G-Cloud15

Access Evolve Suite

Service Definition

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1 Service Overview

Access Evolve is a fully integrated business management suite that uniquely combines financial management, payroll, HR, and operational tools within a single, unified platform—eliminating the need for costly third-party integrations or marketplace add-ons.

Unlike finance-only solutions that require separate payroll and HR systems connected via integrations, Access Evolve delivers native integration across all modules. Data flows automatically between finance, payroll, and HR without manual intervention, API configuration, or synchronisation delays. Payroll journals post directly to the General Ledger. Employee data is maintained once and shared across all modules. This single-platform approach reduces implementation complexity, lowers total cost of ownership, and eliminates the data integrity risks inherent in multi-vendor solutions.

The system is highly secure, always up to date with the latest functionality, and provisioned from UK-based data centres.

Why Choose an Integrated Suite?
Many cloud finance solutions require organisations to procure separate payroll and HR systems, then connect them via integrations or marketplace add-ons. This approach introduces:

- Additional vendor relationships and contracts to manage
- Integration maintenance and API version compatibility requirements
- Data synchronisation delays and potential integrity issues
- Higher total cost of ownership when all components are included
- Implementation complexity coordinating multiple vendors

Access Evolve eliminates these challenges by providing finance, payroll, and HR from a single vendor on a single platform. One contract, one support relationship, one implementation, one source of truth.

Scalable Architecture
Access Evolve is available in three tiers—Grow, Expand, and Advance—designed to match your organisation's size and complexity. As your business grows, you can move between tiers or add optional modules without replacing your core system. This modular approach means you invest only in what you need today, with a clear path to expanded functionality tomorrow.

Tiers	Entities	Suited For
Grow	Up to 3 entitles	Organisations seeking integrated finance and payroll
Expand	3+ entities	Growing organisations requiring spend automation and multi-currency

Advanced	3+ entities	Multi-entity organisations needing CRM, advanced analytics, and consolidation

Access Evo Platform

Access Evolve is delivered through Access Evo, an AI-enabled digital platform that unifies systems, data, and users within a single, secure environment. Through Single Sign-On, Access Evo provides a personalised experience for each user, enabling teams across the organisation to input data, action approvals, and access relevant reports.

Platform Capabilities:

- Personalised dashboards providing role-specific access to applications, data, and documents
- Integrated analytics consolidating data from all modules to deliver real-time business intelligence
- AI-Powered Copilot enabling natural language queries—for example, "Which suppliers require payment this week?"—delivering actionable insights in seconds
- Cloud-based document storage with secure 24/7 access and version control
- Mobile access via Access Evo app for iOS and Android

Features

Integrated Finance and Payroll

Access Evolve is one of the few cloud business management solutions to offer natively integrated finance and payroll from a single vendor. This eliminates the need for third-party payroll integrations or marketplace add-ons.

- Payroll journals post automatically to the General Ledger—no manual journal entry or file imports
- Cost centre and departmental analysis flows directly from payroll to management reporting
- HMRC submissions handled directly within the platform
- Real-time payroll cost visibility within financial reporting

Core Financial Management

- Multi-dimensional General Ledger with configurable analysis segments
- Sales and Purchase Ledger management
- Cashbook with automated bank reconciliation
- Credit control and collection management
- Multi-currency and multi-entity support (Expand and Advance tiers)
- Fixed asset register with multiple depreciation methods
- Sales and purchase accruals

Payroll

- Integrated payroll with automated HMRC submissions
- Automated journal postings to finance
- Employee self-service for payslips and P60s

Spend Automation (Expand and Advance)

- AI-powered bank reconciliation and transaction matching
- Accounts payable automation with OCR invoice processing
- Purchase order processing with configurable approval workflows
- Employee expense management

Customer Optimisation (Advance)

- Customer Relationship Management
- Business health dashboard with Experian risk data
- RFM (Recency, Frequency, Monetary) analysis

Analytics and Reporting

- 13 standard dashboards included
- Real-time management information
- Configurable reports via Access Office Integration (AOI)
- Advanced analytics with Fathom (Advance tier): forecasting, consolidations, benchmarking

Integration

- Open API for third-party system integration
- Pre-built connectors to 250+ applications
- Web services API for CRM, payroll, and operational systems

Project Accounting (Optional)

- Project costing and Work in Progress tracking
- Time recording and resource scheduling
- Billing management
- Project dashboards and profitability reporting

HR & Talent (Optional)

- People management and absence tracking
- Performance management
- Recruitment
- Learning management
- Reward and recognition

Benefits

Integrated Suite Advantage

- Single platform for finance, payroll, and HR—no third-party integrations required
- One vendor relationship, one contract, one support team
- Data entered once flows automatically across all modules ensuring complete data integrity

- Payroll journals post directly to the General Ledger without manual intervention or file imports
- Employee records maintained centrally and shared across HR, payroll, and finance
- No API maintenance, version compatibility issues, or synchronisation delays
- Lower total cost of ownership compared to multi-vendor solutions with marketplace add-ons
- Single implementation project rather than coordinating multiple vendors

Operational Benefits

- Modular design allows organisations to start with core functionality and add modules as requirements evolve
- Reduced manual data entry through automation and AI, with customers reporting month-end processing reduced by days
- Real-time visibility of financial position across single or multiple entities
- Configurable to meet standard setup requirements without bespoke development
- Quarterly platform updates automatically applied—always on the latest version
- UK-based data centres with geo-redundant storage and enterprise-level security
- Scales from single entity to complex multi-entity structures without system replacement

Modules by Tier

The modular design means you can build an integrated system capable of managing the unique needs of your organisation—today and in the future.

Grow

Core Modules Included:

- Access Financials (General Ledger, Sales Ledger, Purchase Ledger, Cashbook, Credit Control)
- Access Payroll with HMRC integration
- Access Evo Platform (SSO, Feeds, CoPilot, Spaces, Mobile)
- Access Data Engine and Analytics (13 standard dashboards)
- Engage, Learning Lite, Collaborate, Applause
- Access Document (up to 5GB storage)
- Access Digital Tax

Expand

Everything in Grow, plus:

- AI Bank Reconciliation
- Accounts Payable Automation
- Employee Expenses
- Multi-Currency (1-3 currencies)

- Intercompany transactions
- Multiple database/entity consolidation

Advance
Everything in Expand, plus:

- Customer Management CRM
- RFM Analysis
- Business Health Dashboard
- Advanced Analytics - Management Reporting, Benchmarking, Cashflow Forecasting

Optional Add-Ons (All Tiers)

- **HR & Talent:** People management, performance, absence, recruitment, learning, reward and recognition
- **Project Accounting:** Project management, timesheets, sales requests, project dashboards

2 Onboarding

Getting Started

The Access Evolve suites are delivered using a combination of our Access Implementation Methodology (AIM) and Flightpath Methodology.
An overview of the services can be found via the following links:

- Services for Access Evolve Grow Suite
- Services for Access Evolve Expand Suite
- Services for Access Evolve Advance Suite

Implementation includes:

- Dedicated Project Manager
- Dedicated Solution Architect
- Documented Confirmation of Requirements (COR)
- System configuration to COR
- Data migration support
- User training (remote delivery)
- User Acceptance Testing environment
- Go-live support
- Handover to Customer Success team and Support Organisations

Typical implementation timescale is dependent on the Suite being implemented and specific scope. However, the below timescales are indicative (assuming customer availability)

Grow: 3 Month
Expand: 4 Months
Advance: 5 Months

Access Implementation Methodology (AIM)

Our consultants follow a 4-phase, 12-step process and we propose a scale of project, management and administration that's appropriate for your specific needs. From evaluation, planning and design, through to implementation of your business solution.

Phase 1, Pre-project planning

Step 1: Needs analysis

After detailed consultation we will clearly define your needs in a proposal document that identifies the benefits you will experience by updating your systems.

Step 2: Solutions demonstration
We will take you through a tailored demonstration of your proposed solution and work with you to agree which elements will be included in the initial project. We listen and take account of all your feedback and will provide a quotation outlining the anticipated cost of your project.

Step 3: Sales handover
Having finalised the project's scope and agreed commercial terms, we prepare a handover document from sales to the project team who will partner you throughout implementation. They will meet with all appropriate members of your team to ensure continuity throughout the process.

Phase 2, Configure & Install

Step 4: Definition
The Access project team will work with you to define the structure and control processes that will guarantee the success of your project. Documents that we provide you at this stage will cover all your project objectives, the full specification and success criteria. This gives total clarity over individual tasks and responsibilities to ensure you're fully informed going forward.

Step 5: Solutions workshops
This step helps your project team become fully immersed in the proposed software. We map business processes to functionality so that you can understand how the solution will look and feel.

Step 6: Confirmation of requirements
Following your feedback from the solutions workshops, we will confirm the detailed actions and solution components necessary to meet the project success criteria we identified earlier.

Phase 3, Training

Step 7: Configuration
The components identified in Step 6 are delivered and a User Acceptance Test (UAT) system is built ready for you to carry out a pilot test. We configure and tune all the variables within the system to match your specific requirements.

Step 8: User Acceptance Test (UAT)
The UAT is conducted in a workshop environment for your staff against an agreed test plan. At the end of this step you will be ready to go live.

Step 9: Education
With a fully designed, installed and tested system now in place, we will train your staff on all relevant areas of the software. We are highly skilled at adapting our training to the learning styles of each of your staff members. We can train all of your staff or, if preferred, we will train your in-house.

Phase 4, Support

Step 10: Go Live
The test system is converted into a live working environment ready for the processing of real-time business transactions. This is managed by a pre-agreed Go Live check list to ensure all possible circumstances are considered and addressed. We will be on-site to answer your questions and support your users throughout this time, helping them to get maximum clarity and impact from the software as they become increasingly confident.

Step 11: Support handover
We prepare a handover document and deliver it to our ongoing support team. This document contains all the information our support consultants need to answer any future queries you may have.

Step 12: Post project review
Your experience is extremely important to us. Shortly after you Go Live we will request feedback on your experience of the implementation process to help us further refine our delivery processes. We then agree sign-off for the project.

3 Additional Service Options

The table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

FinOps Sales Requests	Income generation: Bill chargeable work promptly and accurately, by enabling the wider business to raise sales invoice/order requests, passing through an optional, audited approval flow. Choose from multiple billing types – project milestone, % fee, Work-in-Progress billing or manual - within a single project or for non-project related sales. 2 Approver levels are included, and approval is at request value level only.

FinOps Project Management	Project Costing: Keep track of projects, milestones, budgets vs actuals, resource allocation and much more. Create projects/budgets using flexible project commencement, with an optional approval flow.
FinOps Timesheets	Project Costing: Keep track of projects, milestones, budgets vs actuals, resource allocation and much more. Create projects/budgets using flexible project commencement, with an optional approval flow
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve. Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

4 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 2 support plans as detailed below.

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 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.

5 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 specialising 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.

6 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

All backups are stored on disk and are retained for a period of 12 Months, financial data is kept for 7 years.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months
Monthly	1 year for non-financial data /7 years for financial data

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Standard Restore Testing
We undertake a restore test automatically on a weekly basis.

DR Testing
We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

SQL Server
SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server
In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours.

Single Virtual Machine Failure – SQL Server
In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours.

Complete Primary Datacentre Outage
In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

7 Business Continuity

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

8 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.

9 Development Life Cycle

Each module in the Evolve Suites 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 (usually every quarter) with all companies benefitting at the same time.

10 Technical Requirements

The Access Evolve Suite runs on any computer or mobile device with a browser and Internet connectivity.

Web Browsers
Microsoft Edge, Firefox, Safari, Google Chrome

Mobile Devices
IOS, Android

11 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.