Microsoft

Common Access solutions

Line-of-business operations

Nonprofit fundraising

Track inventory

Customer support

Manage school registration
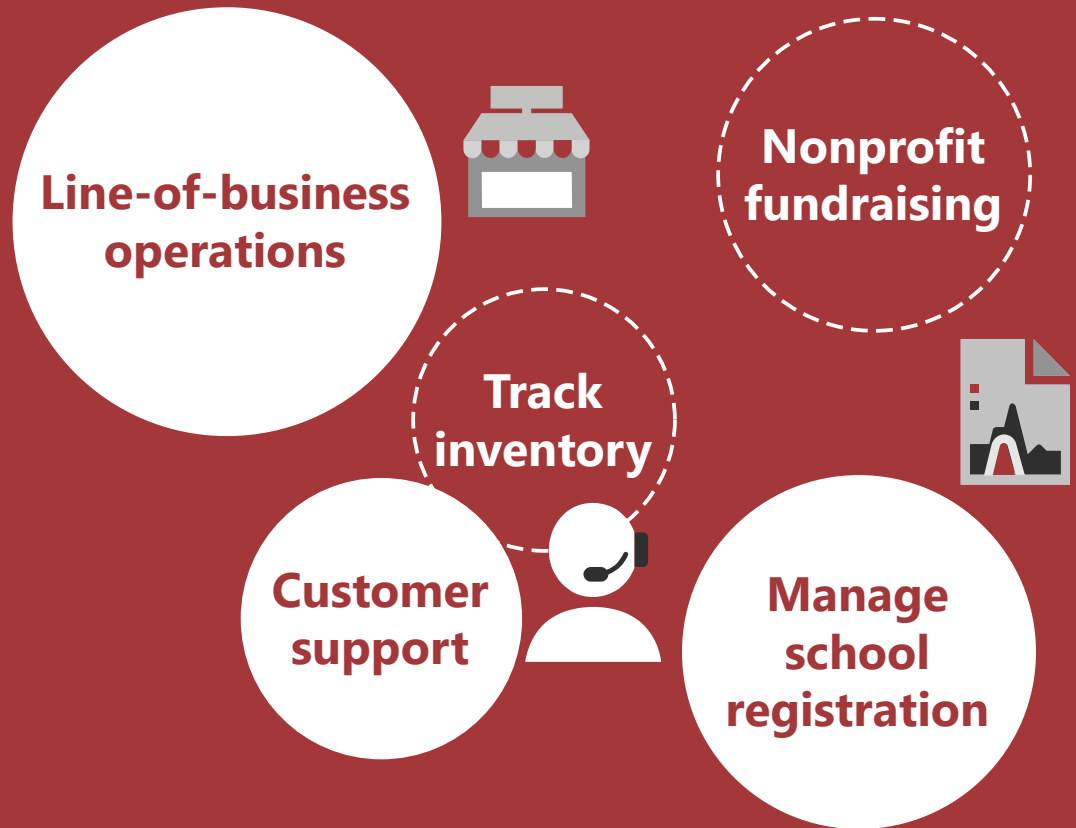
Data is the lifeblood of any business, no matter how big or small.

Efficiently capturing, reporting, viewing, filtering, sharing, and securing data is so vital, that it's a recognized competitive advantage.

What follows are five common business solutions that exemplify how Access helps ensure your business can not only survive, but also thrive.
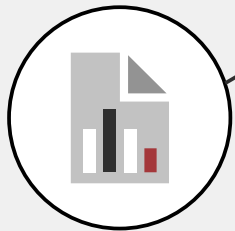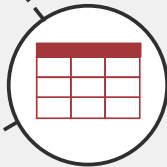
Line of business operations
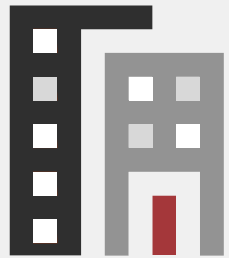
Streamline day-to-day functions and tasks for a small business or corporate department

- ✓ Take customer orders
- ✓ Replenish inventory
- ✓ Purchase items
- ✓ Update supplier details

Line of business operations

Authenticate users with a password

Select Employee:

Jan Kotas | Login

Jan Kotas

Easily filter for and create a desired sales report

Print   Preview   Close

Select Sales Report

Sales By Category
Sales By Country
Sales By Customer
Sales By Employee
Sales by Product

Filter Sales Items...

Select Sales Period

Monthly Sales
Quarterly Sales
Yearly Sales

Year   2019

Quarter   3rd Quarter

Month   September

Create a customer order

| Customer | Company A | Salesperson | Andrew Cencini |
| E-mail Address | | Order Date | 9/18/2019 |

Order Details | Shipping Information | Payment Information   ——— Organize form sections with tabs

Product	Qty	Unit Price	Discount	Total Price	Status
Northwind Traders Coffee	2	$46.00	0.00%	$92.00	No Stock
Northwind Traders Green Tea	4	$2.99	0.00%	$11.96	Allocated
Northwind Traders Cherry Pie Filling	5	$2.00	0.00%	$10.00	On Order
*					
Total	11			$113.96	

Track status with conditional formatting

Auto-calculate with expressions

Line of business operations (continued)
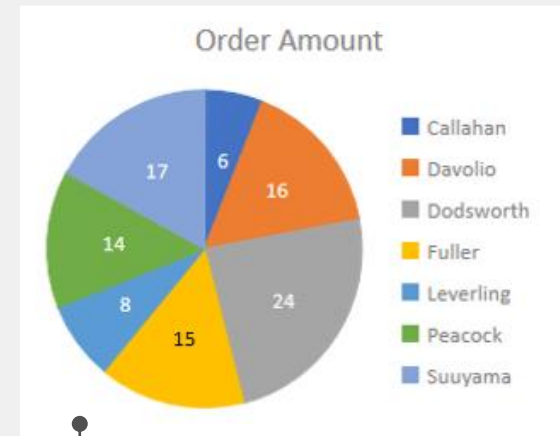
Print or email customer invoices

Ship To:			Bill To:		
Invoice #			Sales person		
Order Date			Customer		
Date Shipped			Ship Via		

Product ID	Product Name	Quantity	Unit Price	Discount	Price
43	Northwind Traders Coffee	2	$46.00	0%	$92.00
81	Northwind Traders Green Tea	4	$2.99	0%	$11.96
91	Northwind Traders Cherry Pie Filling	5	$2.00	0%	$10.00
				Invoice Total	$113.96
				Freight	$0.00

Maintain inventory: create, read, update, and delete

Product Code ▾	Product ▾	Cost ▾	List Price ▾	Reorder ▾	Quantity Per Unit ▾
NWTB-1	Chai	$13.50	$18.00	10	10 boxes x 20 bags
NWTCO-3	Syrup	$7.50	$10.00	25	12 - 550 ml bottles
NWTCO-4	Cajun Seasoning	$16.50	$22.00	10	48 - 6 oz jars
NWTO-5	Olive Oil	$16.01	$21.35	10	36 boxes
NWTJP-6	Boysenberry Spread	$18.75	$25.00	25	12 - 8 oz jars
NWTDFN-7	Dried Pears	$22.50	$30.00	10	12 - 1 lb pkgs.

Create charts

Order Amount

Compare orders between each salesperson

Quarterly Sales
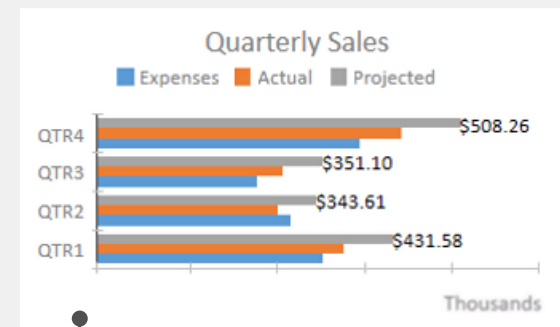
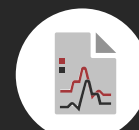Track sales by quarter

Enhance:

Handle forgotten passwords   Report gross profits   Add aging report of unpaid customers

Track inventory

Keep track of products, such as grocery store items, boutique clothing, and sporting goods hardware.

- ✔ Know what's on hand
- ✔ Minimize back orders
- ✔ Avoid over-stocking
- ✔ Keep popular items in stock

View a supplier

Click command buttons for convenient tasks

B ...and then **drill down** to see **products supplied**

Click a tab for specific information

New Supplier	Collect Data via E-mail	Add From Outlook	E-mail List
9 Supplier I	Mikael	Sandberg	Sales Manager
4 Supplier D	Naoki	Sato	Marketing Manager
10 Supplier J	Luis	Sousa	Sales Manager
2 Supplier B	Cornelia	Weiler	Sales Manager
(New)			

A Click the **ID number** link...

Luis Sousa

Go to | E-mail Supplier | Create Outlook Contact

General **Products** Purchases

ID	Category	Product	Price
3	Condiments	Northwind Traders Syrup	$10.00
4	Condiments	Northwind Traders Cajun Seasoning	$22.00
5	Oil	Northwind Traders Olive Oil	$21.35
48	Candy	Northwind Traders Chocolate	$12.75
77	Condiments	Northwind Traders Mustard	$13.00

Track inventory (continued)

Filter datasheets/forms and then save the filters

| Filter Favorites		
Save Filter 💾	(Clear Filter)	
	(Manage Filters)	
	This Week's Additions	
	Today's Transactions	
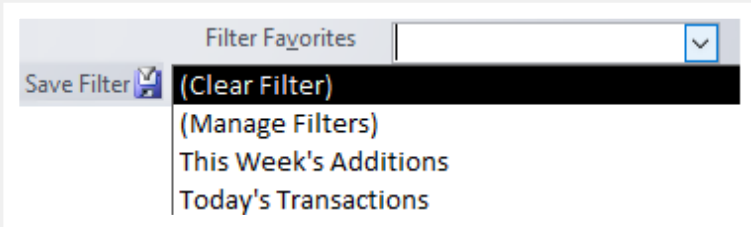
Who are the top suppliers?

Wednesday, September 18, 2019   2:44:28 PM

Top 10 Biggest Orders

#	Invoice #	Order Date	Company	Sales Amount
1	41	3/24	Company G	$13,800.00
2	38	3/10	Company BB	$13,800.00
3	47	4/8	Company F	$4,200.00
4	46	4/5	Company I	$3,690.00
5	58	4/22	Company D	$3,520.00
6	79	6/23	Company F	$2,490.00
7	77	6/5	Company Z	$2,250.00
8	36	2/23	Company C	$1,930.00
9	44	3/24	Company A	$1,674.75
10	78	6/5	Company CC	$1,560.00

Process to restock items below minimum level
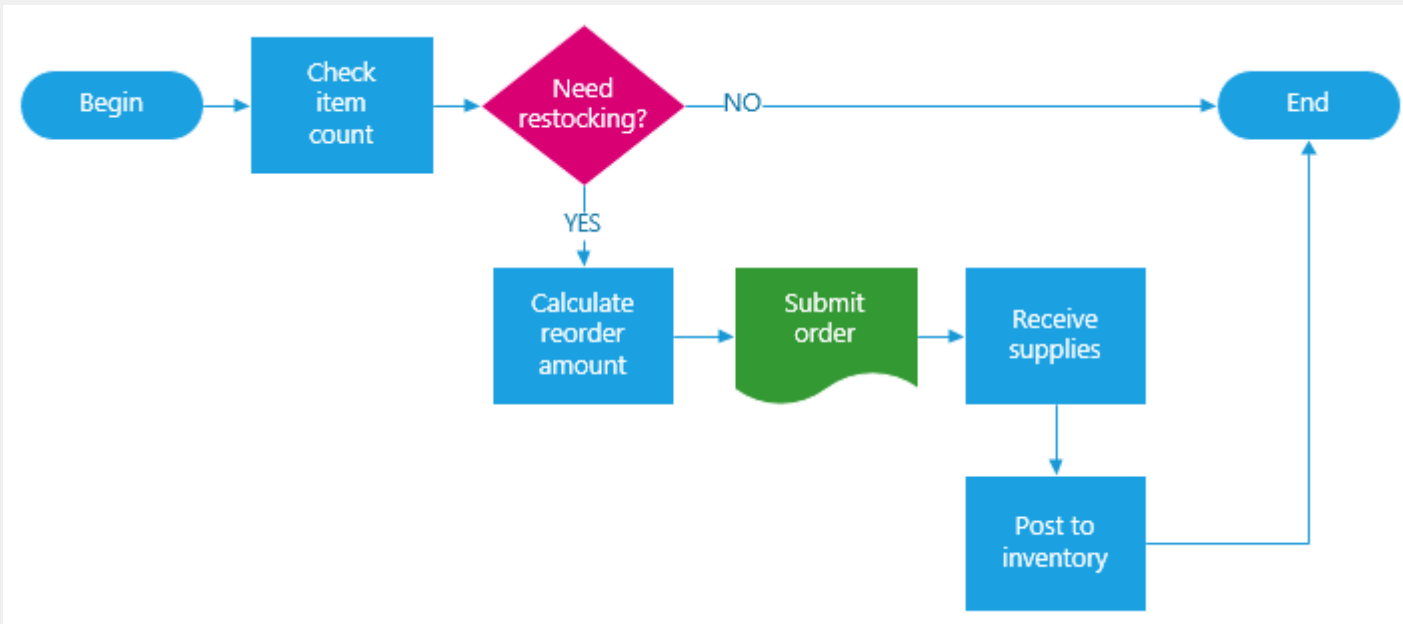
Track inventory (continued)

Which products have a quantity under 20?

Inventory Transactions   Wednesday, September 18, 2019
   3:16:02 PM

ID	Product ID	Quantity
63	Northwind Traders Dried Plums	30
64	Northwind Traders Dried Pears	10
65	Northwind Traders Dried Apples	10
66	Northwind Traders Dried Plums	10
67	Northwind Traders Chai	10
68	Northwind Traders Coffee	20
69	Northwind Traders Chocolate Biscuits Mix	20
70	Northwind Traders Chocolate	10
71	Northwind Traders Curry Sauce	10
73	Northwind Traders Green Tea	200
75	Northwind Traders Chocolate	100
77	Northwind Traders Coffee	300
79	Northwind Traders Clam Chowder	200
81	Northwind Traders Chocolate Biscuits Mix	30
83	Northwind Traders Beer	100
84	Northwind Traders Boysenberry Spread	10

Page 2 of 4

For items over 50, what's on hand?

Inventory ID	Quantity	Status ID
73	200	Invoiced
75	100	Invoiced
77	300	Invoiced
79	200	Invoiced
83	100	Invoiced
101	100	Invoiced
104	300	Allocated
108	300	Invoiced
117	87	Invoiced
121	90	Invoiced
Total	**1777**	

Enhance:

Add barcode input   Put back orders on invoice   Validate quantity discounts   Print packing list

Customer support

Organize support details, issues, employee assignments, escalations, and resolutions

- ✓ Capture support case details
- ✓ Track reminders
- ✓ Analyze support issues
- ✓ Resolve issues

Click on Reports to get list of **predefined reports**

Case Details
Closed Cases
Customer Address Book
Customer Phone List
Employee Address Book
Employee Phone List
Open Cases
Open Cases by Assigned To
Open Cases by Category
Open Cases by Status
Overdue Cases

Quickly enter and view details from one convenient form

Useful **command buttons**

| Save and New | E-mail | Print | Reports | ⌄ | Close |

Title | | ID | (New)

Assigned To
Customer
Opened By
Opened Date | 19-Sep-19
Due Date

Priority | (2) Normal
Category | Premium
KB
Status | Active
Resolved Date
Attachments | 📎(0)

Default values **speed data capture**

Attach related documents

Case Information | Related Cases | Calls

Call Time	Caller	Notes
9/19/2019 10:23:37 AM		

Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 1 2 3 4 5
6 7 8 9 10 11 12
Today

Easily add **date and time** with the date picker control

Enhance:

Generate case histories

Send surveys and chart answers

Create knowledge base articles

Nonprofit fundraising

Nonprofits live and breathe by their donors and regular fund drives support their goals

- ✔ Know generous donors
- ✔ Keep contacts up-to-date
- ✔ Track campaign success
- ✔ Automate mailings

Capture, view, and update all campaign details

Click buttons for **key reports**

Report Events   Report Donations   Report Pledges

Name *

Click tabs for
more information

Campaign Details   Campaign Events   Campaign Donations

Owner: Launch Date:
Status: Deadline:
Description:

Fundraising Goal: $0.00   Amount Raised: $0.00   **Track progress** instantly

Clean data (name changes, moves, duplicates, and so on)

To	Use the
Remove duplicate data	Find Duplicates Query Wizard
Spell check	Spell checker
Change case	LCase and UCase functions
Remove spaces	Trim functions
Manipulate strings	Left, Len, Mid, Replace, Right functions
Convert values	Type Conversion functions

Customize mailing labels
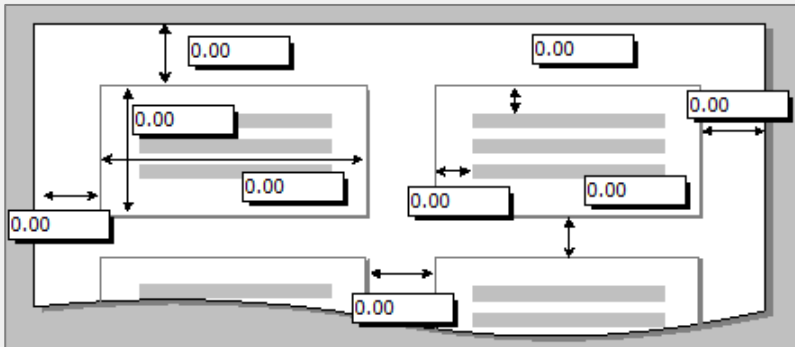
Create mailing labels

Jeffery Madera
13 Main ST
Washington WA, 33301

Marylou Saunders
6 Lake RD
Lebanon MT, 10003

Hilary Bullock
12 Third AVE
Bristol AZ, 11530

Kelvin Moorman
3 Forest AVE
Springfield OR, 2150

Marquita Berry
2 King Lane
Clinton MA, 10011

Son Clouse
10 First BLVD
Fairview WA, 10013

Enhance:

📅 View upcoming events 📕 Send event flyers 📄 Merge data with Word to print form letters

Manage school registration

Manage course schedules, class assignments, attendance, and procedures

- ✓ Capture class details
- ✓ Email confirmations
- ✓ Handle changes and cancellations
- ✓ Process waiting lists

View and update all student information at a glance

Switch to another student by using a lookup from a **dropdown list.**

Student Name
Aida Richardson
Candice Puckett
Concetta Mendoza
Danielle McCoy
Darin Slayton
Dolly Pennington
Eddie Timm
Fred Surratt
Hilary Bullock
Jane Daugherty

Go to [ ] ▼   Save and New   E-mail

General | Guardian Information | Medical Information | Attendance

First Name: Marquita
Last Name: Berry
Student ID: 345
Level: 3rd Grade ▼
Room: 23

Edit Picture

Date of Birth: 3/4/2012
Special Circumstances: Peanut allergy ▼

Notes

Recently moved
Chess champion

Click to Map

Street: 2 King Lane

Select from a list of values and even add to the list using the **Edit icon.**

- ☑ Peanut allergy
- ☐ Requires daily medication
- ☐ Heart condition

OK   Cancel

Display a **Bing map** of the student's home address
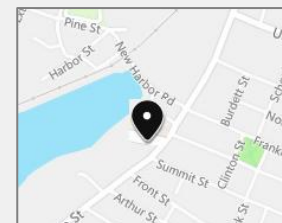
Enhance:

📋 Print course catalogs   📅 Schedule course changes   📞 Contact substitute teachers

Resources

Reports
Guide to designing reports
Introduction to reports in Access
Create mailing labels in Access
Use mail merge to send Access data to Word
Use conditional formatting on reports
Distribute a report
Create a grouped or summary report
Summing in reports

Forms
Create a chart on a form or report
How to synchronize combo boxes
Highlight data with conditional formatting
Create a form in Access
Create a form that contains a subform
Use a command button to start an action

Using templates
Cut expenses and manage inventory
Modify a new database created from a template
Learn how to modify your new database
Featured Access templates
Goods database

Specific templates
Inventory
Faculty
Students
Customer Service
Call tracker
Northwind
Charitable contributions
Asset tracking

Expressions
Choose the right date function
String functions and how to use them
Restrict data input by using validation rules

For more information, see

support.office.com/access