FMS Services Catalogue

At Access, we pride ourselves on the depth and breadth of skills across our 400 certified Professional Services employees. These Consultants, Programme Managers, Project Managers, Trainers and Solution Architects are here to provide you with the industry expertise and product best practices that help you deploy, adopt, operate and integrate our market-leading software applications - either on premise, or in the cloud. Our Professional Services teams help hundreds of clients like you, every week, to improve their productivity, increase their efficiency and ultimately provide them with the freedom to do more.

For customers who have a contract with pre-paid Annual Professional Service Days, you can redeem those days for all services except for services marked with a caret (^)

We offer a <u>free consultation service</u> (up to one hour) with one of our technical consultants to discuss your requirements. On the "Service Quote Request" page online, please request the FOC call and outline details in the "Project Details" box.

To book, please visit https://pages.theaccessgroup.com/Professional-Services.html

Day Rate Service options

Service	Description	Client Outcome	Pricing	Estimated Duration	Cost
General Remote Consultancy	1 day remote consultancy using the free consultation service to discuss requirements.	Desired outcome agreed by client and consultant ahead of the scheduled day.	Per Day	1 Day	£995
General Remote Consultancy	1/2 day remote consultancy using the free consultation service to discuss requirements.	Desired outcome agreed by client and consultant ahead of the scheduled day.	Per 1/2 Day	1/2 Day	£550
Onsite Consultancy *	1 day of onsite consultancy using the free consultation service to discuss requirements.	Desired outcome agreed by client and consultant ahead of the scheduled day.	Per Day	Varies	£995
Project Management	To manage the timings of your project, provide updates on progress and ensure everything is on track.	Professional Project Management providing clients the support they require to implement their projects successfully.	Per Day	Varies	£995
Solution Architect^	To create technical solution designs and integrations for complex, multi-product, multi-department solutions.	Minimised risk for highly complex, large scale projects.	Per Day	Varies	£1,100
Programme Management^	To drive and own the coordination of complex, multi product, multi department projects involving one or more Project Managers.	Minimised risk for highly complex, large scale projects.	Per Day	Varies	£1,100

Implementation Services

Service	Description	Client Outcome	Pricing	Estimated Duration	Cost
Upgrade to new version - FlightPath A	Upgrade of your Access Dimensions software to the latest release version for up to 3 databases. Key services delivered include upgrade scoping, test database upgrade, installation training, UAT support and live database upgrade. All services delivered remotely. (*Does not include Workflow Forms upgrade, Asset Manager upgrade, FocalPoint, server migration, Access Document Management upgrade or AOI version upgrade which are all priced separately*).	Latest Dimensions software release with all standard modules included as part of your product licence.	**Fixed Price	Typically 3 Days	£3,000
Upgrade to new version - FlightPath B	Upgrade of your Access Dimensions and FocalPoint software to latest release versions, for up to 3 databases. Key services delivered include upgrade scoping, test database upgrade, installation training, UAT support and live database upgrade. All services delivered remotely. (*Does not include Workflow Forms upgrade, Asset Manager upgrade, server migration, Access Document Management upgrade or AOI version upgrade which are all priced separately*).	Latest Dimensions and FocalPoint software releases with all standard modules as part of your product licence.	**Fixed Price	Typically 5 Days	£5,000
Upgrade to new version - FlightPath C	Upgrade of your Access Dimensions, FocalPoint and Workflow Forms software to latest release versions, for up to 3 databases. Key services delivered include upgrade scoping, test database upgrade, installation training, UAT support and live database upgrade. All services delivered remotely. (*Does not include Asset Manager upgrade, server migration, Access Document Management upgrade or AOI version upgrade which are all priced separately*).	Latest Dimensions, FocalPoint and Workflow Forms software releases with all standard modules as part of your product licence.	**Fixed Price	Typically 7 Days	£7,000
Financial Operations - Project Management	Access Financials Operations is a web-based software solution designed with your whole business in mind. The Project Management module combines web-based access and flexible workflow with excellent controls to ensure your operation runs as smoothly as possible. This allows projects to be created with an approval workflow. Tracking of Costs and Revenue is then possible on a project by project basis. Key services delivered include test database implementation, training, UAT support and go-live support. All services delivered remotely. Does not include Access Workspace Document, Purchasing or Sales (Priced separately)	Financials Operations implemented on a single Financials database. Project Creation with a workflow for approval. Project Management module with Budgets, Cost Centres and tabs for Cost Centres, Milestones, Documents, Purchases and Sales.	**Fixed Price	Typically 5 Days	£5,000
Financials - Credit Control	Our fully integrated Credit Control module 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. Key services delivered include Live database implementation and training support. All services delivered remotely. Does not include Access Office Integration capabilities (Priced separately)	Financials Credit Control implemented on a single Financials database. Credit Control Chase Debtors screen and users configured along with options around debt status and viewing.	**Fixed Price	Typically 4 Days	£3,800

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Service	Description	Client Outcome	Pricing	Estimated Duration	Cost
Additional BACS Exports	The Access FMS BACS Export Creation and/or Modification is a remote service designed for all Dimensions or Financials' clients where the Dimensions version is 2.50k or later. This will enable new BACS exports to be created based on requirements supplied by yourselves and will be implemented and tested with you to ensure the output file is one that is in the correct format and accepted by your bank for Purchase Remittance BACS payments.	Create the BACS Export file per supplied instructions from the Bank or existing BACS file Import into your database so that all users will be able to access the export format, dependant on security rights put in place by the client. Instruct on how to set defaults where applicable, either at Database Level or by Bank Account Assist in creating a test output file for you to test importing in to your banking portal	**Fixed Price	1/2 day	£475 per export
Test/Training Environment Setup	Setup and configuration of a test/training environment separate from your production environment. Depending on requirements new servers may be required.	A complete test/training environment in which you can test critical system processes without impacting your live environment.	**Fixed Price	1 Day	£1,200
SQL Server Installation	SQL server installation in preparation for a migration, upgrade or new installation of the Access software suite. This could also include a test or training installation.	Installation of SQL server and config as per Access and Microsoft best practice.	**Fixed Price	1/2 Day	£500
Dimensions / FocalPoint / AOI/inXL Installs	Installation of Access products on hosted / on premise.	Installation of Access products on hosted / on premise. Price per product.	Per Product	1/2 Day	£500
Document Layout Modifications	We will work with you to modify your existing Invoice, Credit Note, Remittance Advice and Statement layouts.	Have your layouts match your corporate image. Additional documents can also be modified for you - including Delivery Notes, Sales Orders and Purchase Orders.	**Fixed Price	1 Day	£1,000
Crystal Report Writing	Let us write your custom reports for you. Reports are an important tool for businesses to analyse data. We can help you speed up the process of accessing this key data.	Better reporting of data to reduce time spent manually creating reports.	Per Report	1 Day	£1,000
AOI Custom Views	We can create 'custom' views to be deployed via AOI (Access Office Integration).	You will be able to download and refresh data directly from your system into MS Excel. The benefit of this service enables you to create data into MS Excel in a format required via a	Per View	1 Day	£1,000
FocalPoint/FinOps Homeviews	We will create a custom homeview for your FocalPoint Home Page.	Provide your FocalPoint users with snapshot views of relevant data to help them access information quickly.	Per View	1/2 Day	£500
FocalPoint/FinOps Email Alerts	We can customise your FocalPoint email alerts with extra data to help your users respond to the reminders and alerts more quickly.	Your email alerts will contain additional custom fields and text.	Per Alert	1/2 Day	£500
Task Centre Approval Reminder Email	For existing users of Task Centre we can create an email alert which will remind users of any FocalPoint/FinOps forms awaiting their approval (Purchase Requests, Invoices, Workflow Forms, Expenses, Timesheets).	Your users will receive a daily or weekly email alert reminding them of any FocalPoint/FinOps forms awaiting their approval.	**Fixed Price	1 Day	£1,000
Payment Practices Reporting	Organisations who have to legally report publicly on their payment policies, practices and performance, can utilise our purpose built crystal report which can be added to the existing reporting suite.	Users will receive training and guidance on how we use Dimensions functionality to record the statistical information, and the on demand report that will provide the relevant legislative information.	**Fixed Price	1/2 Day	£500
UK Sage Line 50 Data Migration Service	Client provides a Sage backup, specialists extract the Sage data and transform into Access. Includes ability to convert old Sage codes into new chart of accounts.	As part of a new implementation or addition of a new company (database), customers, suppliers, nominal ledger codes are converted. Complete transactional history, with accurate allocation. The benefits of this service is that Access take on the migration for you and retain data correctly for your business as usual to continue.	**Fixed Price	2 Days	£1,500
Segregation of Duties	All organisations have information originating from outside finance, that materially impact on financial data. This information often comes in via email or via word of mouth, and often need some form of approval before the change can be made in the system. Without these being recorded in a system, it is impossible to demonstrate that the proper checks and protocols have been met	Access have created workflow-based functions that help organisations demonstrate a segregation of duties for key tasks, such as creating a new supplier or customer, changing a supplier's bank details or posting a journal. Using this toolkit, these changes can be requested by either finance or operations users, run through a straight-forward approval process before the change is made in the system. Each step in the process is stamped with the user and the date/time the change was made, maintaining a full audit trail. This has been designed to give finance better controls over important changes in the system, and reduce the risk of unauthorised tampering with finance data.	**Fixed Price	Existing WFF installation (V3.1.1+) total cost £2,000 New WFF installation (no upgrade) total cost £3,000	£2000 or £3000
Financial Operations - Purchasing	Suitability is for anyone that has Access Financials and not have Financial Operations Purchasing Module. You may have purchase order processing in financials, but will not have an audited approval process. This allows you to control spending within pre-defined limits, reduce unauthorised payments, get visibility of all goods received, build up a detailed picture of supplier activity and see the instant impact of your purchasing decisions. If you are looking for full traceability and a comprehensive audit trail for purchase approvals as well as segregation of duties, this service will support your business further and satisfy your auditors requirements.	Key services delivered include test database implementation, training, UAT support and go-live support. All services delivered remotely. Does not include Access Workspace Document or Capture (Priced separately) Financials Operations implemented on a single Financials database. Three types of Purchase Request with auditable approval processes, and Invoice approval integrated with the requisitioning and goods receipting of the purchase orders	**Fixed Price	Typically 4 Days	£4,000

Advisory and Adoption Services

Service	Description	Client Outcome	Pricing	Estimated Duration	Cost
Scoping and Requirements Definition Exercise	One of our experienced Solution Delivery Managers (SDMs) will run a requirements definition workshop to explore configuration choices and system options. These findings are then documented into a 'Confirmation of Requirements' (CoR) which is used as the blueprint for either a new implementation, system changes or a complex upgrade. The SDM will also be able to create a detailed estimated budget for the rest of the project once the scoping exercise is complete.	Confidence that you are exploring all of the configuration options and choices when you either implement a new solution, look to change your system processes or want to go through a complex upgrade. Understand the full picture of a system implementation and firm up any estimated implementation costs.	Per day	2 Days	£995

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Service	Description	Outcome	Price Type	Duration	Price
Access Digital Tax (MTD) adoption investigation	If you are currently using ADT as a 'bridging' tool and submitting your return to HMRC based on spreadsheet data this service is for you. This investigation is designed to help you understand if you can move away from the spreadsheet upload method to a true digitally connected submission. Whether you have a standard VAT requirement or are part of a specialist scheme we will discuss your process and requirements. Designed to take the on-boarding process to the next level, on this investigation day you will sit down with one of our experts to discuss the current use of your system, any VAT training needs or system changes and your use of Access Digital Tax	During this day of consultancy we will discuss Dimensions/Financials standard VAT functionality, any specific requirements or VAT schemes and what your options are for fully digital ADT adoption. We will then plan the next steps, provide a written recommendations report and estimate further costs	**Fixed Price	1 Day	£1,000
User Adoption Review	Let us do a one day onsite user adoption review to ensure your employees are getting the best outcomes from your finance system investment.	An action-focused report showing your "adoption maturity" of the solution, any quick resolutions and longer term recommendation resolutions or actions to increase your RoI (Return on Investment).	**Fixed Price	1 Day	£1,000
Year End Services	Provide Year End support, including uploading of new financial budgets. Subject to FOC discovery call.	Provide Year End support, including uploading of new financial budgets.	**Fixed Price	1 Day	£995
Sales Ledger Training	Remote sales ledger training covering the creation and editing of customers, addresses and terms. Posting sales invoices, credit notes and receipts. Cash allocations and printing customer statements.	Ideal for new users or as part of a new system implementation. Your users will understand the basic use of the sales ledger in Dimensions/Financials.	**Fixed Price	1/4 Day	£250
Purchase Ledger Training	Remote purchase ledger training covering the creation and editing of suppliers, addresses and terms. Posting purchase invoices, credit notes and performing remittance runs. Allocations and BACS exports.	Ideal for new users or as part of a new system implementation. Your users will understand the basic use of the purchase ledger in Dimensions/Financials.	**Fixed Price	1/4 Day	£250
Nominal Ledger Training	Creating and maintaining your nominal ledger codes, setting major headings and understanding the nominal ledger categories used for reporting. Posting journals and printing standard Management reports (Trial Balance, Profit & Loss, Balance Sheet).	Ideal for new users or as part of a new system implementation. Your users will understand the basic use of the nominal ledger in Dimensions/Financials.	**Fixed Price	1/4 Day	£250
Remote / Onsite * Training	Bespoke training on areas of the system that you may need to brush up on. Suitable for refresher training, advanced users and new joiners. Please use our free consultation service to discuss requirements.	Desired outcome agreed by client and consultant.	Per half day	1/2 Day	£500
Remote Handholding	Support and guidance as you process transactions, run period or year ends, update records or complete other business processes.	Desired outcome agreed by client and consultant.	Per half day	1/2 Day	£500
Remote Administrator Training	Are all users set up with the correct access levels? Are you able to set up new users? Are you able to deactivate leavers or grant additional access to others? Please use our free consultation service to discuss requirements.	Make sure you are administering your system correctly, that all users are in the correct security profiles, and that users don't have access to areas or data they shouldn't.	Per half day	1/2 Day	£500
New Features Training	Following an upgrade, learn about what new features we've added to the system to assist the changing needs of businesses. Please use our free consultation service to discuss requirements.	Users are able to see new functionality within the software demonstrated. You can then decide whether or not you want to utilise these features based on the training.	Per half day	1/2 Day	£500
AOI/InXL Training	Get the most from this important analytical tool with a training course using your Access system. Training is for 2 days.	Ensure users are able to use AOI and InXL to report against their Access finance database in an efficient manner.	**Fixed Price	2 Days	£2,000
Crystal Reports Training	Get the most from this report writing tool with a training course using your Access system. Customers must purchase a copy of Crystal Reports Developer. Training is for 2 days.	Ensure users are able to write simple Crystal reports, modify existing reports and document layouts. This saves you money longer term in requesting Crystal Report changes, and allows self service.	**Fixed Price	2 Days	£2,000

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Mission Critical Services

Service	Description	Customer Outcome	Pricing	Estimated Duration	Cost
Infrastructure Review	Review of SQL server, databases and IIS setup. This will include a report that will advise best practices and also recommendations for your setup and config.	Confidence that your infrastructure is configured correctly to optimise your Access software. The benefits include improvements to system efficiency, data storage and speed.	**Fixed Price	1 Day	£1,000
Software & Data Health Check	We will review your software setup and check data integrity. We then provide a report that will contain the results and recommendations. Up to 3 databases.	Ensure that your system is configured correctly. Check that your data is correct. The benefits include improvements to system efficiency, data storage and a review of backup, Disaster recovery/restore procedures and policies.	**Fixed Price	1 Day	£1,000

Development and Integration Services - For more detailed services please see the Development and Integration for financial systems catalogue: https://www.theaccessgroup.com/product-services-marketplace/

Service	Description	Client Outcome	Pricing	Estimated Duration	Cost
Integration and Automation^	Using our suite of business process automation and integration tools we can help you Integrate your third party or in-house systems with Dimensions/Financials. Our experts will design and build the solution to your requirements, integrating with a range of technologies including, but not limited to, CSV, Excel, Flat Files and Web Services. Each integration can be delivered as continuous, scheduled or on-demand solution and can be installed either on premise or within our cloud environment.	Streamline your processes to save time, money and remove the need to re-key data, while reducing errors and releasing you and your employees to focus on what's important. Whether its Customers from SalesForce, Orders from Magento or feeding data to your internal forecasting system, we can help you realise the benefits of having all your systems working together.	Per Day	Varies	£1,200
Bespoke Features/User Interface^	Have you ever thought "If only my system did this"? We can tailor your Dimensions system to fit your specific business processes. Whether it is adding extra fields or searches to support a specific process, or creating an entirely new business workflow, we can work with you to design, build and implement solutions to help you unlock new opportunities and drive your business forward. (Not *available with Access Financials*).	By optimising your processes and systems, and tailoring them to your needs, we can help you save time and money, and free you and your employees to focus on what's important, giving your business the space to grow.	Per Day	Varies	£1,200
Workflow Form Development^	Do you have business critical processes that are still managed using Excel spreadsheets, legacy software or paper based processes? Using our cutting-edge business process development tool Workflow Forms, we can design, build and implement new business workflows and replace your legacy processes. Workflow Forms can be embedded within Dimensions/Financials allowing access through your existing applications and via the web.	We have helped hundreds of our clients by transforming their legacy processes into modern, robust, secure, supportable and centralised solutions. Reducing costs and time, improving auditing, allowing electronic approval and email alerts.	Per Day	Varies	£1,200
Dimensions API Installation and Training^	The Dimensions Web Services API and SQL API modules provide a secure gateway for your internal or third party development teams to integrate with Access Dimensions. We can provide installation and bespoke training to help your developers get up to speed as quickly as possible. (Not available with Access Financials) .	The Dimensions Web Services and SQL APIs supply a large range of functionality that can be challenging for new developers to grasp. We can help support and guide them so that you can get the solution that you expect when you expect it.	Per Day	Varies	£1,200

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