

Agency organisations

With our web-based agency solutions, you will get the visibility of information you need to boost client service and increase profitability. We do this by creating a single, workflow-controlled system consisting of powerful financials (Dimensions) backed by Mac-friendly project tools (FocalPoint) and to complete your solution, optional GoldMine CRM. This central system will support everyone in their key tasks, reducing administration and increasing collaboration across your business - from accounts to freelancers, studio to suppliers.

Access solutions are used by thousands of PR/Marketing/Design agencies across the UK and Ireland. This factsheet represents just a selection of the functionality they've chosen. But if you can't see what you're looking for, please get in touch - we believe we've the right solution for you.



Project control

Access Dimensions enables you to create as many projects as you need from a central reference point. Records, projects and job bags are highly configurable and can be set up to capture the precise information you require. You decide how many fields you require for storing descriptions such as names, dates, numbers and values, and which terminology you use to describe them. And with flexible cost centre structures, you can analyse and sub-analyse each project in as much detail as you need.

Project budgeting

Budgets are easy to create and can be allocated to any nominal code. Review performance against budget at any time using standard reporting tools then store multiple revisions. When creating new budgets, save time by simply retrieving existing figures and then quickly amend by percentage increments of your choice. Budgets can be set for both costs and revenue purposes.

Once in place, budgets can be profiled either weekly or monthly for maximum reporting and visibility throughout the lifetime of the project.

Obtaining sign-off for both resources and budgets is supported by in-built workflows, leaving behind a full audit trail. Signed-off projects can then be made live in the costing module, presenting you with clear, concise project information in addition to conventional P&L reporting.

Two-way integration enables you to download existing budgets and actuals into a spreadsheet or upload a new budget into the accounts.

Either way, you can leverage all the power and flexibility of the spreadsheet to fine-tune your budget before updating it to your nominal ledger. The system can track and monitor multiple budget revisions and the live link ensures that the information is always accurate.

Time recording

Timesheet functionality is delivered through the easy-to-use Access FocalPoint interface or via integration with any of your existing applications, such as key card systems or hand-held PDAs. Either way, all your critical information is transferred seamlessly into a workflow and incurs all the necessary authorisations before automatically updating the project costing system and payroll.

Timesheets can be tuned to meet the specific needs of a project or team and multiple formats can be used concurrently. Rules are easy to define and set up to streamline the data entry and data capture process or enforce the type and/or quantity/unit of time booked.

Site & contract timesheets

Specifically designed for agencies, FocalPoint's site-specific timesheets enable you to record multiple resources with associated cost and revenue rates. These values can be pre-populated for speed and accuracy and easily changed to capture anomalies. You can also assign internal or external staff to specific contracts with specific pay rates, billing rates, frequencies and durations.

Expense management

With FocalPoint, every type of real-world expense is accurately captured

and reimbursed in-line with your specific approval routines. Easy-to-use, web-enabled forms enable your staff to enter information 24/7, and for accuracy, you can classify and control what formats of expenses are allowed (e.g. VAT liability, project information, rates and quantities). Specialist expense types such as car mileage records with variable reimbursement rates can also be configured.

To save re-keying large volumes of data, credit card statements can be imported into FocalPoint and an electronic form allocated to the appropriate owner, who simply needs to classify each entry in terms of expense type/project information if applicable.

Expenses and credit card forms can be entered in either home or foreign currency values with associated exchange rates to cover international use. Using the alert functionality, your approvers are informed in real-time when validation is required, via email or SMS. Flexible posting rules ensure every transaction incurred by the business is analysed correctly before updating your system in real-time.

Authorisation & alerts

All information entered into FocalPoint can be subject to your specific authorisation procedures. The system is highly configurable to suit the scale of project that you manage and optional alerts sent via email or SMS or embedded within Outlook Today ensure that your staff know exactly when an authorisation is required.

And with our brand new App, iPhone users can now approve timesheets and expenses (and even view reports) at home or on the move.

Resource planning

FocalPoint provides a graphical Resource Scheduler, providing immediate visibility of commitments for the days, weeks and months ahead. Its graphical planner gives immediate visual access to project detail and bookings, while white space and unbilled hours have nowhere to hide. You can also schedule appropriate resources based on skills, experience and capabilities.

With total clarity of your commitments and easy-to-use scheduling tools, you can plan, prepare and juggle activity smoothly and profitably.

Procurement & supplier management

The combination of Dimensions and FocalPoint tightens the entire purchasing cycle, providing the on-demand information you need to save money.

For example, purchase requests can be submitted online by studio or site-based staff and consolidated centrally to increase your buying power. To ensure all purchases fall into your pre-defined budgets, we can map your own approval workflow into the system complete with alerting by email or SMS to capture the relevant authorisation/s.

To ensure you only pay for goods received (and further boost your reputation as a reliable supplier) off-site workers can authorise goods received via FocalPoint, speeding up the process and eliminating time-consuming trips to head office. An optional web-based invoice register provides an additional layer of security to your sign-off procedures.

And when it comes to negotiating deals or interrogating supplier performance, you have detailed analysis at your fingertips through our flexible reporting services.

About GoldMine CRM

Powerful CRM functionality is provided by GoldMine from developer FrontRange. Used by more than 130,000 companies and over 1.7 million users, GoldMine provides extensive contact and opportunity management, sales automation, marketing automation, scheduling and project management functions. Over the last ten years, Access has grown to become one of the largest GoldMine resellers in Europe.

GoldMine is available either as a standalone solution or as a fully integrated part of Access Dimensions via GoldLink+. This fully proven integration tool extends GoldMine's core capabilities, going beyond sales to maximise efficiencies in other key

operational areas such as stock and finance.

Document management

Extending from your core system, this module enables central storage of every document generated inside and outside your business, from board packs and purchase invoices to graphics, emails, and contracts. As documents enter your business, workflow removes much of the physical filing process. For example, electronic documents such as emails can be automatically filed according to pre-set rules while hard copies are quickly bulk-scanned and uploaded to the system using 'smart' barcoding technology.

For complete peace of mind, all documents are automatically backed up and fully password-protected.

And to add even further flexibility to your business processes, documents generated in FocalPoint such as purchase invoices can be viewed via a browser, enabling workers to view and approve information at home or at a client's site.

Workflow forms

This unique functionality, available in FocalPoint, enables you to replicate any business process in a form of your choice and draw the collected data into your central business system - all subject to your approval workflow.

By utilising flexible form design and innovative web technology, Workflow forms enable you to create efficiencies in areas where it's not previously been practical to do so. For example, you could provide a self-service form for employee absence, eliminating the need to re-key data between departments. A wealth of statistics and analysis is then available on-demand to authorised staff with no additional effort.

Further information

This represents just a selection of functionality suitable for businesses in your sector. For further information on the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or visit **www.theaccessgroup.com**