



Access Recruitment CRM 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 customers like you, every week, to improve their productivity, increase their efficiency and ultimately provide them with the freedom to do more.

Day Rate Service options

Service	Description	Customer Outcome	Pricing
Developer Consultancy	Up to 6.5 hours consultancy per day, delivered remotely or onsite to be agreed ahead of work commencing	Desired outcome agreed by client and consultant ahead of the scheduled day	Per Day
Remote/Telephone Consultancy	Up to 3 hours remote consultancy	Desired outcome agreed by client and consultant ahead of the scheduled day	Per Day
Business Analyst	A Business Analyst will work with you to draw up a specification for customisation or integration, and manage the implementation of the work including QA and handover into live CRM	Required for all customisation requests to ensure a smooth delivery.	Per Day

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Implementation Services

Service	Description	Customer Outcome	Pricing
Start Up Flightpath	Predefined delivery methodology. Spin up of your database, workspace and online learning courses to get you up and running.	Pre-set project plan with premeasured timescales	Fixed Price
Flightpath A	Predefined delivery methodology. Spin up of your database, workspace and online learning courses to get you up and running. 4 Onboarding sessions delivered remotely by an Onboarding Consultant and a basic data import.	Pre-set project plan with premeasured timescales	Fixed Price
Flightpath B	Predefined delivery methodology. Spin up of your database, workspace and online learning courses to get you up and running. 6 Onboarding sessions delivered remotely by an Onboarding Consultant and a comprehensive test and live data import.	Pre-set project plan with premeasured timescales	Fixed Price
Flightpath C	Predefined delivery methodology. Spin up of your database, workspace and online learning courses to get you up and running. 8 Onboarding sessions delivered remotely by an Onboarding Consultant and a comprehensive test and live data import.	Pre-set project plan with premeasured timescales	Fixed Price
Custom Data Import	Import data to RCRM from CSV or backup from another system. This needs to be reviewed on a case by case basis and quote given.	Import new or historic data for use with RCRM	POA
Additional Onboarding Consultancy	Additional time with your onboarding consultant.	Additional consultancy delivered on a predefined set of criteria pre-selected from a list of available items.	Per Hour
Project Management	Your assigned Project Manager will undertake project planning, provide updates on progress made and deliver the project to time, budget and scope.	Professional project management providing clients with the support they require to implement their projects successfully	Per Day
Workspace Setup	RCRM Onboarding consultancy to implement Workspace for your users	Our consultant will ensure you have the support needed to take your workspace system live	Per day
Inbound and outbound SMS Installation	Install Inbound and outbound SMS webservice	Centrally stored SMS for increased access to SMS data within notes.	Fixed Price
Configuration required for Pay and Bill Managed services integration	Configuration services required to integrate your ARCRM system with Access Pay and Bill Managed Services.	ARCRM and Pay and Bill managed services connected in order for the client to push through their data to our managed	Fixed Price

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Advisory and Adoption Services

Service	Description	Customer Outcome	Pricing
User Training 1-1 via Telephone	Block of hours which can be booked with our training team for user support, delivered via an online conference. Sessions up to 2 hours at a time with up to 2 people and one trainer. Individual hours can also be purchased.	Get user support to help your agency make marginal gains on improving your use of RCRM	Fixed Price
User Training (Client Site)	Customised or pre defined training courses delivered in our client offices (Up to 8 people)	Get your workforce working smarter and more efficiently without the need to leave the office.	Per Day
User Training (Access Office)	Customised or pre defined training courses delivered in our Training Centre (Up to 8 people)	Get your workforce working smarter and more efficiently without the need to leave the office.	Per Day
User Training - E-Learning	Online learning available on demand for new, advanced and admin users.	Get your workforce working smarter and more efficiently in their own time - provided on demand.	Fixed Price
User Training - Custom E-Learning	As above E-Learning however we can tailor the package offered to extend or change the content offered.	Full classroom training at a cost effective per user price.	Per Day
CSM - User Adoption Review	Let us do an onsite user adoption review to ensure your employees are all getting the best outcomes from your Access RCRM investments	This is a great option if you are new to RCRM and need assistance with setting up RCRM and would like help adopting the RCRM recruitment software	Per Day
CSM - Health Checks	This is an excellent option if you have been using RCRM for a while and are interested in discovering quick wins, new faster ways of working and best practice within RCRM.	This is an excellent option if you have been using RCRM for a while and are interested in discovering quick wins, new faster ways of working and best practice within RCRM. A follow up	Per Day
CSM - Workshops	Tailored workshops designed by you and our CSM in order to build an efficient day to maximise training and implementation of discoveries during the Health check	Tailored workshops designed by you and our CSM in order to build an efficient day/s to maximise training and/or implementation of discoveries during the Health check	Per Day
CSM - Workflow Process Analysis	Our CSM will sit down with you and your key users/system owners and run through your candidate journey, client journey and recruitment processes from start to finish in order to offer improved ways of working and time saving tips. As well as discovering ways RCRM can speed up/automate processes	Our CSM will sit down with you and key users/system owners and run through your candidate Journey, client Journey and recruitment processes from start to finish in order to offer improved ways of working and time saving tips. As well as discovering ways RCRM can speed up/automate processes. A	Per Day

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Mission Critical Services

Service	Description	Customer Outcome	Pricing
SQL Auditing	Auditing on any mission critical data within RCRM. We would scope with you what this data is and cost out a project to provide auditing and reporting to review the data.	Control to see who has changed what data and, if required, recover previously saved information in a field or series of fields.	Fixed Price
Client SSL Renewal	Renewal of client funded SSL Certificate	We will change your SSL cert for you	Fixed Price

Development and Integration Services Options

Service	Description	Customer Outcome	Pricing
Integration to 3rd Party applications	Scope and integrate third party application for data flow or to use third party software in application	Reduce data entry in multiple systems	Per Day
Custom Report	Fully customised report columns with your chosen columns	Fully customised report to provide all features needed to have the most impact on process.	Fixed Cost
Customised Invoices	Customise your invoice templates beyond the capability of the editor within the RCRM.	Use our branded invoices in RCRM to improve your invoicing workflow and include any further critical invoice detail to secure a faster payment from your customers.	Fixed Cost
Workflow Business Rules	We can build a customised workflow for your business	All a third party needs to integrate with Access RCRM.	Fixed Cost
API	Integrate your software so that it can be used in conjunction with RCRM data.	All a third party needs to integrate with Access RCRM.	Fixed Cost
Workspace Apps	We can build a workspace app specifically to your needs, either standalone or connected to your Access software. If you have a business requirement for an app then please get in touch for a free consultation.	A tailored workspace app to provide a solution to your business requirement.	Fixed Cost
RCRM Web Portal Development	We can customise the workflow of the Candidate, Client and Registration form to help make your processes more efficient.	Increased website security for your client and candidate portal applications.	POA
Timesheet Image Plugin	Provides a professional white labelled PDF copy of the online timesheet with date/time stamp of who logged into the portal to securely approve the timesheet. This can be attached to the client invoice using the PDF invoice plugin.	Ensure your clients have all the detail needed to pay their invoice fast and without dispute.	Fixed Cost
Custom Data Import	Import data to RCRM from CSV or backup from another system. This needs to be reviewed on a case by case basis and quote given.	Import new or historic data for use with RCRM	POA
Candidate Portal GDPR Tick Boxes	If you have the Candidate Portal we can extend it with another button for GDPR tick boxes which will update the GDPR tab in RCRM real time.	Collect real time GDPR preferences to help you remain compliant with an efficient self service approach.	Fixed Cost
Data Export	Report custom built with your chosen columns	Quick and cost effective report including your chosen columns.	Fixed Cost

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Data Export to CSV File

Clients and Contacts	Exporting client and contact data to CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Applicants	Exporting applicant data to CSV Format, this also includes CV documents exported to windows folder	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Jobs	Exporting job data to CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Placements	Exporting placement data to CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Notebooks	Exporting notebook data to CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Notebook Attachments	Exporting notebook attachments to a windows folder	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Stored Documents	Exporting stored, job and placement documents to windows folder	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Users	Exporting users list data to CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Attributes	Exporting attributes data into CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Work History	Exporting work history data into CSV format	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Applicant Actions	Exporting applicant action data to a CSV file	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Estimate
Payroll / Invoicing Exports			
Custom Export to Sage	Modifying either Sage or Merit standard exports which are found in the RCRM Store.	A custom export to allow our client to export and import to sage with the click of a button.	Estimate
Xero Sales Invoice Export	Standard Export to Xero browser based invoicing. This includes installation and a handover from one of our consultants to get you going.	Export to Excel CSV file with a click of a button and import the data into the Xero system.	Fixed Cost
Umbrella Company Export	Exporting applicant action data to a CSV file	At Access we know our data well. We can export data into a specific format to make it easily compatible with other	Fixed Cost
Third Party Export	Export in format of third party product. We can scope and build based on requirement.	Integrate with another provider not on the list.	Per Day

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