

Professional services organisations

Efficient capture of time, expenses and project information from remote and office-based staff whilst tracking profitability and responding flexibly to clients' needs can all be achieved with ease.

Flexible online project management tools are designed to capture all your project-related costs and make up-to-the-minute project and client information available to everyone with the authorisation to review. Your client billing and income recognition process is entirely automated with detailed WIP and cost-to-complete analysis available on demand.

This solution is ideal for all professional service organisations, from architects and surveyors to advertising and design agencies, as well as the majority of consultancy firms.



“There were plenty of solutions out there that could do the job adequately but the Access solution was the only one that fitted our business needs exactly.”

**Denise Cardy
Touch**

International provider of brand experience solutions to Microsoft, Starbucks and Boeing

Access customers in this sector

- Ogilvy & Mather Advertising
- S & P Architects
- Jade Communications
- Kern
- Touch

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.

Budget and actual comparisons are readily available, month by month, year on year, for as long as you require.

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.

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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

Whether you're responsible for scheduling resources or assigning costs, managing income recognition or analysing WIP, you can track every cost at every stage of your project for total clarity on your financial position. 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.

Time recording

Whatever your method for capturing time-based activity, we have a timesheet to fit. Data can be fed into hand-held PDAs, entered online, into a spreadsheet or any industry-specific application and transferred seamlessly into a workflow, incurring all the necessary checks and 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

If an individual has responsibility for time recording of multiple resources we have a specific site timesheet feature to accommodate this. Multiple resources with associated cost and revenue rates can be pre-populated to the timesheet while retaining flexibility for anomalies.

Contract timesheets are specifically designed for agencies, umbrella organisations and associated payroll services companies. This variant enables you to assign internal or external staff to specific contracts with specific pay rates, billing rates, frequencies and durations. We can also integrate with your existing key card entry systems and spreadsheets.

Expense management

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 large volumes of expenses data, such as credit card statements, enter your approval workflow without any re-keying.

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

We can configure authorisation procedures for timesheets and expense claims to suit your business and the various sizes of project that you manage. For example, you may decide that small projects need one level of authorisation while others need to be routed through various managers and departments. Optional alerts sent via email or SMS or embedded within Outlook Today ensure that your staff know exactly when an authorisation is required. The alert takes you directly to the specific timesheet or expense for a quick and effective decision to be made.

Resource planning

View your future commitments for the days, weeks and months ahead and schedule appropriate resources based on skills, experience and capabilities. A graphical planner gives immediate visual access to project detail and bookings while white space and unbilled hours have nowhere to hide. With total clarity of your commitments and easy-to-use booking and scheduling tools, you can plan, prepare and juggle activity smoothly and profitably.

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.

Document management

Every document, from board packs and purchase invoices to engagement letters, project completion documents, graphics and correspondence, 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.

Customer relationship management (CRM)

Manage the full prospect/customer lifecycle, through effective marketing campaigns and account management. Tight integration of CRM with all your other business and financial applications enables detailed customer profiling and targeted cross-selling. Visibility of all customer-related data through a single interface combines key information to ensure all your customer-facing staff have all the information they need.

Invoicing

Full visibility of your order book, resource availability, special terms and customer history speeds entry. Template-invoices and repeat billing tools help your staff add value through up-selling and cross-selling your services.

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.

Financials & accounting

Powerful reporting and drill-down, comprehensive audit trails and full multi-currency; you have instant access to 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.

HR & payroll

Integration with timesheets, expenses and third-party applications such as key card entry systems bring timely, accurate data into one place for prompt processing. 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.

Further information

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