

Customer case studies

Jade Communications

Jade is one of the UK's leading Mobility Solution providers. The company specialises in the design, planning and management of a wide range of mobility solutions enabling businesses to leverage mobile voice and data capture technologies to optimise business performance, improve communications and reduce operating costs.

“We’ve reduced WIP by 60% - anything that helps our cashflow is important.”

Peter Thomson
Finance Director



The Challenge

Jade’s drive for a new system was tighter integration between the consultancy side of its business and the core financials to provide time-savings and visibility of project-related costs.

“Accurately tracking installation costs was hard work on our existing system” says Peter Thomson, Finance Director. “Project-related data was held in a customised project-management system that was neither accessible to the wider workforce nor fully integrated with the accounts. So even carrying out standard calculations, such as WIP, had to be done manually – and without a process to ensure the accuracy of the information, I didn’t have much confidence in the end result.”

This lack of integration also meant that there was no easy way to accurately track and invoice work complete. Thomson continues “We’d receive invoices from sub contractors, but because we didn’t raise purchase orders on sub contractors there was a chance that we’d end up paying more than had been agreed. That’s how you lose money.” Thomson was also keen that the new system would have a modern look and feel. “Our Sage system was outdated. We’re an IT company selling cutting-edge solutions and we wanted our back-office to be in line.”

The Search

Jade sought out information about the Access offering via their accountants, leading them to their local Access Specialist Centre.

Industry	Professional Services
Geographic	Merseyside
Employees	30
Turnover	10m
Solution	Dimensions FocalPoint
Modules	Core ledgers Purchase order processing Sales order processing & invoicing Stock control Costing/project management Serial number tracking Sub-analysis/multi-locations EC-SSD/intrastat Microsoft Office integration CIS SDK Reporting Expenses Project control Purchasing

Jade then undertook a needs analysis followed by demonstration of Access Dimensions and FocalPoint. The latter is a browser-based solution that enables many more project-based staff across the company to enter and access management information.

For Thomson, this meant that data around the areas of timesheets, expenses and purchase requests could be easily captured and routed to the accounts, removing the need to manually reconcile two sets of data. "It was the tight integration between the two products that did it for us" Thomson continues. "While Dimensions does the financial side very well, it's the ability to put the FocalPoint functionality into our organisation that will ultimately save us time... and give us better information."

Implementation

An implementation plan was drawn up, comprising installation with test data and training for users prior to Go Live. The changeover period proved a good time for a fresh look at stock coding systems and the chance to double-check actual balances, with the system up and running by the start of the new financial year as planned.

Purchase control benefits

With the solution installed, Jade's Project Coordinators are now easily able to raise purchase requisitions in FocalPoint, providing visibility that was previously absent, for example - "When the invoice arrives, we put the order number in and the system tells us what it's for.

This enables us to check the detail - if it doesn't match, then we don't pay. FocalPoint has given back control over what we're doing, and made my life a lot easier."

Improved cashflow

System integration has also freed up time in other key areas, including calculation of WIP. Thomson recalls "this could take me all day - now it takes me a couple of hours. And because the system's better, the WIP's a lot less because we're invoicing earlier. We've reduced WIP by 60% - and anything that helps our cashflow is obviously important."

A sound solution

As part of Jade's overall strategy to better integrate their financial and project based data, their solution also includes two-way linking with Microsoft Excel. Previously, Thomson would have to jump through several hoops to run, manipulate and refresh a report. Microsoft Office integration makes this a thing of the past. "This has been absolutely brilliant." Thomson says. "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. And the little things - like removing the need to manually carry out complex calculations, such as GRNI, is an accountant's dream."

Concluding

Thomson concludes. "Our Access solution continues to provide us with the information I need to inform our business decisions, and from a management information perspective, has taken a lot of the pain away."

Benefits

- **Time savings** - Integration between financials and projects removes the need for manual reconciliation, so time-consuming calculation and checks are eliminated.
- **Better decisions** - The integrity of information is always maintained - safe, secure integration with Microsoft Excel also allows figures to be worked on and exported for faster decision-making.
- **Increased efficiency** - Built-in workflow reduces the number of transactions and prevents time-consuming re-keying. For example, data relating to a purchase request is entered, and once approved, hits the accounts for processing.
- **Control over costs** - The system lets you see at a stroke what orders have been raised and whether they've been invoiced; control over process facilitates improved cashflow.
- **Ease of use** - FocalPoint is designed to be simple for non-finance users to use; Thomson says that 30 minutes training is all that's required for a new starter.
- **Low cost of ownership** - FocalPoint is available via a browser, making financial sense for companies who have a large number of users who might only need to enter timesheets, for example.

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