G-Cloud15
Access Lightyear
Service Definition

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1 Service Overview

Lightyear is an award-winning, 5-star rated cloud-based purchasing, accounts payable, and expense management automation platform designed for SMEs and mid-market organisations. As part of The Access Group since 2024, Lightyear delivers intelligent automation solutions that transform purchasing, accounts payable, and expense management processes, enabling finance teams to save up to 80% of processing time while eliminating manual, paper-based workflows.

Core Capabilities

1. **Intelligent Data Extraction**

Lightyear's AI-driven data extraction engine, Smart Extract+, automatically captures line-by-line invoice data with high accuracy in as little as 15 seconds. The platform handles various document types through multiple input channels: email forwarding, drag-and-drop upload, and mobile app.

2. **Automated Approval Workflows**

The platform provides customisable, multi-tiered approval workflows supporting up to 8 levels of approval. Key features include:

- Automated routing based on supplier, keyword recognition, or value
- Mobile approval capability via iOS and Android apps for on-the-go authorisation
- Proxy approval functionality to maintain workflow continuity during staff absence
- Real-time notifications and @mention collaboration tools

3. **Purchase Order Management**

Create, approve, and track purchase orders seamlessly with:

- Rapid PO creation from supplier catalogues
- 3-way matching (PO, goods receipt note, invoice) at line-item level
- Supplier email integration for immediate ordering

4. **Fraud Prevention and Compliance**

Built-in security features protect organisations from financial fraud:

- Bank verification that flags discrepancies between extracted bank details and supplier records
- Price checking against agreed supplier price lists
- Duplicate invoice detection
- Complete audit trail with timestamped approval histories
- Secure online document archive with 8-year retention

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5. **Automated Bookkeeping and Coding**

Lightyear eliminates manual coding through intelligent automation:

- Rule-based assignment of GL codes, tax rates, tracking categories, and departments
- Supplier-specific or keyword-based automation rules
- Machine learning that improves accuracy over time
- Automated supplier statement reconciliation with variance flagging

6. **Advanced Reporting and Business Intelligence**

The Advanced Reporting Engine provides:

- Intuitive reporting interface and dashboards
- Real-time access to rich financial data across the entire accounts payable process
- Line-by-line document data analysis
- Customisable reporting capabilities

Integration Capabilities

Lightyear offers cloud integrations with leading UK accounting and ERP platforms including:

- Access Dimensions
- Access Financials
- Xero
- Sage (50, 200, Intacct)
- QuickBooks Online
- AccountsIQ
- NetSuite
- Microsoft Dynamics 365 Business Central
- iPlicit
- WCBS

The Access Group Ecosystem

As a member of The Access Group family, Lightyear operates with the Access EVO suite, providing powerful AI capabilities and advanced user benefits including:

- Single sign-on (SSO) via Access Identity across all Access products
- Unified user experience through Access Workspace
- Seamless switching between Access products via the Access Button
- Centralised user management through Access Admin Portal
- Role-based access control across the Access organisation
- AI features through CoPilot

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Lightyear is part of The Access Group, one of the largest UK-headquartered providers of business management software, serving more than 100,000 customers globally with approximately 6,800 employees.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath
Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e- learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities
At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do.

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Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey
Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

Full details of our Flightpath implementations for Access Lightyear can be found here.

3 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment
We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans as detailed below.

The Essential Plan
The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan
Get answers faster
As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success

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portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Access Customer Success Plans

Get to know our knowledge base

Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community

Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

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4 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specializing in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business, technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

5 Backup and Disaster Recovery

This section documents the steps necessary to activate business recovery plans to support full restoration of systems or facility functionality. The main objectives are:

- To minimise interruptions to the normal operations of Lightyear.
- To limit the extent of disruption and damage.
- To minimise the economic impact of the interruption.
- To establish alternative means of operation in advance.
- To provide for smooth and rapid restoration of service.

Service RPO and RTO targets
This section established the relevant Recovery Point Objectives (RPO) and Recovery Time Objectives (RTO) in the event of an incident/disaster.
RTO is 6 working hours and RPO is 24 working hours

Data Backup and Restoration Plan
AWS backups are scheduled and managed via the AWS Relational Database Service (RDS). Backups are stored in AWS S3 and can be restored to a new database in the event of the original being removed/destroyed via the RDS console. Database retention period is 7 days.

Server Recovery Information
The application runs on AWS EC2 instances managed by AWS Elastic Beanstalk and are

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based on standard Amazon machine images (AMIs). Elastic Beanstalk automatically spins up instances of the application in the event of a server crash so that at least one instance of each application is always available.

Network and Telecommunication Recovery

In the event of any disaster which disrupts the network and/or telecommunications, re-establishing connectivity will be a high priority in the recovery process. Lightyear's office is located in the Catalyst Inc building; thus, network and telecommunications channels are managed by the host as per the tenant's agreement.

Application Recovery Information

Application source and build artefacts are tagged and archived in the Lightyears CI environment hosted in Azure DevOps and can be deployed, re-deployed, rolled back etc as required. In addition, AWS Elastic Beanstalk also archives the current and previous version of applications so that new or replacement instances of each application can be spun up either manually or automatically under the control of Elastic Beanstalk.

6 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

7 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

8 Development Life Cycle

As one of our core products Access Lightyear has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (with releases weekly) and all companies benefitting from them at the same time.

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9 Technical Requirements

Lightyear runs on any computer with a browser and Internet connectivity.

Web Browsers
Google chrome (Recommended)
Microsoft Edge
Firefox
Safari

10 Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.

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