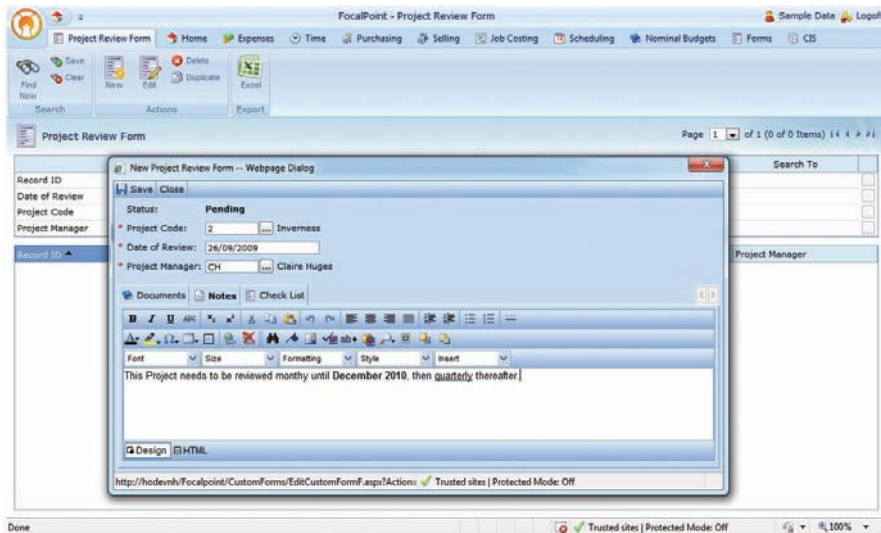
# 07

Workflow  
Forms

This highly flexible module enables you to replicate any of your paper-based forms and incorporate them into your Access FocalPoint business system.

# Workflow Forms

From holiday and company car requests to health and safety logs and training bookings, we will streamline data capture and improve visibility of information across your entire organisation.



“Our end users see Access FocalPoint as an extension of our internal system rather than a new product that they have to learn.”

Wayne Smith  
Birmingham Airport

**Streamline your activities:** using flexible layout tools, tabs, menus and labels, we can design a Workflow Form to your exact specification. The New Project Review form shown here provides a quick and easy way for you to record all projects and regularly check on their progress.

### Form design

Using flexible layout tools, tabs, menus and labels, we will create a form to your exact specification – or train you to create your own. Forms can consist of multiple pages, be linked together, and enforce the collection of mandatory data if required. A number of forms are provided as standard with the module, including the ability to create and edit a supplier record. This enables users to instigate the process online, subject to a tight approval process.

### Workflow and authorisation

With the form designed, the next step is to automate its journey around your business. This ensures all the necessary data is added and checked by the relevant person before entering your core system. Each form can incorporate as many levels of approval as required, with independent rules for the data capture and its route. To keep the process moving, an alert can be sent to approvers, via email, to let them know their input is needed.

### Web access

Online access enables any authorised user to view and submit information wherever they are – at home, on the move or at global sites. Selected information can also be made available through your company intranet and website if required.

### Boost efficiency

Providing your employees with access to Workflow Forms spreads the administrative workload across your business, empowering staff and reducing the burden on management. For example, tasks that would normally require accounts intervention or specialist knowledge, such as a request for a new supplier code or information on staff absence, can now be instigated by any authorised user.

Workflow Forms also eliminate the costs of processing and storing paper-based administration, helping your business become greener as well as more efficient.

### Increase visibility

All information entered into Workflow Forms can be analysed via a range of flexible reporting tools. For example, managers could see holiday requests outstanding online wherever they are, enabling them to keep up-to-date with far less time and effort.

This flexibility enables you to extend visibility of information to practically any area of your business, giving decision-makers the statistics they need to drive greater ROI and making ‘open book’ policies easier to deliver.

### Benefits

- Gain visibility & control over non-financial information
- Reduce paper and storage costs
- Empower employees & managers
- Get information approved more quickly
- Analyse ROI in any area of your business
- View and edit information wherever you are
- Integrate forms with other areas of your software (e.g. Expenses).

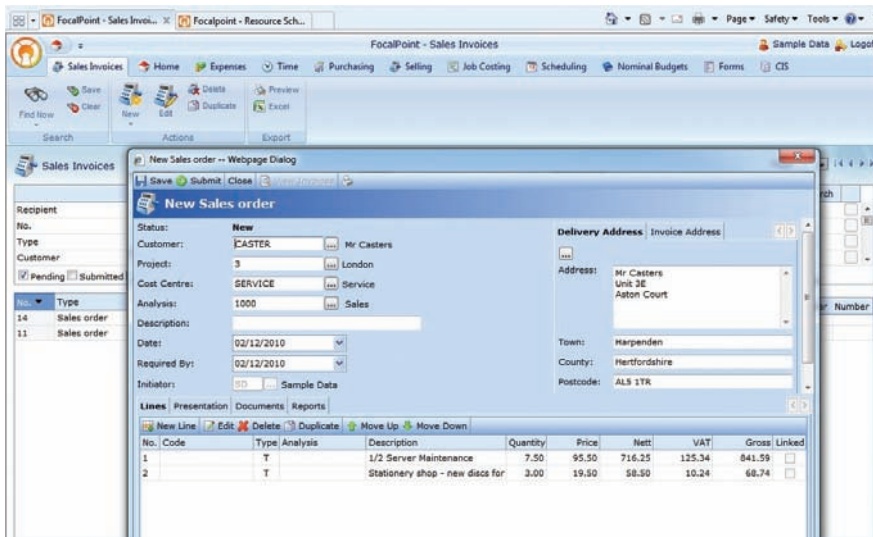


# 08 Sales & Billing

The Sales & Billing module enables you to create, raise and track quotes, estimates, credit notes and invoices with minimum fuss and maximum control.

## Sales & Billing

For those in the construction industry, Access FocalPoint includes all the required features you need to meet your obligations – whichever side of the subcontractor relationship you're on.



**Sales Order:** easy-to-use menus make it easy for your sales staff to follow common procedures when raising sales estimates and orders. Being web-based, the form can be submitted from any remote location and instantly routed to the next place in your approval workflow.

“While Access Dimensions does the financial side very well, it’s the ability to put FocalPoint functionality into our organisation that will ultimately save us time... and give us better information.”

Peter Thomson  
Jade Communications

### Sales invoicing and estimating

Sales processes differ widely between organisations and often within the business itself. Access FocalPoint enables you to build flexible controls into the system to ensure that all employees follow the same procedures when creating estimates, sales estimates and sales orders. Centralised and distributed invoicing models can both be catered for, and we can configure any number of templates to match your way of working. Each template can have independent rules for the data capture required, route through the organisation and associated authorisations.

### Authorisation

Authorisation of sales requests can be set up to multiple levels, if required. Methods supported include department, project-based, and value-based rules, including the ability to reference and check appropriate budgets. Throughout the authorisation process, individuals can review the status of their sales requests and be automatically alerted to any change that requires action. Once approved, sales order documentation can be produced either within Access FocalPoint or Access Dimensions.

### Credit notes

Credit notes can also be requested, created and approved through Access FocalPoint. As with other sales requests, they can have different processing and signoff procedures.

### Applications for payment

For companies that operate as sub-contractors, we provide a quick and easy method for raising applications for payment. The forms can be raised on a cumulative basis or not as required, following the process most suitable for the type and needs of your business. For example, they can take into account multiple discounts and retentions as well as registering certificates received.

### Subcontractor applications

The Sales & Billing module provides all the functions you need to easily accommodate your subcontractor obligations. For example, you can register applications received and issue matching certificates, if required. Retentions can also be deducted automatically, along with CIS Labour elements.

### Benefits

- Streamline your billing process
- Get paid accurately and on time
- Produce professional documentation in minutes
- Create documentation whenever and wherever you are
- Review status of sales requests at any time
- Meet your subcontractor requirements with ease.



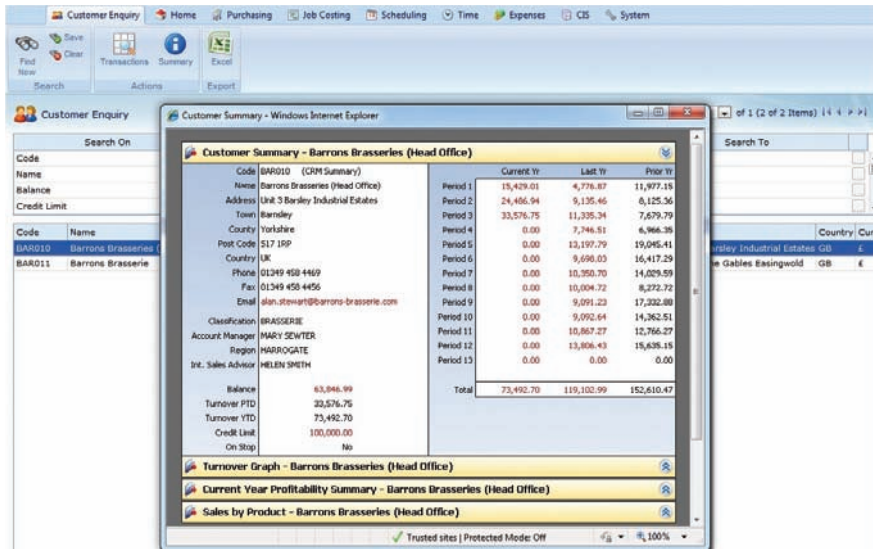
# 09

Reporting &  
Enquiries

A must for decision-makers around your business, Access FocalPoint combines the very latest reports from your business system with the accessibility of the web.

# Reporting & Enquiries

Run and export standard reports, carry out enquiries, and make your own analysis available for others to view – all from your own secure, configurable hub.



**“We are confident that our Access system will continue to support us fully as we continue our growth plans in the coming years.”**

**Andrew Chaplin  
Freedom Group**

**Information at-a-glance:** Enquiries provide key summary information at the click of a button. Access FocalPoint comes with pre-defined enquiry views as standard and you can also create your own.

## Enquiries

Get fast access to key summary information at the click of a button. Access FocalPoint comes with pre-defined Enquiry views that cover the main ledgers within Access Dimensions and you can create custom Enquiry views with ease.

Enquiries can be delivered graphically and we also offer optional integration with our Dashboard product. This lets you view pre-defined graphical KPIs in a highly visual format (e.g. graphs and charts) directly from the Enquiry window. For more information about Dashboard, please contact us for a demonstration or factsheet.

## Reporting

Any report can be added into the Reporting module and run from within Access FocalPoint. Reports can incorporate drill down, be saved locally and exported into standard formats such as Excel and PDF for straightforward distribution outside of the Reporting module.

## Homepage panels

All system users have their own Homepage. This enables people to view/approve all transactions and view KPIs in one central area,

streamlining the entire system and increasing efficiency for day-to-day tasks. For example, a manager could see their 'top 10' customers and approve purchase requests while a project manager could view WIP analysis and expenses pending.

We provide a range of views as standard, all of which can be configured to meet the different reporting requirements of people within your organisation.

## Security

Report distribution is administered securely to ensure that users may only access their allocated reports. The information is as up-to-date as the time the report is run, meaning there's no need to manually refresh your reports or send email updates.

To simplify licensing and distribution issues, we provide a range of pre-configured reports which can be easily presented to users across your organisation. Your staff can also develop their own ad-hoc reports and add them straight into Access FocalPoint.

## Benefits

- View real-time information anytime, anywhere
- Make your own reports instantly available for others to view
- Distribute reports securely across your business
- Get graphical summaries in the click of a button
- Optional Dashboard integration.



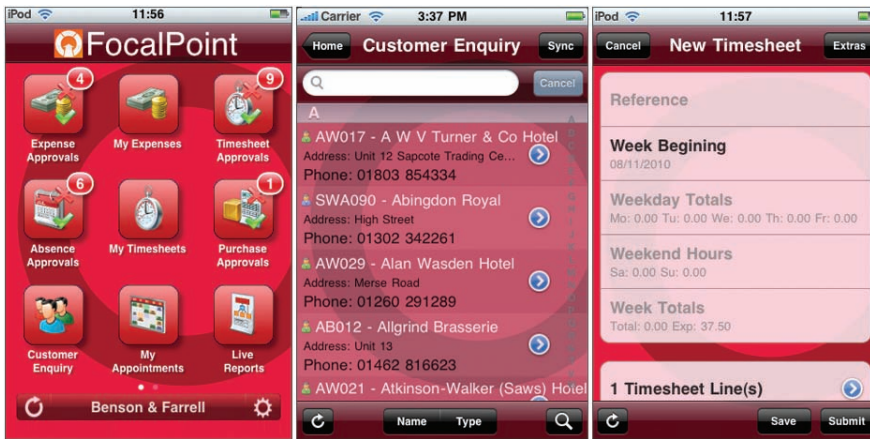
# 10

## Access Mobile

In today's busy world, being out of the loop just isn't an option. You want to be connected to your business 24:7, whether you're at home, at a customer site, in fact, wherever you happen to be.

# Access Mobile

That's why we developed Access Mobile. This unique platform enables you to interact with your Access system from the convenience of your mobile device. This section explains just some of the ways Access Mobile can turn your smartphone into an essential business tool.



“This app is great. We use Access FocalPoint project management software in our business. I can approve various transactions directly from my iPhone ensuring an effective workflow and control in the business.”

iTunes review

**More efficient planning:** Access Mobile puts live customer information such as credit limits, names and addresses at your fingertips, so there’s no need to search around for data when on the road. Enter the client’s postcode and it’ll even tell you which other sites are in close proximity so you can be first to new opportunities.

### Timesheets

View, enter and submit timesheets 24:7. Pre-configured lists capture all the required information, adding up values as you go. Existing Timesheets can also be duplicated and edited from your smartphone, making light work of repeat or similar submissions.

### Approval workflow

Items awaiting authorisation can undergo an approval workflow, set to as many levels as you need. Submissions are sent ready-formatted for managers to quickly approve (or reject) along with explanatory notes.

### Expenses

Using scrollable lists and intuitive drop-down menus, it’s easy to provide your accounts department with the exact information they need. You can also attach supporting images (e.g. receipts) to support your claim.

### Accounting for Carbon Emissions (ACE)

Integration with ACE makes it easy to contribute to your business carbon reporting when entering Expenses. Simply enter the required values into your smartphone (e.g. miles travelled) and Access FocalPoint will do the rest.

### Absence/Purchase Requests

Requests for absence and purchases can also be approved from within Access Mobile, speeding up the approval workflow.

### 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.

### Appointments

See all your upcoming appointments from the palm of your hand, then drill-down to get critical information on projects, offices and roles. You can even view the proximity of clients’ locations and colleagues’ appointments on one map, useful when planning long journeys.

### Contact management

Live integration with the Access FocalPoint business system delivers contact data (e.g. credit and payment history) to your fingertips so you’re always prepared when travelling to appointments. Enter a postcode into your smartphone and it’ll even display all customer sites within 40 miles.

### Benefits

- Keep on top of admin 24:7
- Enter and approve Timesheets and Expenses on the go
- Approve absence and Purchase Requests sent to you by staff
- Keep up-to-date with key reports & KPIs while out the office
- Accurately record carbon emissions when entering Expenses
- Get instant, up-to-date contact information when on the road
- Plan your journeys more efficiently using GPS
- Set levels of authorisation to suit your business type.



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About our  
portfolio

At Access, we believe business software should be just that – software for your whole business.

# About our portfolio

Here, you'll find just a brief overview of the other types of software that we offer. And don't forget, your Access FocalPoint solution comes with the award-winning Access Dimensions financial suite as standard.

So with the accounts taken care of, why not see what else we could offer you?

| Business efficiency          | Sales & billing | Reporting & analysis            | Purchasing                  | Project management  | Staff transactions      | Stock management  |
|------------------------------|-----------------|---------------------------------|-----------------------------|---------------------|-------------------------|-------------------|
| Document management          | SOP             | Accounting for carbon emissions | Purchase requests           | Service management  | Expenses & credit cards | Stock forecasting |
| Microsoft Office integration | Credit control  | Reporting & enquiries           | Purchase order processing   | CIS                 | Time recording          | Production        |
| CRM                          | Sales ledger    | Financial reports               | Purchase information record | Project costing     | Payroll                 | Stock control     |
|                              |                 | Corrections & auditing          | Purchase ledger             | Resource scheduling | HR                      | Distribution      |

**Cut complexity, increase visibility:** as part of our broad-ranging product portfolio, your Access FocalPoint solution can be easily extended to cover your complete range of business, administrative and financial processes.

### Financials & accounting

In addition to the 'core ledgers', **Access Dimensions** offers a wide range of optional modules. These enable you to carry out asset management, budgeting and cash flow forecasting at the click of a button – and even account for your businesses' carbon footprint through our **Accounting for Carbon Emissions (ACE)** functionality.

### Management reporting

Enjoy hassle-free reporting from your desktop or smartphone. From boardroom basics and web-based dashboards to Excel integration and graphical summaries, we free you from traditional top-down analysis and deliver KPIs in a way that's right for you.

### Cash management

Our fully integrated Credit Control module boasts powerful debt management tools to reduce debtor days and increase cash flow. And with fully automated bank reconciliation, your staff can be at their most productive every day.

### CRM

When it comes to CRM, we back **GoldMine** from FrontRange Solutions. Available in a range of editions, we've implemented GoldMine for over a decade and are FrontRange's 'CRM Partner of the Year'.

### Sales/purchase order processing (SOP/POP)

SOP ensures that sales orders are placed, validated, and delivered in-line with your exact procedures. When used with the Purchasing module in Access FocalPoint, online purchase orders are sent ready-approved into POP for simple consolidation and detailed supplier analysis.

### Payroll

HMRC-approved **SelectPay** is based on Microsoft SQL Server for scalability, security and performance. Suitable from ten to thousands of employees, SelectPay can integrate with your existing systems as well as SelectHR.

### HR

Available standalone or integrated with SelectPay, **SelectHR** is a browser-based solution offering support for every stage of the employee lifecycle. From Recruitment & Selection to Training, Absence and Self-service, SelectHR is easily configured to fit with your own ways of working.

### Stock/distribution/wholesale

From Sub-analysis and Stock Forecasting to load/pallet tracking and telesales/barcode scanner integration, our complete range of stock management tools will help boost order value, however simple or complex your operation.

### Manufacturing

**Access Supply Chain** is our fully traceable, multi-level Enterprise Resource Planning (ERP) solution. It enables you to handle all forms of manufacturing processing with equal efficiency, including make-to-order, make-to-stock, one-off and semi-continuous. Everything you need to overcome complex issues, such as over/under stocking and capacity planning, is available in one powerful and easy-to-use package.

### Service management

**Access Service Manager** will give you total control over your service contracts. From invoicing renewals and managing complex schedules to PDA integration and online customer portals, this highly configurable solution ensures tight closed-loop communication between office and field so that you can provide the very best in service.

### Get in touch

To find out more about our consulting, software and solutions, telephone us on **01206 322 575** or email **info@theaccessgroup.com**.

Alternatively, visit the Access website at **www.theaccessgroup.com**, where you can download further information such as brochures, info guides and customer case studies.

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Winner: Software Package of the Year - Accountancy Age 2010



Winner: Enterprise Accounting & Finance - Sift Media Business Software Satisfaction Awards 2010



Winner: SME Human Resources & Human Capital Management - Sift Media Business Software Satisfaction Awards 2010



Winner: Construction Accounting Software of the Year - Construction Computing Awards 2010



Winner: Green I.T. Awards - Environmental Accounting Software of the Year 2010