

Service management

Effective call management and resource scheduling, maintaining contracted service level agreements and accurate billing are all essential for outstanding service.

We automate your entire back office call centre, enabling your team to record, manage and close calls while calendar scheduling functionality makes it easy to allocate staff to jobs. Self-service portals ensure that your customers have complete visibility over call progress and job statuses.

Remote service engineers use hand held computers to download schedules and upload activity while integration with the sales ledger ensures swift, automated billing and contract renewals.

This solution is suitable for a wide range of industry sectors such as air conditioning services, print equipment, photocopier companies, IT and telephony providers and industrial plant sales.



“The key factor in choosing Access was their fully integrated service management solution. We wanted a user-friendly system that we could trust and would grow with our business.”

Stephen Tate

Copy IT Digital Solutions

Largest and longest established independent photocopier dealership servicing East Anglia

Access customers in this sector

- Copy IT Digital Solutions Ltd
- Document Express
- Activa Solutions
- Franke Coffee Systems
- Azzurri
- Sysmex
- McHale Plant Sales

Engineers & job scheduling

Each engineer has their own graphical diary so you can immediately check their availability. Colour-coding enables them to easily distinguish between different types of activities, such as breakdowns, return to fit, service jobs, meetings, events, training, holidays and sickness. Ensure that your engineers' skills are appropriately matched to on-site jobs and that your workshop has the capacity and availability for in-house repairs while ensuring that all chargeable work is accurately billed for.

Self-service

With internet access, engineers can retrieve the very latest job information 24/7, passing details back to head office via hand-held computers or their laptops.

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System-wide benefits

Customers can log calls directly through a secure website and check job progression, shifting the pressure from your call centre while enhancing the service experience.

Parts management

With multi-dimensional analysis, visual stock planning and full integration to CRM, the internet and ordering, you have instant visibility of your current and future, physical and free stock position. Landed costs, bills of materials and integration to your nominal ledger provide effortless, up-to-the-minute, valuations using FIFO, standard cost and weighted average cost methods. Transactions both in and out can be stored for the lifetime of your system and allocated flexibly over multiple warehouses and bin locations.

Serial numbers can be picked or allocated individually or automatically allocated by the system. Everything you buy or sell can be identified with bar codes and is fully traceable.

Van stock can be allocated, swapped between vans and replenished when used. Stock takes and movements in or out can be assisted by handheld devices and damaged and/or stolen goods tracked for certain transaction types. You can view and report all the complete items and spare parts that have been supplied to a customer, items that have been replaced or repaired and total spend on contract

Billing & contract renewals

A flexible rates schedule, encompassing everything from call out charges and labour rates down to fitting and travel charges enables you to account for all renewals and chargeable activity, however complex. 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.

Meter billing

Ideal for the copier or franking machine industry, this facility enables you to track meter charges with ease.

An unlimited number of meters cater for both rentals and purchase models. One-time data throughput from machine to invoice makes the process fast and accurate.

Procurement & supplier management

Negotiating prime terms, retaining control over budgets and handling your sub-contractors, can all be managed and analysed with speed and accuracy. Purchase requests can be submitted online by remote staff and consolidated centrally to increase your buying power.

In-built authorisation workflow ensures that all purchases are budgeted for and approved before hitting your invoice register or purchase ledger. Supplier records keep a lifetime history of what you've bought and when, providing full analysis by purchase category and type.

Customer relationship management (CRM)

Tight integration of selling and service management databases enables detailed customer profiling and targeted cross-selling. A single interface ensures all your customer-facing staff have all the information they need to up-sell contracts and cross-sell parts and accessories. Such information ranges from hotline calls and engineer visits to visibility of everything the customer has bought.

Back office sales staff are able to maintain regular contact with field based engineers who can then deliver a on-site customer experience. On-screen alerts, colour-coded priority statuses and call centre KPIs drive continually improved response rates.

Management reporting

From boardroom basics to business intelligence, analytics, dashboards and alerts, all your key information is presented in a range of graphical formats, delivered to your schedule and available on demand - whether you're on the internet, in the office or using your iPhone.

Now you can cut through your information overload, sifting through complex information and presenting high level critical data in a format that's right for you.

Schedules of renewals, deferred income, maintenance rosters and engineers' KPIs are all available to the managers and staff who need them. Budget and actual comparisons are readily available, month by month, year on year, for as long as you require.

Accounting for carbon emissions

Measure, manage and reduce your business carbon footprint. Working alongside carbon emission experts DEFRA and the Carbon Trust, we've created a fully integrated module that automatically creates a detailed carbon usage of your daily business activity. With standard reporting and budgeting tools, everything from utility bills to travel is easily analysed alongside the rest of your business information. From raising environmental awareness to identifying energy and cost savings, it's the smartest way to take control of your organisation's carbon footprint without extra cost or complexity.

Project management & costing

You can manage each customer as a project or have a separate project record for each major piece of work that you do for them. You can budget the different staff, resources and materials that will be deployed and then track committed and actual costs as you allocate time and use or deliver materials. Budgets are quick to create and easily flexed while our easy-to-use web-based solution provides efficient capture of project costs, timesheets and expenses for fast and accurate billing.

Document management

Every document, from board packs and purchase invoices to correspondence, engineers' site reports and customer signatures can now be scanned, indexed and filed into a space-saving electronic archive.

Digital documents generated by computer need never be printed and can be added automatically to the store, which is password-protected, easily backed up and also accessible via the web.

Workflow forms

All your business information can be captured and all your paper-based forms and documents can be duplicated in an on-screen digital form with the layout of your choice.

Workflow ensures each form takes a pre-defined path as they move between your staff and managers for extra information, authorisation and sign off. Alerts are sent by email and SMS to advise if a procedure is delayed, breached or ready to action.

Financials & accounting

Powerful reporting and drill-down, comprehensive audit trails and full multi-currency; you have instant access to all the information you need to make informed strategic decisions. Customer records keep a lifetime history of what's been bought, when, and at what price. From the financial core powering the analysis and presentation of data, to budgeting, cash flow forecasting and asset management, all your tasks are made faster, simpler and more effective.

Cash management

Cash collection and authorisation of payments is made easy while automated reconciliation makes managing large transaction volumes fast and accurate. Robust and flexible forecasting tools enable you to cope with the most demanding cash flow scenarios, pre-empting financial pitfalls and helping you to project forward balance sheets and working capital requirements.

Credit control

Fully integrated credit control empowers your staff to reduce debtor days and increase cash flow. Role-based debt allocations coupled with automated reminders ensure the right action is taken at the right time.

Payment promises are immediately visible, and debtors who breach their credit limit are tracked and analysed. While on the phone, staff can drill down to source documents such as invoices and statements and email them direct from the system for on-the-spot resolution.

HR & payroll

Data generated within our web-based timesheets and expenses forms and/or any of your third-party applications (such as key card entry systems) flows into one place for prompt processing, payment, and analysis. Fully HMRC-approved, your payroll can handle any combination of pay types and deductions.

Cut paper wastage and reduce bottlenecks with e-payslips. Detailed personnel information is enhanced with a series of easy-to-use tools which enable your HR department to manage everything from recruitment to absence tracking, analysis and appraisals.

System-wide benefits

Robust and scalable, fast and secure, there's no practical limit to the number of records and transactions you can process. Multi-language and multi-currency, your system comes with ICAEW-approved audit trails that can be kept indefinitely.

With drill-down, 360 degree data views and online access, there's only one place to look for analysis and information.

Who we are

Access will give you the advice, tools and clarity you need to make effective decisions, quickly and with certainty. As both a business-focused consultancy and a specialist software developer, we combine our innovative software with practical experience to deliver a solution that's exactly right for you and your business.

You can rely on us to provide you with a solution that's simple, proven and relevant to your company.

We have over fifteen years' experience of developing software here in the UK and our regional consultants have tailored and implemented this software all over the UK and Ireland. The expertise we've gained gives us an unbeatable ability to accurately assess your needs and deliver maximum impact with ease and confidence.

We believe your solution must be ready for the future, as well as right for today. Because your business will constantly evolve, we provide a software solution that grows with you. Our modular software covers a complete range of business, financial and administration processes and can be flexed to give you the precise view of your business that you need at any time.

Our supportive consultants combine their first-class software expertise with in-depth industry knowledge to constantly improve and simplify your business processes so that your solution delivers maximum value and a continual return on investment.

With Access, you can be sure you've got the clarity you need to reach your business goals.

Further information

For further information on Access solutions, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**