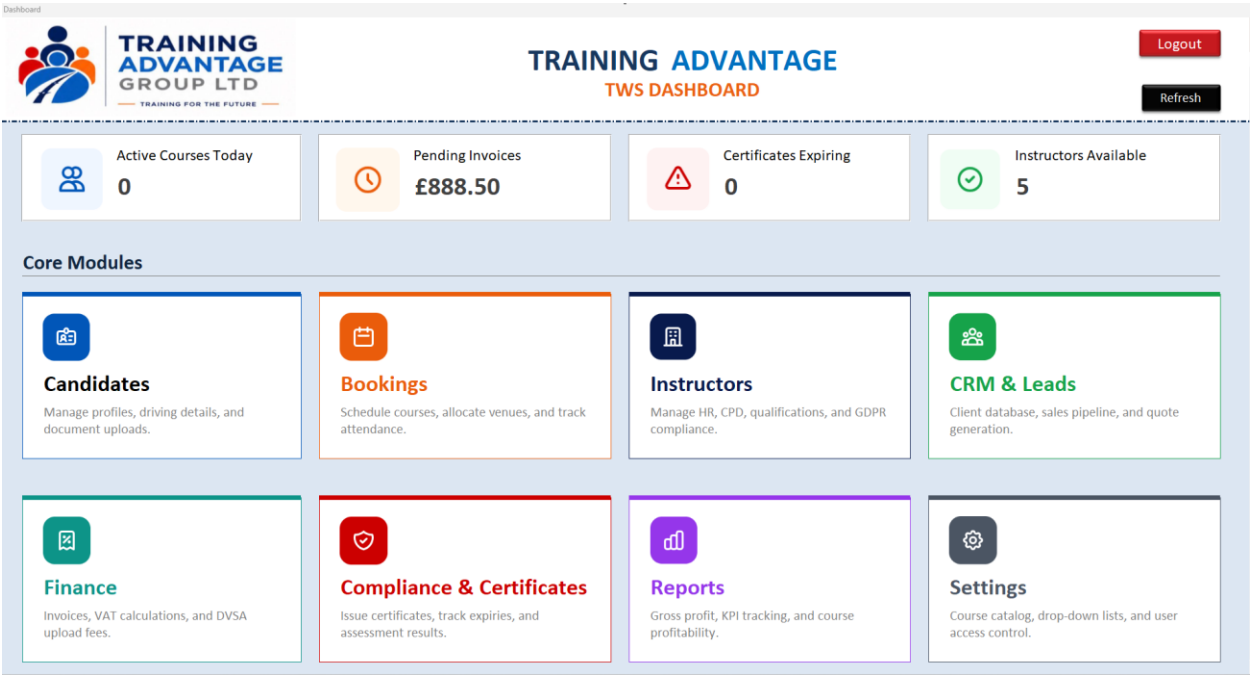


Enterprise Training & Compliance Management System (TMS)

Admyon Systems

Building Smarter Business Solutions



Project Overview

The Enterprise Training & Compliance Management System is a robust desktop ERP developed specifically for training academies and corporate educational groups. It serves as a unified platform to manage the entire candidate lifecycle, encompassing lead generation (CRM), course scheduling, financial invoicing, instructor allocation, and rigorous compliance tracking for professional certifications.

Business Problem

Training organizations and academies operating in regulated sectors face strict compliance audits. Relying on disconnected spreadsheets to manage sales pipelines, course bookings, instructor availability, and expiring certifications creates massive operational bottlenecks. This fragmentation leads to lost sales leads, overdue invoices, scheduling conflicts, and severe compliance risks due to untracked or expired candidate certifications.

Our Solution

Admyon Systems developed a centralized, end-to-end management application that replaces manual paperwork with a fully automated workflow. The system seamlessly connects a CRM pipeline with the core booking engine and financial ledger. It tracks candidate assessments in real-time and automates the generation of official certificates, ensuring the academy remains audit-ready and operationally efficient at all times.

Key Features

- Tiled KPI Dashboard (Active Courses, Pending Invoices, Expiring Certs)
- Integrated CRM & Sales Lead Pipeline
- Candidate Profile & Booking Management
- Automated Compliance & Master Certificate Register
- One-Click PDF Certificate Generation
- Financial Invoicing & Debtors Tracking
- Reporting Hub (Gross Profit, Attendance Rates, Expiring Certs)

Technologies Used

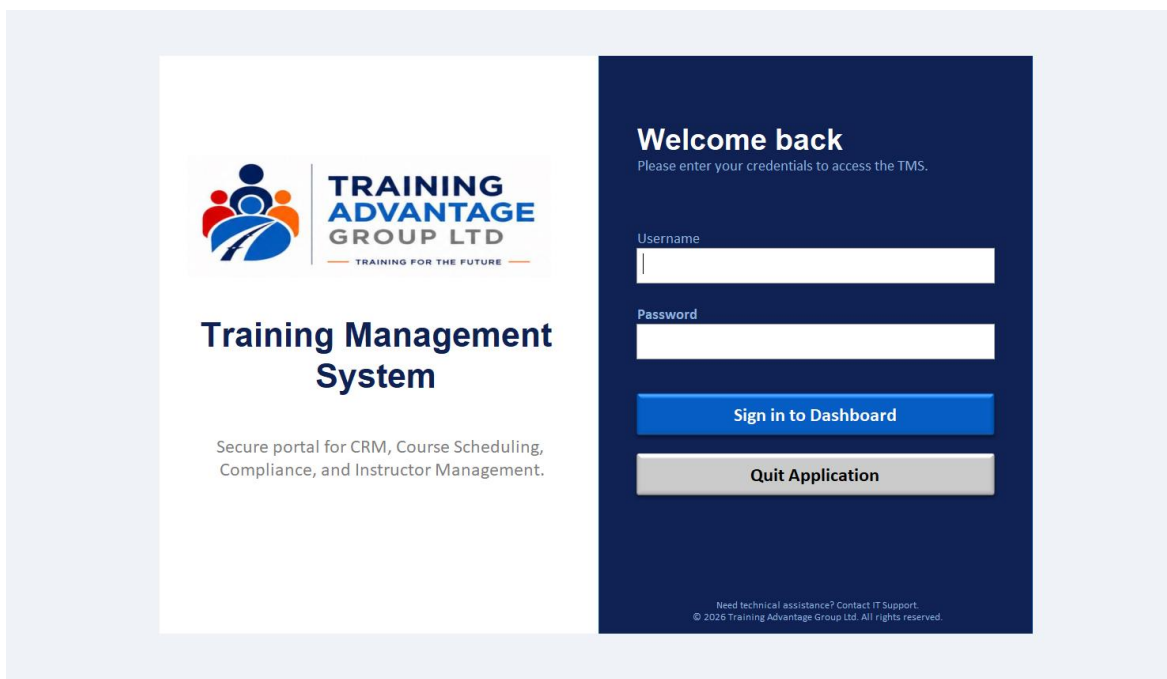
Technology	Used
Microsoft Access	✓
VBA (Visual Basic for Applications)	✓
SQL	✓

System Modules

- Secure Login Portal
- TWS Dashboard
- Candidates
- Bookings
- Instructors
- CRM & Leads
- Finance
- Compliance & Certificates
- Reporting Hub
- Settings

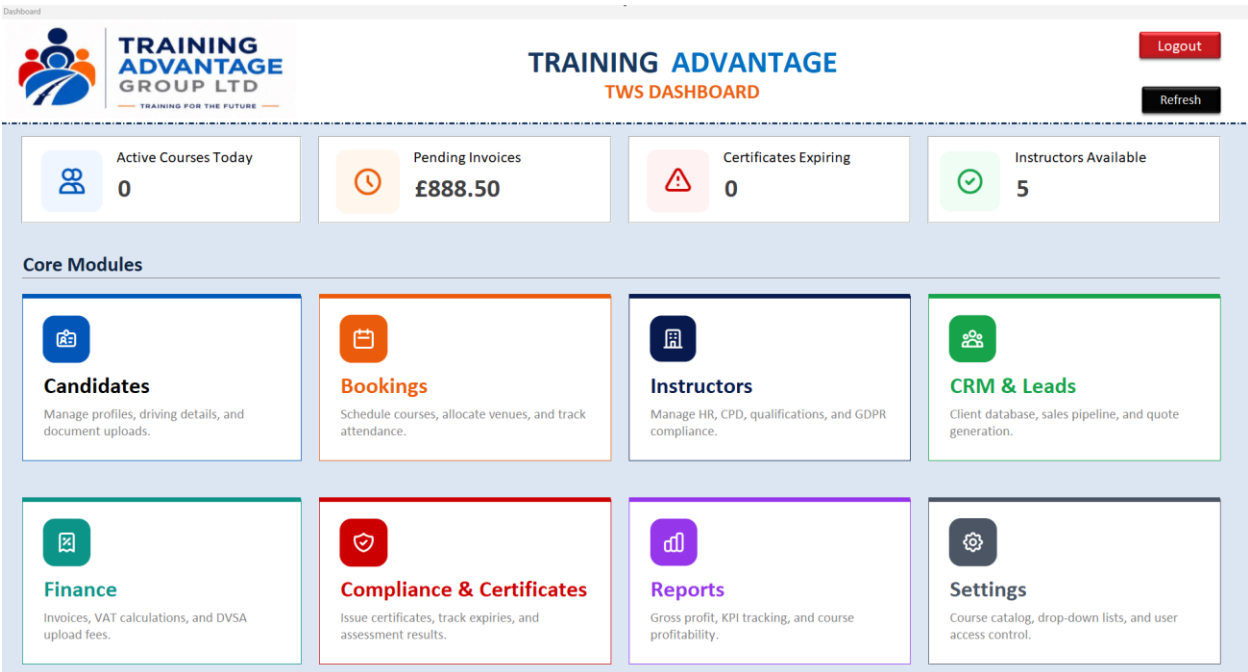
Screenshots

System Login Portal



A branded, secure entry point ensuring that sensitive candidate data and financial records are protected by strict access credentials.

Central Operations Dashboard



A modern, tile-based command center displaying live operational KPIs, giving management instant visibility into active courses, revenue, and compliance alerts.

CRM & Leads Pipeline

Manage CRM & Leads

[< Back](#)

CRM & Leads Pipeline

[Refresh](#)

Status

Filter

Clear

+ New Inquiry

DATE	CLIENT	COURSE INTEREST	QUOTE	Status	Actions
6/2/2026	Alpha Logistics	HGV Practical	£2,053.00	Won	Convert To Booking Edit Delete
6/3/2026	BrightCare Ltd	Transport Manager CPC	£2,244.00	Won	Convert To Booking Edit Delete
6/4/2026	NorthBuild	ADR Dangerous Goods	£1,103.00	Quoted	Convert To Booking Edit Delete
6/5/2026	SafeWorks UK	Transport Manager CPC	£817.00	Contacted	Convert To Booking Edit Delete
6/6/2026	Prime Security	ADR Dangerous Goods	£2,424.00	New Lead	Convert To Booking Edit Delete
6/7/2026	City Foods	ADR Dangerous Goods	£636.00	Negotiating	Convert To Booking Edit Delete
6/8/2026	Vision Tech	Transport Manager CPC	£824.00	Quoted	Convert To Booking Edit Delete
6/9/2026	Care Plus	Driver CPC Periodic Training	£1,103.00	Contacted	Convert To Booking Edit Delete
6/10/2026	Metro Services	Transport Manager CPC	£907.00	Negotiating	Convert To Booking Edit Delete
6/11/2026	Rapid Transport	Transport Manager CPC	£1,525.00	Won	Convert To Booking Edit Delete
6/12/2026	Green Solutions	Transport Manager CPC	£654.00	Contacted	Convert To Booking Edit Delete
6/13/2026	Industrial Hub	Transport Manager CPC	£542.00	New Lead	Convert To Booking Edit Delete
6/14/2026	BlueWave Ltd	Transport Manager CPC	£1,515.00	Negotiating	Convert To Booking Edit Delete
6/15/2026	PaperWorks	HGV Practical	£2,462.00	Negotiating	Convert To Booking Edit Delete
6/16/2026	Global Traders	ADR Dangerous Goods	£2,309.00	Contacted	Convert To Booking Edit Delete
6/17/2026	West Medical	Transport Manager CPC	£531.00	Quoted	Convert To Booking Edit Delete
6/18/2026	Skyline Group	Transport Manager CPC	£525.00	New Lead	Convert To Booking Edit Delete
6/19/2026	FreshMart	ADR Dangerous Goods	£1,188.00	Negotiating	Convert To Booking Edit Delete
6/20/2026	Elite Manufacturing	Transport Manager CPC	£2,300.00	Contacted	Convert To Booking Edit Delete

A dedicated sales module allowing the team to track prospective clients, manage quotes, update negotiation statuses, and convert successful leads directly into active bookings.

Booking & Candidate Management

Manage Bookings

< Back

Manage Bookings

Refresh

Search by Ref, Candidate or Company

Payment Status

Course Date

All Statuses

All Dates

Filter

Clear

+ New Booking

REF #	CANDIDATE NAME	COURSE / EXAM	COMPANY NAME	BOOKING DATE	PAYMENT STATUS	Actions
BK20260001	Ava Hughes	HGV Practical	Cardiff Logistics Ltd	7/1/2026	Pending	View / Edit Delete
BK20260002	Ava Hughes	HGV Practical	Cardiff Logistics Ltd	7/1/2026	Invoiced	View / Edit Delete
BK20260003	Noah Evans	Driver CPC Periodic Training	Leeds Logistics Ltd	7/1/2026	Paid	View / Edit Delete
BK20260004	Oliver Brown	Transport Manager CPC	Glasgow Logistics Ltd	7/1/2026	Overdue	View / Edit Delete
BK20260005	Emily Johnson	Driver CPC Periodic Training	Leeds Logistics Ltd	7/1/2026	Pending	View / Edit Delete
BK20260006	Ava Hughes	Emergency First Aid	Cardiff Logistics Ltd	7/1/2026	Invoiced	View / Edit Delete
BK20260007	Jack Davies	Driver CPC Periodic Training	Newcastle Logistics Ltd	7/1/2026	Pending	View / Edit Delete
BK20260008	Amelia Thomas	ADR Dangerous Goods	Liverpool Logistics Ltd	7/1/2026	Pending	View / Edit Delete
BK20260009	Olivia Roberts	HGV Practical	Newcastle Logistics Ltd	7/1/2026	Pending	View / Edit Delete
	Jack Davies	Emergency First Aid	Birmingham Logistics Ltd			View / Edit Delete

A comprehensive scheduling grid to filter and manage candidate course enrollments, track payment statuses, and organize company-sponsored training allocations.

Finance & Invoicing Dashboard

Manage Finance & Invoicing

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Finance & Invoicing Dashboard

Refresh

TOTAL PENDING

£688.50

TOTAL PAID (MONTH)

£1,463.40

OVERDUE INVOICES

£152.75

INVOICE #	COMPANY	REF #	TOTAL	STATUS	Actions
		BKG-267349	£0.00	Pending	Mark as Paid View
		BKG-267349	£0.00	Paid	Mark as Paid View
INV20009	Newcastle Logistics Ltd	BK20260009	£144.00	Pending	Mark as Paid View
INV20008	Liverpool Logistics Ltd	BK20260008	£154.50	Pending	Mark as Paid View
INV20007	Newcastle Logistics Ltd	BK20260007	£144.00	Pending	Mark as Paid View
INV20006	Cardiff Logistics Ltd	BK20260006	£152.75	Invoiced	Mark as Paid View
INV20005	Leeds Logistics Ltd	BK20260005	£144.00	Pending	Mark as Paid View
INV20004	Glasgow Logistics Ltd	BK20260004	£152.75	Overdue	Mark as Paid View
INV20003	Leeds Logistics Ltd	BK20260003	£264.00	Paid	Mark as Paid View
INV20002	Cardiff Logistics Ltd	BK20260002	£205.40	Invoiced	Mark as Paid View
INV20001	Cardiff Logistics Ltd	BK20260001	£102.00	Pending	Mark as Paid View
	Birmingham Logistics Ltd		£0.00		Mark as Paid View

An integrated ledger providing a clear breakdown of pending, paid, and overdue invoices, ensuring optimized cash flow and seamless financial tracking.

Master Certificate Register

Manage Compliance & Certificates

Compliance & Certificates							
Master Certificate Register							
Search Name or Cert #		Compliance Status		Filter	Clear	Refresh	
CANDIDATE NAME	COURSE ASSESSMENT	EXPIRY DATE	Certificate #	Assessor Comments	PRACTICAL RESULT	STATUS	Actions
Ava Hughes	HGV Practical	8/20/2031	CERT260001	Competent performance	Pass	OK	Save Issue Cert
Ava Hughes	HGV Practical	8/20/2031	CERT260002	Competent performance	Pass	OK	Save Issue Cert
Noah Evans	Transport Manager CPC	8/20/2031	CERT260003	Competent performance	Referred	OK	Save Issue Cert
Oliver Brown	Emergency First Aid	8/20/2031	CERT260004	Competent performance	Pass	OK	Save Issue Cert
Emily Johnson	Transport Manager CPC	8/20/2031	CERT260005	Competent performance	Pending	OK	Save Issue Cert
Ava Hughes	ADR Dangerous Goods	8/20/2031	CERT260006	Competent performance	Pass	OK	Save Issue Cert
Jack Davies	Transport Manager CPC	8/20/2031	CERT260007	Competent performance	Pass	OK	Save Issue Cert
Amelia Thomas	Driver CPC Periodic Training	8/20/2031	CERT260008	Competent performance	Pass	OK	Save Issue Cert
Olivia Roberts	HGV Practical	8/20/2031	CERT260009	Competent performance	Pass	OK	Save Issue Cert

The core compliance module tracking practical results, assessor comments, and expiry dates, functioning as an audit-ready database for all candidate qualifications.

Automated Certificate Generation

TRAINING ADVANTAHGE

GROUP LTD

CERTIFICATE

of Professional Completion

THIS IS TO PROUDLY CERTIFY THAT

Ava Hughes

has successfully completed the required assessments and demonstrated profound competency in the training program entitled:

HGV Practical

Issue Date: 8/20/2026

Valid Until: 8/20/2031

Certificate No: CERT260001

OFFICIAL TAG CERTIFIED

John D. Smith

John D. Smith

Managing Director

A one-click documentation feature that instantly generates official, print-ready PDF certificates for candidates upon successful course completion.

Reporting Hub

Reporting Hub

< Back

Reporting Hub

Global Date Range:

FROM DATE

TO DATE

This Month

Year To Date

Core Business Reports

Financial

Gross Profit Analysis

Calculates total course revenue minus instructor base costs to determine actual profitability by course.

Review Report

Financial

Aged Debtors (Unpaid)

List of all bookings with a 'Pending' or 'Overdue' payment status, grouped by Company/Client.

Review Report

Sales / CRM

Expiring Certificates

Candidates whose CPC or ADR certificates are expiring within the selected date range. Use for remarketing.

Review Report

Operational

Attendance & Pass Rates

Breakdown of course attendance vs no-shows, along with Pass/Fail/Referred ratios for compliance audits.

Review Report

An analytical portal delivering core business reports, including Gross Profit Analysis, Aged Debtors, and Compliance Audit data across selected date ranges.

Business Benefits

- ✓ Ensured 100% regulatory compliance with automated certificate tracking
- ✓ Increased sales conversion rates via a structured CRM pipeline
- ✓ Improved cash flow management through centralized invoicing
- ✓ Reduced administrative workload by automating document generation
- ✓ Centralized all candidate, instructor, and financial data into a single source of truth

Project Highlights

- Automated PDF Generation
- Modern, Tile-Based UI/UX
- End-to-End Workflow (Lead to Certificate)
- Audit-Ready Data Structure
- Customized Financial Tracking

Future Enhancements

Future versions of this system may include:

- Automated email campaigns for candidates with expiring certificates (Remarketing)
- Web-based Candidate Portal for self-service course scheduling and resource downloads
- Integration with online accounting software (e.g., Xero or QuickBooks)
- Digital signature integration for instructors and assessors

Project Summary

This Enterprise Training & Compliance Management System highlights Admyon Systems' ability to deliver comprehensive, enterprise-grade ERP solutions. By merging CRM, finance, and complex compliance tracking into a single, user-friendly interface, the software empowers training organizations to scale operations effortlessly while maintaining strict regulatory standards.