



Best value business solutions for
every size of company



Access Integrated CRM

Powerful Customer Relationship Management

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Access Integrated CRM

For sales and marketing driven organisations with complex accounting needs, Access Integrated CRM delivers comprehensive customer relationship management teamed with award-winning business software.

This single, indispensable solution enables you to streamline your sales and marketing activity and improve business-wide productivity, empowering you to meet today's challenges and face those of tomorrow.

About Access

Access Accounting is the market leading provider of Microsoft SQL Server based business and accounting solutions. These are designed, developed and supported exclusively in the UK and are in use by over 10,000 companies nationwide.

For over 15 years, Access has been dedicated to the supply of solutions that help businesses achieve success. With over 20% of staff time being invested in research and development each year, Access solutions are constantly at the cutting edge of technology.

The company has been awarded multiple accolades for its solutions and services. Access Dimensions was recently voted best mid-range accounting software of the year 2005/6 by Accountancy Age.



Key Benefits

Why Access Integrated CRM?

Access Integrated CRM teams all the benefits of a stand-alone CRM system with the significant advantage of complete integration with your business and accounting information.

The companies that are successfully growing their business in today's modern commercial world are those who consistently take advantage of the very latest technology and systems. Access Integrated CRM will help you to establish a truly customer-centric organisation in which all your staff have the same clear, up-to-date view of customer information, marketing (both to prospects and existing customers), and sales pipeline activity.

From gathering the initial contact information for a company and making your first sale, right through

to establishing a loyal customer base, Access Integrated CRM provides all the tools you need in order to find customers and develop excellent long term commercial relationships with them. Access solutions are designed to grow with your business, so that no matter how successful you are, you can continue to reap the benefits of this fully integrated CRM solution.

As well as the clear return on investment delivered by finding more prospects, converting more of these to customers, and maintaining a smooth company-wide communication with your existing customers, Access Integrated CRM also adds significant value by providing information that enables your organisation to continually improve how things are done.

Business Benefits Summary

Access Integrated CRM gives you the power to:

1. Develop a marketing and sales lead organisation that will drive revenue and opportunity for your company. In this way you can establish the foundations for sustained profitable growth.
2. Support the development of customer-focused business processes throughout the organisation.
3. Manage today's challenges, and be ready for the challenges of tomorrow.
4. Build in the ability to change your business – either by evolution or step-change, whilst remaining in complete control of your most valuable asset – your revenue stream.

Key Benefits

Choose Access Integrated CRM for measurable, business-wide benefits

7 Key Business Benefits

Centralised Information

A single centralised database provides you with up-to-date information in the format you need. Full drill-down facilities allow authorised staff to easily view previous orders, invoices, payments and quotes. Maintain just one set of records and contact details and enjoy the benefits of this common information across your entire company, from field based staff, to the warehouse and from finance to account managers. Working with the correct information improves efficiency and staff morale.

Automated Marketing

The ability to automate your marketing activity brings a step change in the amount of ground you can cover in the search for prospective new customers. Feeding high quality sales leads into the sales pipeline is an essential facet of all successful businesses. With Access Integrated CRM, you can easily set up and execute marketing campaigns – and there is no limit to how many campaigns you can run at any time. This impressive facility empowers both marketing teams and non-marketing professionals alike to plan and perform marketing activities as they desire.

Accurate Tracking of all Sales Leads

You can easily track all sales leads through the entire cycle to ensure that no opportunities are missed. This is especially important when sales staff are handling a large number of leads. By empowering sales managers to ensure that not just the 'low hanging fruit' is brought home, you can attain maximum sales revenues from your enquiries.

Solid Sales Forecasting

Accurate revenue forecasts are an essential part of the sales management process. With Access Integrated CRM you can view the sales pipeline by area, salesperson, product type, or any other criteria that you choose. These views enable clear understanding of successes as well as those areas requiring attention, and from this information you can make any necessary adjustments to your sales strategy.

Scalability

Access Integrated CRM is designed to grow with your business. Utilising the industry-standard Microsoft SQL Server database, there are no practical limits to the amount of data that can be stored without losing processing speed. Whether your business becomes larger, more diverse or more complex, Access can grow with you.

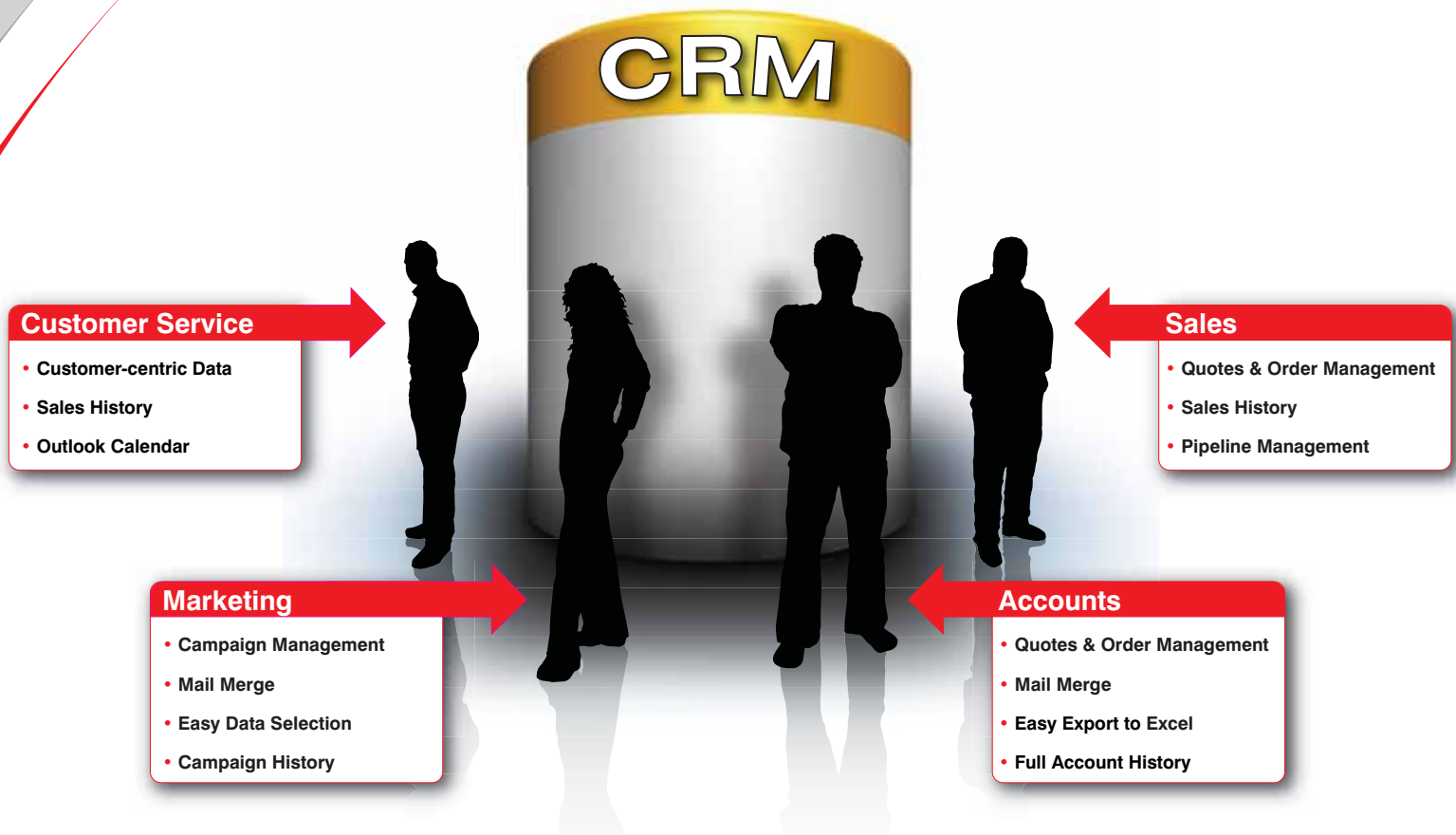
Role-based Flexibility

For a number of years, Access solutions have been configurable to meet the needs of individual job roles. This maximises the benefits that the solution brings, ensuring every user across the business is comfortable with the software. Each Access solution is customisable per user, both in terms of the toolbar options that are displayed, and the appearance of the screens. Business terminology or national language can also be defined on a user by user basis. This flexibility enables every staff member to work with the screen layouts and field labels that suit them.

Integration

With the open architecture of a Microsoft SQL Server database, Access Integrated CRM can communicate with legacy database applications, as well as with other industry-standard systems. In this way even your specialised software can exchange information with Access in real time – avoiding synchronisation issues. Furthermore, Access Integrated CRM has one of the best available levels of integration with Microsoft Excel, Word and Outlook, enabling staff to work in the applications with which they are most comfortable.

Functionality



Functionality

Overview of Access Integrated CRM

Access Integrated CRM delivers first-class functionality at a price point that will generate excellent return on investment. The lists below summarise the available functionality, which is further explained in the pages that follow.

Customer & Prospect Management

Customer & Prospect Information

- Centralised information database
- Account and contact management
- Any number of contacts per company record
- Flag contacts that are no longer at the company
- Attach associated documents
- Smart Tag technology gives comprehensive view of customer details

Customisability

- Screens configurable by individual user
- Field-level security profiles
- Set up your own choice of search criteria to analyse prospect and customer data

Maximising Productivity

- Rapid search on any field
- Task management and synchronisation with Microsoft Outlook, complete with automated reminders
- Territory management facility
- Computer Telephony Integration
- Direct links to Microsoft Office applications
- One click conversion when prospect becomes a customer
- One click conversion of estimate to live sales order

See pages 10 – 12 for further information

Marketing & Campaign Management

Creating and Deploying Campaigns

- Rapid campaign set-up
- Pull out campaign target data quickly and easily
- Personalise content and subject of mailings with any information from your database
- Automated generation of letters and emails
- Deployment via mail merge, other database tools or comma separated variable files

Tracking and Analysing Campaigns

- Record and analyse campaign responses
- In-depth analysis of marketing activity with Costing module integration
- Comprehensive campaign records with up-to-date campaign status details
- Fully accessible campaign history for every prospect and customer
- Assign lead sources to enable accurate success measurement
- Create campaign follow-up lists
- Track every interaction, including a full record of every conversation

See pages 13 – 15 for further information

Sales & Pipeline Management

The Sales Process

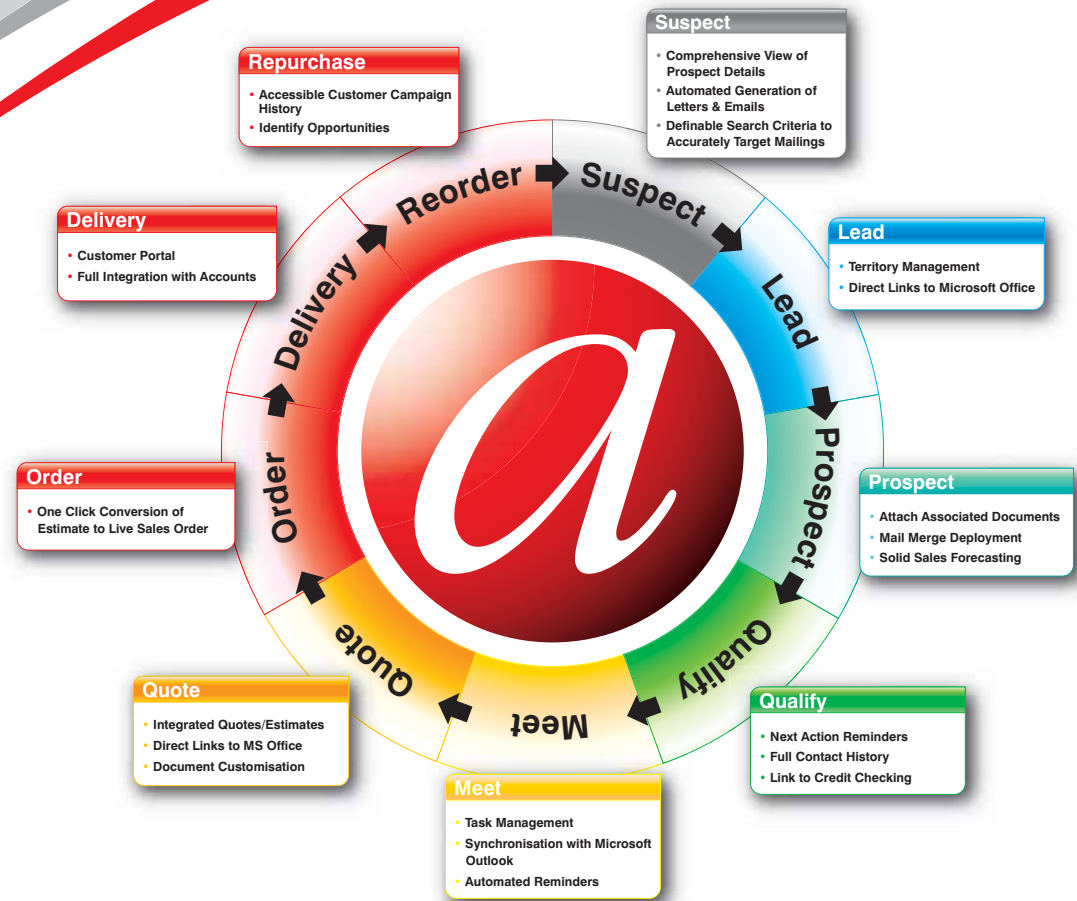
- On demand access to full customer information, including accounts history
- Quotes and estimates
- Document customisation (with your logo)
- Report on individual or group performance
- Establish proven and repeatable sales processes

Visibility of the Sales Pipeline

- Solid sales forecasting
- In-depth analysis of sales pipeline
- Monitor pipeline value generated per campaign
- Track success of previous activity

See pages 16 – 17 for further information

Integration with Access Accounts



Integration with Accounts

Access Integrated CRM has been designed to work hand in hand with Access Accounts solutions. Together, they offer the ultimate in integrated business solutions, teaming award winning accounts functionality with cutting edge CRM software.

Establishing a company-wide single, integrated view of each customer ensures every member of staff has a clear understanding of the needs, expectations and buying habits of the customer. This comprehensive view is made up not just of prospect data, but of

complete sales history, turnover, opportunities, quotes and more – presented in one single, easy-to-view screen. This gives your staff all the information they need in order to fulfil their roles in a fast and efficient manner.

An integrated solution enables any problems to be quickly identified and reacted to – there is no need to search through multiple, disparate systems.

Benefits of Integrated CRM

Create a universal, customer-centric knowledgebase

Access Integrated CRM offers the ultimate in true client-server integration. Taking snapshots of data and uploading changes back to the system is a thing of the past. Staff can now work with accurate, real-time customer and prospect information, whether they are office or field based. For the management team and staff members alike, all information is accurate and immediately to hand. Field based staff can access the CRM solution via a virtual private network, wherever they may be. Advanced security mechanisms ensure that only authorised users can access the solution and that the data cannot be intercepted.

Access Integrated CRM helps you to determine the current performance of your operations, evaluate success and steer future strategy accordingly. For example, a full history is kept against each campaign record, monitoring its progress and success. The analysis of this information can then be used to decide on future campaign activity.

Using a fully integrated CRM system significantly reduces re-keying of data, as all information is immediately updated across departments – saving your staff valuable time. And because information is automatically updated, you will no longer experience a time lag during downloading or uploading of data.

Access Integrated CRM enables employees to identify and act on sales and marketing opportunities. Every department in your business, from the accounts team to the sales team, the marketing team or customer services, views the same accurate, real-time information. This significantly increases cross-selling opportunities by giving every staff member an equal footing to be able to spot potential opportunities.

Open the communication channels between the customer and all your staff. Each member of your staff can see comprehensive notes on the core history of the customer including documentation and campaign history.

Create a complete history of interactions against each prospect record. External documents – for

example, quotes or emails, can be attached to the record for future reference. This comprehensive document history can be kept against every record in your database, and it is automatically carried through when a prospect is converted to a customer, meaning that no information is lost.

The benefits of an integrated CRM solution are felt in every department of your business; accurate, complete information regarding every customer, available to every member of your staff in every department will enable them to answer and deal with every query in a prompt and efficient manner. Access Integrated CRM brings business-wide benefits, increasing the potential for fast return on investment.

For service based organisations, Access Integrated CRM works seamlessly with Service Manager Editions (SME), combining key aspects of service to provide a complete system to co-ordinate and manage the Service Department.

Integration with Microsoft Office Applications

Access Integrated CRM has extensive integration facilities with the Microsoft Office productivity suite, extending the benefits of Microsoft software into the CRM solution.

Use the comprehensive search facilities to select the contacts you wish to work with and use this list to produce letters using Microsoft Mail Merge functionality, all from within Access CRM. Letters can be distributed with ease in hard copy or via email.

Synchronisation between Access CRM and Microsoft Outlook ensures no task is ever forgotten. Tasks set within Access CRM, by office and field based staff alike, are automatically synchronised with the user's Outlook calendar. Contact information is automatically pulled through with the task to the Outlook calendar ensuring every piece of necessary information is to hand.

Contact synchronisation is also made easy. Staff can choose to pull out only the contacts allocated to them and synchronise that contact information with Outlook. This is particularly useful for field-based staff as it enables them to make contact with their prospects wherever they may be. Any changes made to the task or contact information within Outlook are written back to CRM.

And in just one click, selected record lists can be exported to Excel for manipulation or distribution.

Integration with Core Business Applications

Access Integrated CRM has been designed to effortlessly integrate with any number of external core business applications.

For example, integration with postcode database software enables the quick and easy capture of new customer information. Direct links to credit checking services enable staff to verify credit status before agreeing terms with customers.

Integration with the Outlook Calendar

CRM is integrated closely with Microsoft Outlook. This means that setting a task within CRM automatically adds this task to the Microsoft Outlook calendar. In this way you can ensure that allocated actions are always completed.

The screenshot shows a CRM contact record for Mr G Warn. The contact information includes Job Title (New Contact), Phone (01462 483446), and E-mail (warn@baldwinfrancisotel.co.uk). The 'Tasks' tab is active, displaying a list of tasks:

Type	Contact	Description
email	Mr G Warn	email a price list please
call	Mr G Warn	Gerry would like to discuss the quote he

Below the task list, there are fields for 'Action By' (DR), 'Action Date' (27 FEB 2006), and 'Action Time' (15:00). The status is 'Outstanding' and the description is 'Gerry would like to discuss the quote he received this morning.'

The screenshot shows an Outlook calendar with a vertical time axis from 05:00 to 20:00. Two appointment windows are open over the 15:00 slot:

- Robin Sheridan - 0113 253 2768 - Appointment**: Subject: Robin, Location: Royal.
- Call Gerry Warn - 01462 483446 - Appointment**: Subject: Call Gerry Warn - 01462 483446, Location: Baldwin & Francis Hotel, Start time: Mon 27/02/2006 15:00, End time: Mon 27/02/2006 17:00, Postcode: 15 Minutes, Show time as: Busy. Description: Gerry would like to discuss the quote he received this morning.

Customers & Prospects

Acquiring and maintaining high quality information

A prosperous business is built around happy, loyal customers; Access Integrated CRM gives you and your staff the tools needed to target new customers, manage existing customer relationships and cultivate a loyal and lasting customer base. Over time, this information will become one of your most valuable resources - enabling you to take full advantage of all your previous interactions with customers and prospects.

Creating and Managing your Database

With Access Integrated CRM, a centralised information database shares knowledge, giving your staff easy access to complete customer account information, ensuring they can respond to queries faster. Associated documents, for example, e-mails, Word documents or PDFs, can be attached to the customer record so all interactions can be recorded and viewed at a later date. Contacts can be organised into groups to facilitate easy management of the information, and these groups can be recalled via user definable search keys.

The creation wizard guides you through the setup of your contact database including the pre-defining of fields and layout views. You can easily import data from another system, and you only need to enter customer details once. When customer information has been stored, it will be instantly made available across your entire Access Accounts system.

Allocate a sales representative for new prospects with ease using the territory management facility. With this enabled, you can allocate each contact a sales representative based on their postcode. Sales reps will then be able to search on this allocation field and pull up only their new records, enabling them to quickly get in touch with any new contacts that have been entered.

Once set up, you can manage your unlimited prospect database with ease. Access Integrated CRM gives each member of your staff fast and easy access to contact information - you can quickly find the information you need by typing in just a few letters of the contact or company name, the postcode or phone number. In fact, you can use Access Integrated CRM to define up to 18 searchable fields of your choice.

Interactions

Access Integrated CRM helps each member of your staff to interact with customers in an informed and professional manner. Account management is made easy with accurate information available at

the touch of a button, fostering a relationship with customers based on knowledge and trust.

Access Integrated CRM makes communication with your contacts easy. Computer Telephony Integration (CTI) improves productivity with outbound call dialling, enabling staff to quickly reach prospects and find more opportunities. Direct links to Microsoft Word and Outlook for letter and email templates mean that every method of communication is made straightforward and hassle-free.

The company-level information fields within CRM can be tailored to accommodate your way of working.

The screenshot shows the 'CRM Data Entry' application window. The main area is divided into several sections for data entry:

- Code:** BRI100
- Assigned to:** PETER JONES (North Sales Rep)
- Phone:** 08704 009013
- Fax:** 08704 009014
- Internet:** (checkbox)
- E-mail:** helen.farmer@thebrighthouse.org.uk
- Name:** The Brighthouse Hotel
- Address / Town / County / Postcode:** Coal Pit Lane, Clifton Village, HD6 4HW
- Business Style:** HOTEL
- No of Covers:** 150
- Saleman:** PETER JONES
- Avg price of covers:** 35
- Sales Area:** HARROGATE
- Turnover:** 745000
- Office Sales Rep:** JOSEPH WRIGHT
- No of Employees:** 50
- Details:** Number of Bars (3), Cellar Size (500000), Business Breakdown 1 (RESTAURANT), Business Breakdown 2 (BAR), Business Breakdown 3 (COCKTAILS), Food Style (FUSION), Wine Style (NEW WORLD), Licence Type (24 HOUR)
- Keywords:** (empty)
- Analysis List:** Ownership Style (OMB), Status (HOT), Monthly Spend (8500)
- Custom:** Company Next Action (15 MAR 2006), Last Purchase Date (24 JAN 2006), Next Wine Tasting (24 FEB 2006), Date of Last Visit (31 JAN 2006)

At the bottom, there is a table with columns: Contact, Job Title, Phone, E-mail, Next Action Date, Next Action.

Contact	Job Title	Phone	E-mail	Next Action Date	Next Action
Mrs H Farmer	Financial Director	08704 009013	helen.farmer@thebrighthouse.org.uk	16 JUN 06	Letter 1 pipeline
M P Rousseau	Head Wine Waiter	08704 009013	p.rousseau@thebrighthouse.org.uk	22 JUN 06	Telesales follow-up
New Contact					

Customers and Prospects

Scheduling/Setting Tasks

Don't let anything slip through the net; extensive integration with Microsoft Outlook means you can set your staff tasks that won't go unnoticed. Simply select a task, assign it to one of your team and synchronise with Outlook. The task will then appear in their calendar and automatic reminders will be actioned. These automatic reminders can be configured per user and per task so you can specify when a reminder is issued in relation to when the task is due for completion.

Within Microsoft Outlook, each user can choose how they wish to view their calendar, ensuring everyone is comfortable with the functionality with which they are working.

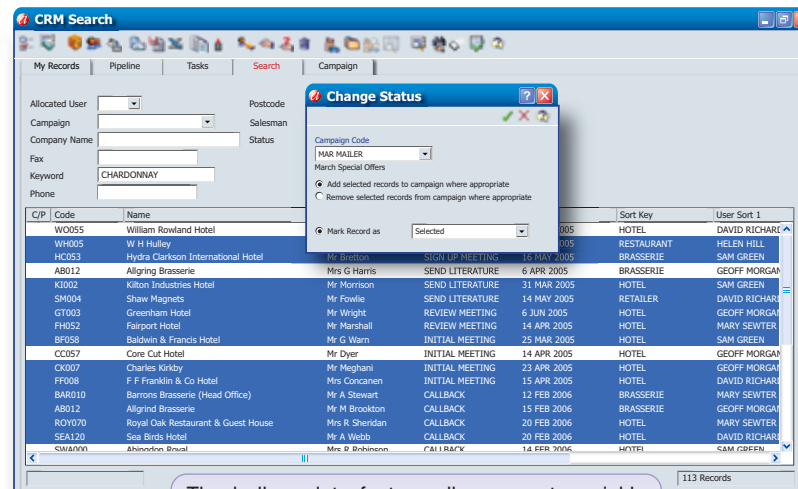
When a Prospect becomes a Customer

With Access Integrated CRM, converting a prospect record to a customer record couldn't be easier; in just one click, the status of the record can be changed. Equally as easily, estimates can be converted to live sales orders, so a prospect wanting to go ahead with a quotation can receive the fastest service possible, with the least amount of effort from your staff. And because Access CRM is integrated with the rest of your Access Accounts solution, no re-entry of information is necessary, enabling the most efficient and productive way of working across your entire business.

Reach Target Markets Accurately and Cost-effectively

Access Integrated CRM gives you all the tools you need to accurately target groups of customers or prospects, and execute effective marketing campaigns from start to finish.

There is no need to struggle trying to pull out the data you need; with Access Integrated CRM you can create targeted campaigns based on advanced search criteria, relevant to you.



The bulk update feature allows you to quickly change the status of any number of prospect or customer records.

Marketing Management

Executing and tracking multiple campaigns

Plan, execute, follow up and track specific marketing activities for targeted groups of prospects or customers. There is no limit to the number of campaigns you can have running at any one time. With Access Integrated CRM, you are in control of calling, mailing, faxing and emailing.

Once you have selected your data via the easy-to-use, customer definable sort keys, you can transfer it straight into Microsoft Word for mail merge, or into other database tools or comma separated variable files for deployment by other means. Automated email campaigns can be set up and sent out in a straightforward and efficient manner, directly from within Access Integrated CRM.

Targeting new prospects is made easy. Each time a new prospect is added, the record is updated with the date it is created. This date can then be used to

identify 'new' prospects so they can be included in the selected campaign. In this way, you can ensure that prospects who have shown an interest in your products are given every opportunity to become a customer.

Campaigns can be personalised to ensure more customer-centric marketing communication. The content and subject of mailings can be personalised with any information stored within your database.

Key Benefits Summary

- Creation wizard makes setting up a new customer record fool proof
- Organise contacts into groups to facilitate easy management of information
- Use territory management facility to allocate regional representatives with ease
- 18 searchable fields of your choice allow you to work with just the records you need
- Computer Telephony Integration (CTI) improves productivity with outbound calling
- Synchronisation with Microsoft Outlook, along with automatic reminders ensures no task is lost
- One click conversion of prospect to customer and estimate to live sales order eliminates re-keying

C/P	Code	Name	Contact Name	Business Type	Sales Manager	Sales Area	Internal Rep.
	DAC110	Dacre Arms	Gerald O'Connaught	RESTAURANT	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	KIN040	The Kings Arms	Mr A Mitchell	HOTEL	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	WIL030	Willerby Manor Hotel	Mrs T Marchant	HOTEL	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	KIN130	Kings Arms	Mrs C Hart	RESTAURANT	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	BEN070	Bentley Tavern	Mr R Williams	HOTEL	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	SCA100	Scalby Manor	Mr E Sanders	RESTAURANT	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	DAC100	Dacre Arms	Mr T Bryant	RESTAURANT	MARY SEWTER	NOTTINGHAM	HELEN SMITH
	DALL30	Dalesgate Hotel	Mrs S Deere	HOTEL	MARY SEWTER	MANCHESTER	HELEN SMITH
	FOX010	Fox-Menston	Mrs L Anderson	RESTAURANT	MARY SEWTER	MANCHESTER	HELEN SMITH
	CRO020	Crown Hotel - Head Office	Mr A Wilkins	HOTEL	MARY SEWTER	MANCHESTER	HELEN SMITH
	GR1800	Grimsby Wines Ltd	Mr A Alcock	MERCHANT	MARY SEWTER	MANCHESTER	HELEN SMITH
	GRA700	Grandby Wine Wholesalers Ltd	Mr L Peterson	MERCHANT	MARY SEWTER	MANCHESTER	HELEN SMITH
	STE600	Stewart Bros Wine Wholesale Ltd	Miss L Henley	MERCHANT	MARY SEWTER	MANCHESTER	HELEN SMITH
	BAR010	Barrons Brasserie (Head Office)	Mr A Stewart	BRASSERIE	MARY SEWTER	HARROGATE	HELEN SMITH
	MOR160	Morris Wine Wholesalers	Mr F Wells	MERCHANT	MARY SEWTER	HARROGATE	HELEN SMITH
	RUT200	Rutherford's Wine Merchants Ltd	Mrs H Jessop	MERCHANT	MARY SEWTER	HARROGATE	HELEN SMITH
	DOM	Dombalfic Hotel & Restaurant	Mr J Tillman	HOTEL	MARY SEWTER	HARROGATE	HELEN SMITH

The easy-to-use search screens make it simple to find the right target data for your campaigns.

Campaign Management

The screenshot displays a CRM interface with a 'Campaign' tab selected. The main window shows a table of campaign details for 'Current Contact'. A 'Campaign History' window is overlaid on top, showing a detailed log of amendments and user actions for each campaign.

Code	Contact	Type	Status	Start Date	Date Added	User Added
JAN MAILER	Mr L Henderson	January Special Offers	Catalogue request	1 JAN 2006	1 JAN 2006	JW
FEB MAILER	Mr L Henderson	February Special Offers	Order Placed	1 FEB 2006	2 FEB 2006	JW
MAR MAILER	Mr L Henderson	MARCH Special Offers	Selected	1 MAR 2006	1 MAR 2006	JW

Amendment Date	User	Campaign	Details	Status
1 Mar 2006	JW	MAR MAILER	Email Campaign White Wi	Selected
25 Feb 2006	SG	FEB MAILER	9 Month order received	Order Placed
18 Feb 2006	SG	FEB MAILER	6 month regular order	Sales Quote
12 Feb 2006	SG	FEB MAILER	Wine Tasting New Reds	Sales Visit
10 Feb 2006	JW	FEB MAILER	Courtesy Call	Follow up call
14 Feb 2006	JW	FEB MAILER	Letter sent by email	Mailout Sent
2 Feb 2006	JW	FEB MAILER	Winter Warmer Reds	Selected
15 Jan 2006	HS	JAN MAILER	Send 2006 selection	Catalogue requ
5 Jan 2006	JW	JAN MAILER	Courtesy Call	Follow up call
2 Jan 2006	JW	JAN MAILER	Letters sent by post	Mailout Sent
1 Jan 2006	JW	JAN MAILER	Post Xmas Special Offer	Selected

A comprehensive campaign history is automatically recorded against each contact.

Campaign Management

For each campaign, a record is created within Access Integrated CRM with a number of stages of progression. As each stage in the campaign is completed, the campaign record is automatically updated. This enables you to see exactly what stage a particular campaign has reached at any time. Responses to the campaign are also recorded and analysed so that the results can be considered in future campaign planning. Marketing decisions can therefore be refined over time based on actual results from past campaigns.

Similarly, a campaign history is recorded against each prospect so you can see exactly what communications they have received. All interactions with the prospect can be tracked alongside their company information, allowing you to analyse and tailor the marketing effort for that customer accordingly.

Campaign Management

Create, deploy, track and analyse

By using Access Integrated CRM, you can make a full view of each customer available to your staff, whilst they are interacting with them. When a customer calls, Access CRM can be used to quickly retrieve and view information relevant to the customer, by using the 'smart tag' that appears by the customer name. This enables your personnel to serve customers more efficiently, with all the information available.

Having such detailed customer information to hand also allows your staff to identify and take action on any potential opportunities to enhance the client relationship. This may involve individually selecting a prospective customer to be involved in a particular mailing campaign or assigning a task to a colleague for a follow up phone call or meeting. Tasks can be assigned from within CRM and will automatically synchronise with an individual's Microsoft Outlook calendar, complete with automated reminders to ensure no task goes unnoticed.

As with all Access systems, Access CRM is fully integrated with the other modules in your solution. Taking advantage of this integration gives you the option to calculate and track the marketing cost per lead and per sale. Using the Costing module, such in-depth analysis of your marketing activity is possible with every campaign, giving you greater visibility and control.

Lead Management

With Access Integrated CRM, it is easy to create campaign follow-up lists for your telesales staff. The list-driven nature of Access CRM enables staff to view only their personal calling list, which they can work with in easy-to-view, intuitive screens.

All interaction with prospects can be tracked, including a full record of every conversation, and the resulting actions. You can set next action dates for particular prospects, as well as assigning task responsibilities to ensure no opportunities are lost.

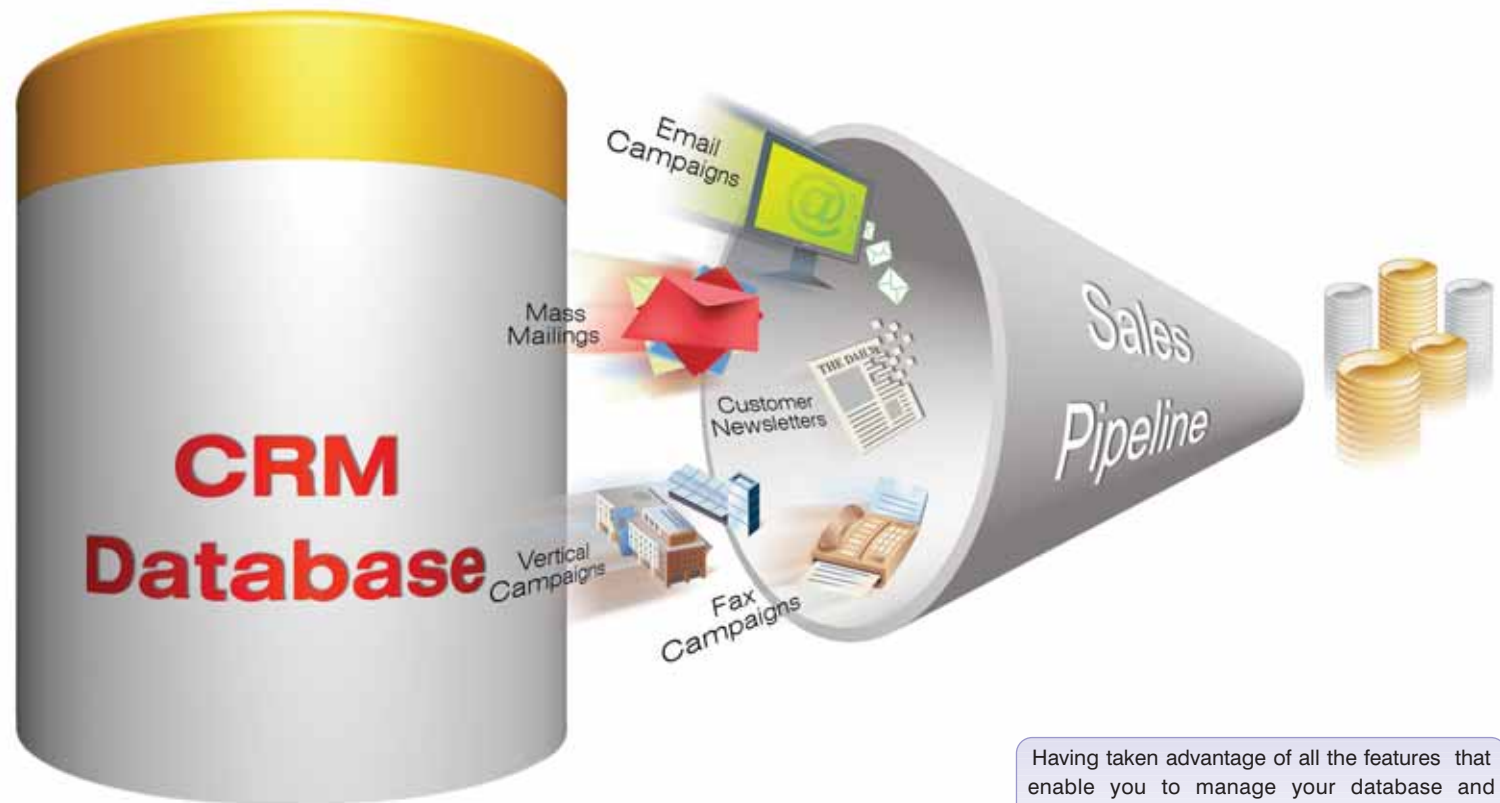
By using a definable field to assign lead sources, you can ensure that you understand where every enquiry originated. Reporting by these lead sources will enable you to understand more fully the success rates of your campaigns.

Marketing can be an exact science; the ongoing assessment and modification of your marketing plans, taking into consideration the results of past campaigns, is a key facet of your business strategy. The analysis available in Access Integrated CRM allows the thorough evaluation of your marketing activities, helping you to learn from past campaign results and evolve your strategies for the future.

Key Benefits Summary

- Unlimited number of targeted campaigns can be run at any one time
- Direct links to Microsoft Word for Mail Merge and tools for deployment by other means
- Automated email and fax campaigns
- Complete campaign history for each prospect - automatically updated with progress
- Create campaign follow-up lists for telesales staff
- Assign lead sources to understand where every enquiry originated
- Integration with Costing module allows you to track cost per lead and per sale

Sales Pipeline



Having taken advantage of all the features that enable you to manage your database and campaigns, use Access Integrated CRM to maximise your sales revenue.

Sales & Pipeline Management

Take advantage of every sales opportunity

The sales pipeline is the lifeblood of every business; it holds all the information you need to take advantage of future sales opportunities and to anticipate the timing and value of those opportunities. Access Integrated CRM combines an effective pipeline management solution with full Smart Tag views of customer information so you can easily monitor current performance and forecast future sales.

Managing the Pipeline

Once a prospect has progressed into a full sales enquiry, accurate documentation is key to closely tracking progress and establishing high-quality opportunities. With Access Integrated CRM, you can quickly view and manage all aspects of the sales cycle.

The extensive integration capabilities within all Access solutions mean that information entered into Access Integrated CRM is instantly available within the accounts modules, and vice versa. This enables you to view a customer's full history at a glance, from inclusion in past campaigns to agreed credit terms. You are able to view any outstanding estimates, current orders and invoices awaiting payment, as well as a full transaction history, and much more.

You can generate estimates and quotations from within Access Integrated CRM without needing to open another application, establishing a standard of fast service for your customers. You can customise documents with your logo to ensure consistency of branding and corporate image.

Forecasting Opportunities

Access Integrated CRM enables you to produce a dynamic and realistic projection of future sales. For each sales enquiry you can estimate the timing of the sale, along with the anticipated value and the likelihood that it will turn into a sale. Access Integrated CRM combines the information for all sales leads to give you an estimated forward projection of sales revenue.

The sales pipeline can be analysed by customer type, by sales area or sales person, as well as by product or solution category. In this way you can understand where your sales effort is succeeding, and where it is likely to miss expectations.

As the probability of success is changed for a sales enquiry, Access Integrated CRM updates the pipeline automatically to reflect the amendment, providing an up-to-date, easy to understand summary of predicted sales.

Reporting on Sales Performance

Access Integrated CRM gives you full visibility of your sales performance, helping you to track the success of previous activity and plan for future communications. In this way you can evolve established, successful and repeatable sales processes.

Using Access Integrated CRM, you can powerfully report on the pipeline to evaluate the team's performance individually or as a group. The success of a campaign can also be tracked by assessing the pipeline value generated.

Key Benefits Summary

- Ensure you take advantage of every sales opportunity
- Accurately monitor current performance and forecast future sales
- View customer's full history - from inclusion in a campaign to agreed credit terms
- Generate quotations and estimates from within CRM
- Analyse sales pipeline to understand where you are succeeding and where you need to focus your efforts
- Evaluate your team's performance individually or as a group
- Evolve established, successful and repeatable sales processes



Sales Manager

I'm responsible for bringing in the company's sales revenue. I need full visibility of the sales pipeline - all the time.

My job is all about keeping track of what's going on with my sales people, and predicting what sales will be closing in three or six months time. I need visibility into every part of the CRM solution: I need to see the performance of each member of staff – how many leads they are working on, what the progress is with those leads – and why. I want my sales people to be able to get all they need from the solution so they're not phoning the office every five minutes for information.

I need to be able to find out the lead times between the first contact with the client and closing of the sale – I want to be able to see exactly what happened from the information that is stored in CRM in order to establish successful sales processes across the team. If a hot lead hasn't been followed up or converted to a sale, I want to know why.

I need to see the performance of each staff member individually and their performance as a team. I need to be able to assign tasks to them that will appear in their calendars so I know they will get done - and I want to know when they're not.

I need to know what the current value of the sales pipeline is and I need be able to forecast the value for the future. I want to be able to see how much value is associated with each lead, and the probability of making the sale.

And finally, I want all this from one solution!

Key Benefits

- Dynamic and realistic projection of future sales
- Centrally located documents for easy retrieval and review
- Ability to assess the effectiveness of marketing campaigns by reviewing the pipeline generated
- Complete transaction enquiry system for estimate, order and profit analysis
- Up-to-date sales pipeline

Field Salesperson

I want to maximise my sales figures, so I need to have all the information about a prospect when I call on them.

Wherever I may be throughout the UK or beyond, I need access to accurate contact information. Being on the road can make it really difficult to keep up-to-date with what's going on at the office and the changes that are being made every day to the database. I often find myself at an information disadvantage, which can have a negative effect on my interactions with prospects or customers.

My laptop and PDA are like my information channel to the office - keeping me up-to-date. It's vital that I can get access, from wherever I may be, into the CRM database, and that the information I can reach is comprehensive enough to answer all my questions. I need all the information that was gleaned at the prospecting stage and much more...

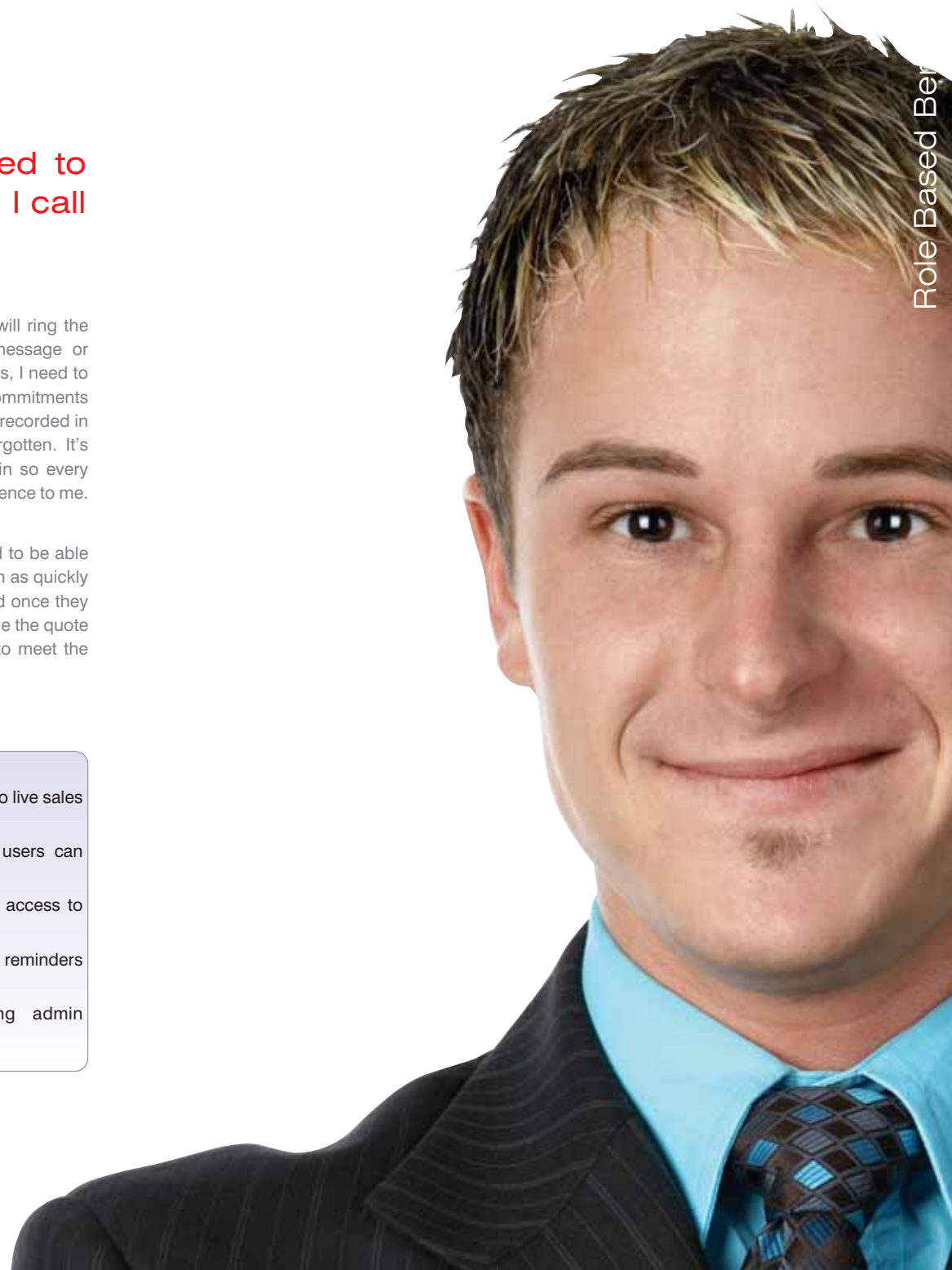
Having a thorough history of each customer enables me to see what products they've bought in the past, so I can understand what they might buy now. Having information on the competitive products the client is considering helps me to accurately tailor my sales pitch. Being able to access the latest product prices and promotions means I can confidently talk about pricing. Having a full marketing history against each customer means I can see exactly what information they've received so I don't offer the same collateral again. And having that information helps me to spot potential up-selling and cross-selling opportunities - if they've responded to a mailer in the past but nothing has come of it yet, there is a good opportunity for me.

Often, clients that are assigned to me will ring the office and a colleague may take a message or arrange a meeting for me. In these cases, I need to know as quickly as possible what my commitments are and I need them to be automatically recorded in a format that means they can't be forgotten. It's difficult to find the time to do my admin so every task that's automated makes a real difference to me.

When a client is really interested, I need to be able to get a quote or an estimate out to them as quickly as possible, even if I'm on the road. And once they decide to buy, I need to be able to change the quote to a sales order immediately, in order to meet the delivery deadlines.

Key Benefits

- One click conversion from estimate to live sales order
- Fully searchable database means users can pull out only their own tasks
- Attached documents feature allows access to the full story
- PDA synchronisation ensures task reminders are received wherever staff may be
- Easy to update system making admin straightforward for field-based staff





Marketing Manager

Ultimately, my job is about generating sales leads. I need the right tools to help me do that.

The pace at which we work in my department is off the scale. We're always working to deadlines and are under constant pressure to be creative and bring home the results. When I need information, I need it fast.

I need to quickly see the status of each campaign I have running, and most of the time there are four or five going on at once. That can be a major juggling act.

For each campaign I want to know what has been sent out and to whom. I need to know which follow up calls have been made and which are still outstanding. I want to know how many leads have been generated as a result of each campaign. And, of course, I want to know how much the campaign has cost me, and in turn, what the cost per lead and cost per sale is. I'm always being asked by board members "How are the campaigns going?" so I need to be able to pull out the information quickly, and in a format that's easy to work with.

When I'm thinking about running a new campaign, I want to be able to search the database by region, industry type, salesperson...and much more besides. If I want to run a campaign to a specific set of prospects, I need to know exactly how many prospects I have in that target area so I can quickly make decisions.

And, of course, I'm always looking for the next great idea! By being able to quickly review what works and what doesn't as a result of past and present campaigns, I can better understand what I need to focus on in the future.

In every aspect of my role, I need to be able to keep track of a huge amount of information, and I need to be able to get to bits of that information fast.

Key Benefits

- User definable search criteria make it easy to target the right prospects
- Full campaign history allows complete visibility of the marketing messages received by each prospect
- Extensive Integration with Microsoft Office applications makes it easy to deploy letters and emails
- Single prospect and customer database driving all activity means all users see the same up-to-date information
- Quick and easy campaign management with no limit to the number of campaigns that can be run at one time

Call Centre Operative

My job is to deal with every call in the best possible way - and having full information to hand is vital.

The most important thing I need for my job is information – as much as I can possibly get. Knowing something as simple as which mailer someone has received makes the initial stages of a conversation much easier and can often lead to a positive outcome. In my role, being able to talk to a prospect or customer with absolute confidence is vital.

When I'm building my call lists, I need to be able to search the database on every piece of information that's stored in it, including phone and fax numbers. I also use the search facilities to find details when I get incoming calls, to quickly find the customer's history so that I can help them in the best possible manner. I need to be able to sort my lists by the source or status of the lead, the next action date or the task, the date they were prospected and by operative allocated to the record.

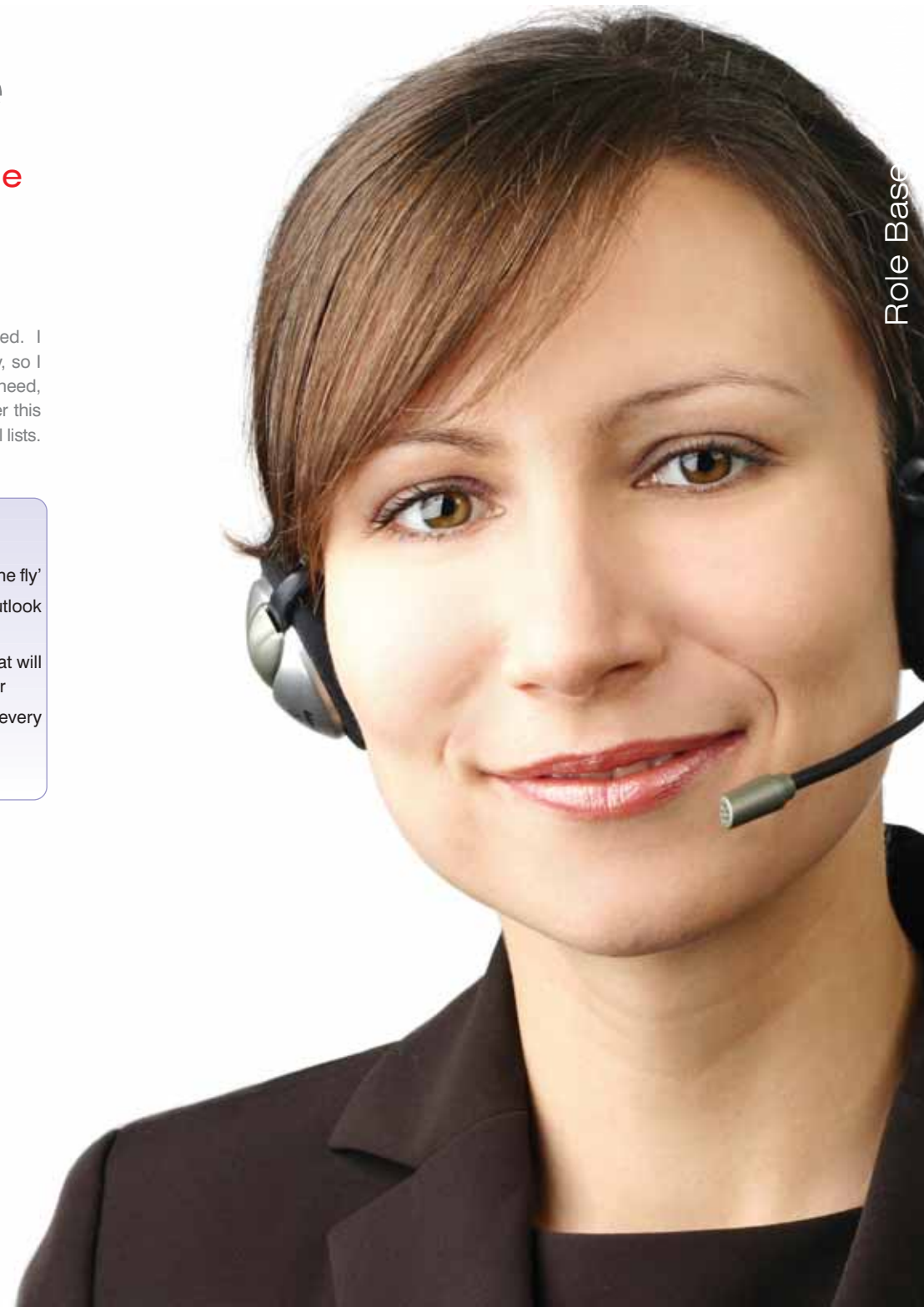
When I'm on the phone, I need to be able to see contact and company details, as they often differ. I need to know everything we know about that customer – when they first contacted us, or when we contacted them. What marketing collateral they have been sent, what quotes they have received and whether they have placed any orders, their credit terms, their allocated sales rep, the names of their children! I need as much information as I can possibly get on that person to be able to build up a complete picture of them, and when I have that picture I can talk to them with ease. I know what their buying habits are, I know what they needed last year, and I know what they need now. The more information I have, the better I can do my job.

And when I'm doing my follow up tasks, I need it to be as quick and easy as possible to send prospects and

customers the information that I've promised. I regularly send out more than 50 letters per day, so I need to be able to find the document I need, personalise it and get it out the door. The easier this is, the more time I can spend focusing on my call lists.

Key Benefits

- Customisable screens for each user
- Ability to update prospect information 'on the fly'
- Synchronisation directly with Microsoft Outlook ensures every enquiry is followed up
- Allocate tasks from within Access CRM that will appear in your Microsoft Outlook calendar
- Action lists make it easy to ensure every commitment is met



About Access

Vision for the Future

Our vision is to develop and provide the software that **every** user recommends. This vision drives us relentlessly to better the services and products that we offer. The Real Finance FD's Excellence Awards (2005) revealed that Access has the highest user recommendation level in the mid-range accounting software market.

Access customers proved to have very high satisfaction levels, and are up to twice as likely to recommend their accounts package to others as the customers of eight leading competitors. One FD commented: "It is a stable and reliable package, easy to use with intuitive menus, but rich with functionality, at an affordable price. It is also well supported in the unlikely event of a problem."

Accreditations

Access Accounting is one of only a handful of UK software vendors to have achieved Microsoft Gold Certified Partner status. This is given in recognition of long-standing expertise in the development of robust software products based on Microsoft technologies.

Individual Access solutions are fully accredited by the industry's major authorities, including HM Revenue and Customs and the ICAEW (Institute of Chartered Accountants in England and Wales). Access complies fully with the BASDA Code of Practice and was instrumental in drafting many of its quality standards, including those for software development, quality assurance testing, maintenance and documentation.

Both the company and its solutions have received numerous awards for innovation and excellence.

Software of the Year



Access' flagship Dimensions range of software has been voted Mid-range Software of the Year 2005/6 by Accountancy Age.

We have consistently been recognised as one of the best.

Dimensions has been named as one of the top four mid-range software packages every year for the last six years and has received numerous commendations from the judges.

This year, the judges remarked that the category was among the hardest fought, but commented that Dimensions' 'flexibility and high level of customer satisfaction make this the outstanding package for medium sized UK businesses'.

Commitment to You

Providing a long-term solution

We want to make it easier for you to succeed in business. This means increasing your turnover and reducing your costs. Access can help you to do this in two ways. Firstly, by bringing complete clarity to your business data and encouraging proactive decision-making throughout your company. Secondly, by giving you all the tools you need to control and improve your business processes.

To make this possible, Access solutions combine the operational advantages of modern technology with the security afforded by traditional, fully auditable 'double entry' accounting methods. This gives you an appropriate balance of reliability with flexibility, and functionality with ease of use. Our commitment to you is simple. We will deliver the solutions you need to run your business more profitably.



Determining which solutions are right for you

Your local Specialist Centre will carry out a comprehensive needs analysis, to establish which solution and combination of modules is best suited to your business activities and your budget. With their expertise in project management, they can ensure this one-stop solution takes care of all your integration requirements.

Post-implementation reviews are used to ensure that your new system is delivering maximum returns. As your business moves on and your needs gradually change, the specialist centre will assist in expanding and upgrading your system in the most cost-effective manner possible. You will never outgrow your Access solution.

Complete support from day one

Access Specialist Centres work closely with your team to ensure a smooth implementation and stress-free changeover period. With the system in place, they help to structure your nominal ledger, design your board reporting pack and configure business intelligence tools for maximum impact.

Access solutions are easy to use, but if you do need help it's never far away. On-screen 'context sensitive' instructions guide you through every module and system-wide training is provided by your Specialist Centre. This training is carefully tailored to the needs of different departments and users. Qualified support staff can always be contacted online or by telephone, for an instant response to your enquiries.

Access Specialist Centres

We understand that the decision to implement a new business solution is not taken lightly. The commitment shown by your supplier is just as important as the software itself. This is why Access solutions are sold exclusively through a national (and international) network of accredited Specialist Centres.

Staff at Access Specialist Centres undergo a stringent training programme and are re-accredited on an annual basis. This ensures that they are equipped to supply, implement and support the full Access range, with the greatest possible emphasis on quality and service.

The Access Group offers a comprehensive range of best-value business software, including:

- **Client/Server business and accounting solutions**
for medium and large companies
- **LAN business and accounting solutions**
for small and medium companies
- **Integrated CRM solutions**
for high performance relationship management
- **Full MRPII and capacity planning**
- **Supply Chain ERP solutions**
- **Government-approved payroll solutions**
including P11D
- **Business Intelligence solutions**
and advanced management reporting
- **Integration tools**
for seamlessly linking any number of business applications



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Access Accounting Ltd has taken every reasonable care to ensure that this brochure accurately reflects the Access software range. Access Accounting Ltd has a policy of continual development and will add new features on an ongoing basis. On occasions, it is possible that an existing feature may change or be deleted. If a specific feature is critical to your business, you should confirm that it is available and will continue to be available at the time of ordering.