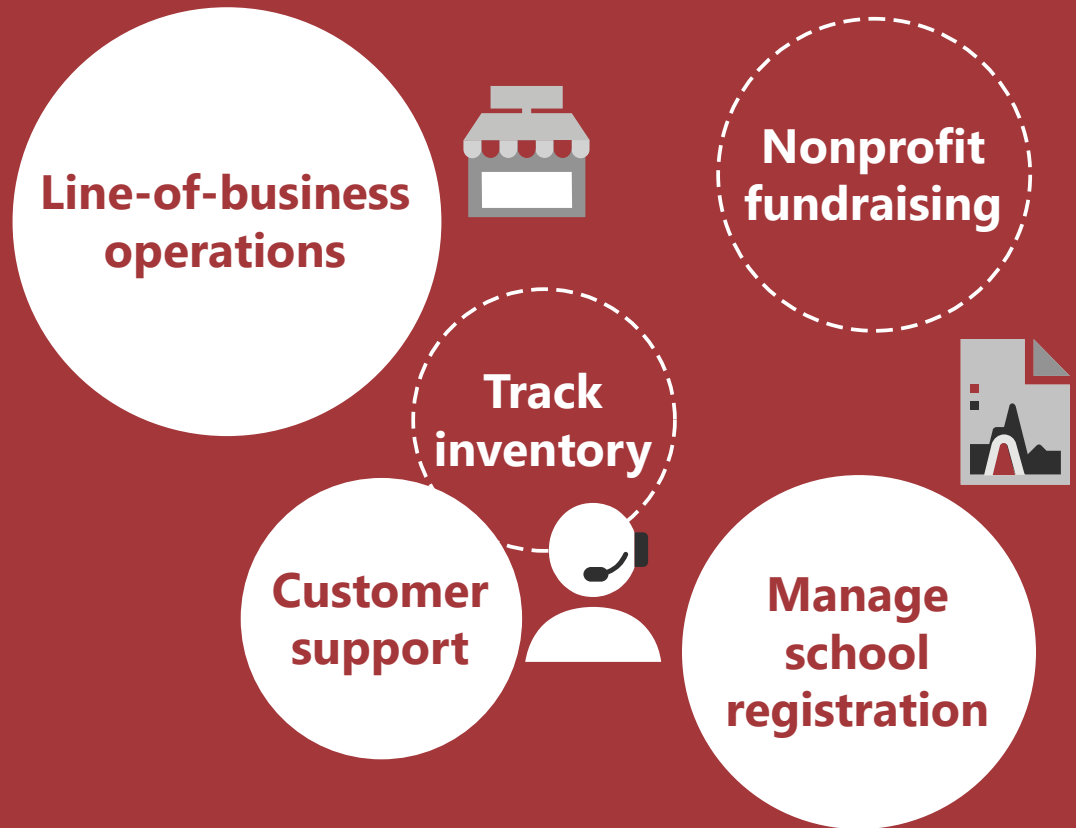


Common Access solutions



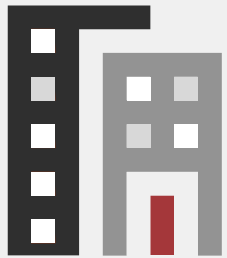
**Data is the lifeblood of any business,
no matter how big or small.**

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.

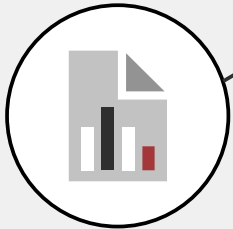
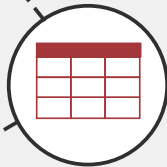


Line of business operations



Streamline day-to-day functions and tasks for a small business or corporate department

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



Line of business operations

Authenticate users with a password

Select Employee:

Jan Kotas

Jan Kotas

Login

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

Select Sales Period

Monthly Sales
Quarterly Sales
Yearly Sales

Filter Sales Items...

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

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	

Organize form sections with tabs

Track status with conditional formatting

Auto-calculate with expressions

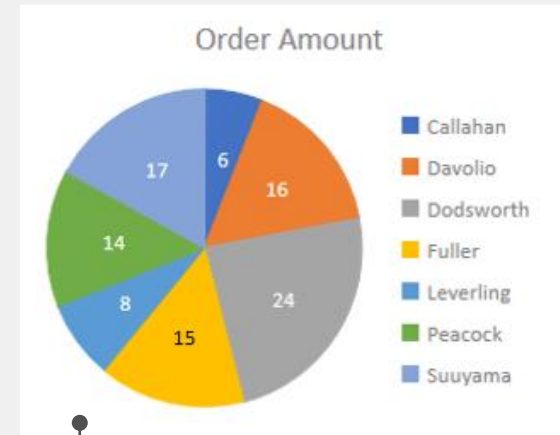
Line of business operations (continued)

Print or email customer invoices

Ship To:	<input type="text"/>	Bill To:	<input type="text"/>
Invoice #	<input type="text"/>	Sales person	<input type="text"/>
Order Date	<input type="text"/>	Customer	<input type="text"/>
Date Shipped	<input type="text"/>	Ship Via	<input type="text"/>

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

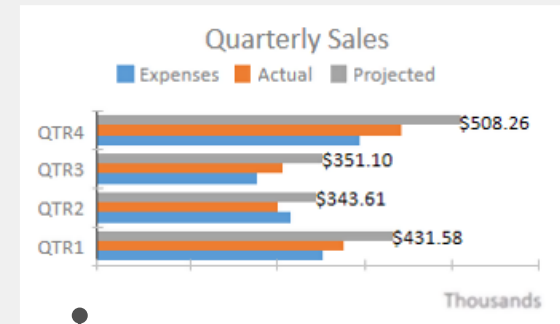
Create charts



Compare orders between each salesperson

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
NWTFN-7	Dried Pears	\$22.50	\$30.00	10	12 - 1 lb pkgs.



Track sales by quarter

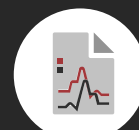
Enhance:



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

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

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

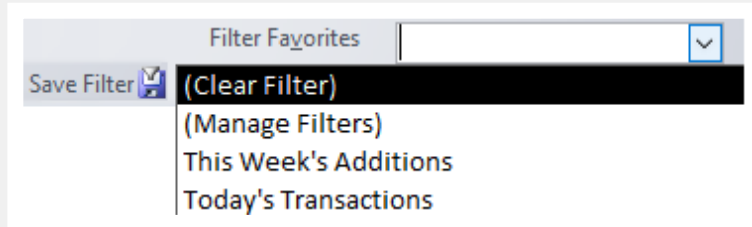
B ...and then **drill down** to see **products supplied**

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

Click a **tab** for specific information

Track inventory (continued)

Filter datasheets/forms and then save the filters



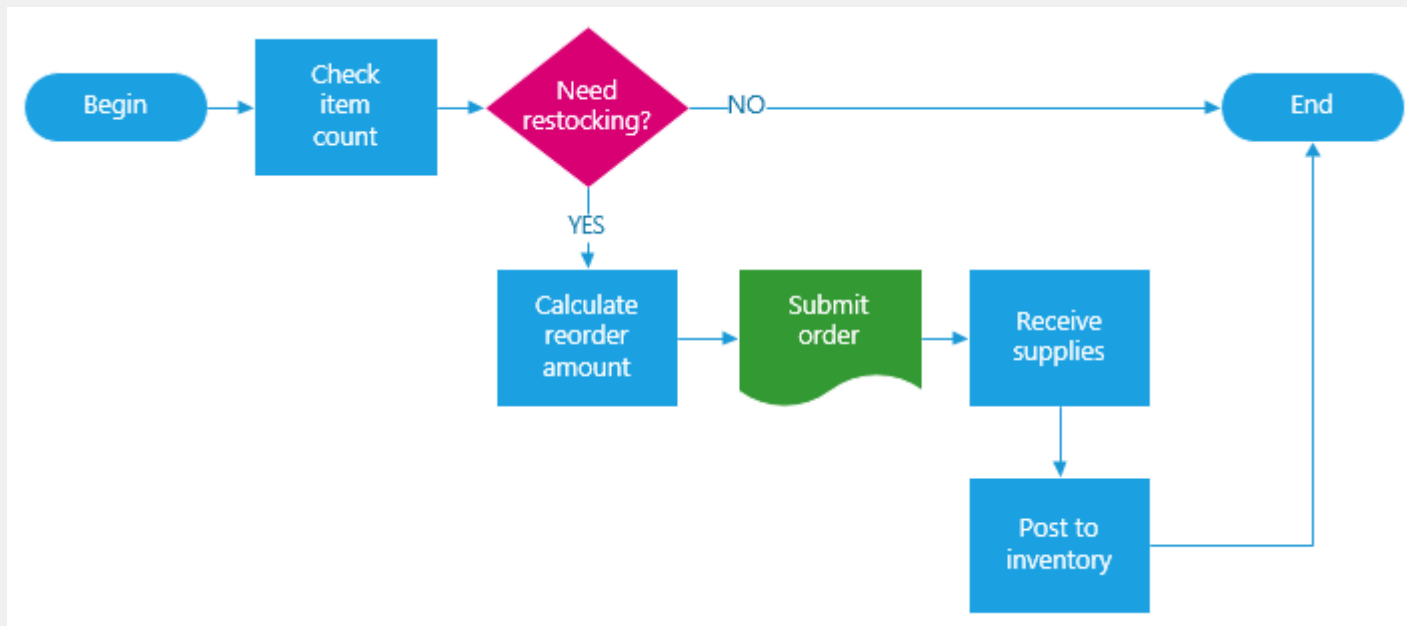
Who are the top suppliers?

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**

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: Priority: (2) Normal

Customer: Category: Premium

Opened By: KB:

Opened Date: 19-Sep-19 Status: Active

Due Date: Resolved Date:

Attachments: 0(0)

Case Information | Related Cases | Calls

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

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

Default values **speed data capture**

Attach related documents

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

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**

Click tabs for **more information**

Track progress instantly

The screenshot shows a web application for managing fundraising campaigns. At the top, there are three report buttons: 'Report Events', 'Report Donations', and 'Report Pledges'. Below these is a 'Name' input field. A tabbed interface follows, with 'Campaign Details' selected, and 'Campaign Events' and 'Campaign Donations' as options. The 'Campaign Details' tab contains fields for 'Owner' and 'Status' (both dropdown menus), 'Launch Date' and 'Deadline' (date inputs), and a 'Description' text area. At the bottom, there are two monetary fields: 'Fundraising Goal' and 'Amount Raised', both showing '\$0.00'. Annotations with arrows point to the report buttons, the tabs, and the monetary fields.

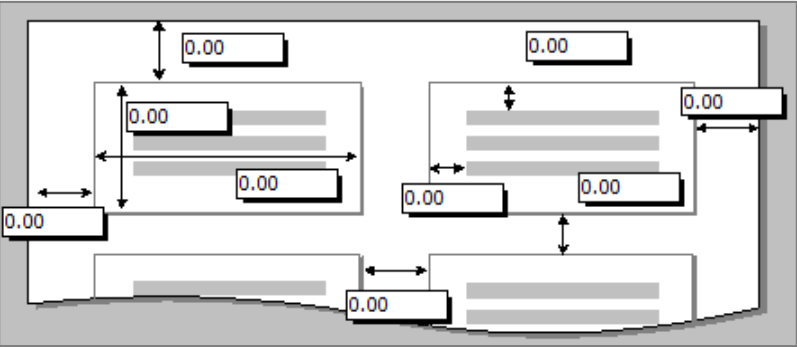
Report Events		Report Donations		Report Pledges	
Name *					
Campaign Details Campaign Events Campaign Donations					
Owner:		Launch Date:			
Status:		Deadline:			
Description:					
Fundraising Goal:		\$0.00	Amount Raised:	\$0.00	

Nonprofit fundraising (continued)

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	Kelvin Moorman 3 Forest AVE Springfield OR, 2150
Marylou Saunders 6 Lake RD Lebanon MT, 10003	Marquita Berry 2 King Lane Clinton MA, 10011
Hilary Bullock 12 Third AVE Bristol AZ, 11530	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



Edit Picture

First Name

Marquita

Last Name

Berry

Student ID

345

Level

3rd Grade

Room

23

Date of Birth

3/4/2012

Special Circumstances

Peanut allergy

Street

2 King Lane

Notes

Recently moved Chess champion

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

☒ Peanut allergy

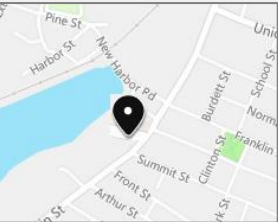
☐ Requires daily medication

☐ 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