palladium
ACCOUNTING

PROUDLY SOUTH AFRICAN

NEW IN PALLADIUM PREMIUM
ADVANCED END-TO-END BUSINESS FUNCTIONALITY

Palladium Premium brings together advanced end-to-end ERP business functionality in one, cost-effective solution. The Palladium Premium edition includes all of the features of the Palladium Enterprise Edition, and boasts a new modern Interface with enhanced user-definable Business Intelligence and Dashboards. The program boasts advanced features from Integrated CRM to a comprehensive Warehouse Management System with Multi-Bins and mobile scanning. Additional modules have been added for Offline PoS with touch-screen capabilities, a comprehensive Workshop (Repair Module), complemented by a comprehensive Mobile Sales Workforce application for Android and iOS devices. There is something for everyone with Trade Creditor Reconciliations, POD Document Management, extended General Ledger Journal functionalities and much more.

WHY CHOOSE PREMIUM?

Lowest Cost of Ownership for Superior Functionality

Uses Modern Technology to Future Proof your Business

All Business Data in One Single Secure Database

CHANGE WHAT YOU THINK ABOUT ACCOUNTING SOFTWARE

NEW FEATURES IN PALLADIUM PREMIUM

Inventory, Warehousing & Distribution (I,W & D)

Multi-bin Locations

Manage Inventory within Multiple Bins in your warehouse with Min/ Max levels, User-Access rights & Item Compatibility Rules per Bin.

Extended Bulk Label Printing

Select, filter and print bulk labels throughout the system with the ability to select different label layouts at time of printing.

Item Number and Description Conventions

Create Items using a defined Item Code and Description Lookup table to ensure that users conform to the correct numbering or description conventions.

Soft Bill of Materials

Create Assemblies on the fly at time of Sale, with the ability to configure the components dynamically.

Internal Requisitions for Employees

Process internal requisitions against employees with the ability to activate a biometric receipt authentication function or use a management authorization for approval.

IBT Orders

Allow Branches to process IBT orders on a Central Warehouse or to other Branches, to facilitate the Picking and expediting of the Branch Order.

Workshops

Workshop Management Module

Facilitates the quoting and repairs of internal or client assets, including vehicle servicing, light machine work, fabrications or even repairing a computer.

General Ledger

Preview Financials

Preview the effects of your General Ledger Journal on your Financial Reports before recording.

Journal Line Attachments

Attach documents at line level when creating Journals.

Save Journals

You can now save Journals before updating for later recall with a Verified checkbox per line that acts as a placeholder for verified Journal lines.

Reversing of Journals

You can set a Journal as a Reversing Journal with a defined reversing date and have the ability to process the reversing Journal when required.

Journal Formulas

Enter formulas rather than values to create the debit or credit Journal values, with these being saved as a further audit trail for verification purposes.

Unlimited Financial Budgets

Create an unlimited number of General Ledger and Department Budgets or Forecasts and report across Budget Years.

e Commerce

eCommerce

Set up a Magento, WooCommerce or Shopify online store that syncs with Palladium Accounting, allowing you to run an online store while using your ERP solution to manage Inventory, Customers and pricing, greatly reducing maintenance time, eliminating online store restocking and improving reporting.

General

Dashboards

Our Intuitive Dashboards function allows you to present your data in a simple, easy to understand, graphical view, with metro-blocks, graphs and data list views.

Enhance your Operational Efficiency, saving you hours and improving collections, by automatically sending outstanding Invoices with emailed Customer Statements!

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NEW FEATURES IN PALLADIUM PREMIUM

General

Switching Companies On The Fly

Alleviate the need to log in and out of companies, and switch between companies using a simple drop-down menu for users with the same username and password.

Inter-Company Operability

Inter-Company Orders

Automatically Create Sales Orders in your Supplier or Franchisor's Database directly from your New Purchase Orders, alleviating the need to recapture.

View Related Company Inventory

Have the ability to view related company on-hand inventories from your inventory enquiry screens, such as suppliers or other franchisees, either by synchronizing directly from the related Palladium company database or by synchronizing from files such as excel.

Item Masterfile Synchronisation

Have the ability to Synchronize Inventory Masterfiles and Categories across Multiple companies.

Sales & Procurement

POD Document Management

Attach Delivery Notes to your Sales Invoices or Delivery Advices automatically or as manual attachments. Run reports to identify outstanding POD's so that you can better manage and quantify the risk associated with missing documents.

Multi-Level PO Approvals

Create multiple levels for Purchase Order Approvals with the approval function being extended to the Mobile App.

Direct Bank Statement Downloads

The Bank Manager function has been enhanced to cater for direct feed integrations with the bank to allow users to seamlessly import bank statements, with Intelligent account reference mapping.

Trade Creditor Reconciliations

Ensure that all Creditors Accounts are reconciled and ensure that all liabilities are recorded to avoid unnecessary surprises.

Business Tools

Sage Evolution and Pastel Partner Data Conversion

Convert your Sage Evolution or Sage Pastel Partner to Palladium in no time using our comprehensive data conversion tool. We convert all Masterfiles, Take-On Balances, General Ledger Transactions and even Sales and Purchase History, to get you started in hours not days.

Point of Sale

Offline & Touchscreen Point of Sale

Process transactions regardless of internet or network connectivity with dynamic online / offline mode. A custom touchscreen menu option allows you to create customized menus for your users with the ability to assign item images.

Multi-Currency Invoicing and Tender

Invoice different Customers in different Currencies and Pricelists with the ability to Tender across Various Currencies in one single Sale Transaction.

Laybys

Manage Layby's with the ability to create Layby documents and receipts with full layby customer statement capabilities.

Zambia Tax Fiscalization

Palladium has been certified by the Zambian Revenue Authority for compliance with their Electronic Signature Device (ESD) Integration.

ZAMBIA REVENUE AUTHORITY | *My Tax Your Tax Our Destiny*

Integration to Payment Platforms and Wallets

We have extended our integrations of Credit Card Tender functionality to Fortified (Kenya) who offer card integrations to all major providers (including M-Pesa) as well as to the Mr Green Loyalty Point Voucher redemption.

NEW FEATURES IN PALLADIUM PREMIUM

Palladium Alerts

In this world where information is overwhelming, we need to consume our information intelligently and by exception. Our alerts tool is designed to send selected information dynamically so you no longer need to run static reports to look for problems that may or may not exist in the business. You will receive this information in real-time, via email or sms, allowing you to make corrective decisions proactively.

What I do

I am the unsung hero of the business. I don't get leave, don't take off sick, never come in late or get stuck in traffic and do the work of 3. I am the heart and soul of the business and if it wasn't for me this business would fall apart. I work 24/7/365 and challenge you to give me an alert or notification you need that would change your business for good! And it's all thanks to me – the unsung hero!

I am the cheapest and most efficient employee you can ever hire.

Examples of standard Alerts

Accounts Receivable

· Notify customers daily, weekly or monthly of overdue accounts.

· Notify customers or internal staff, of customers who are nearing their credit limit.

· Notify financial manager's when staff members generate a credit note over a specific amount.

· Generate daily, weekly or monthly Excel, PDF or Dashboard reports that are sent to staff via email to show customer sales.

Sales

· Send sales reports automatically to sales reps and sales managers on a daily, weekly or monthly basis to show year on year and actuals against targets.

Inventory

· Create an alert that sends internal staff an Excel or PDF report via email when inventory on hand reaches minimum order levels.

· Send an alert to staff when new inventory is being purchased but there already is sufficient quantity on hand.

· Notify staff when inventory items are sold below a defined minimum GP.

Purchasing

· Create an alert to notify staff when the price on a Purchase Order is greater or lower than the price on the supplier invoice.

· Alert staff of any changes or amendments to any Purchasing Documents such as POs or Supplier Invoices.

• Automate routine tasks using Palladium Alerts.
• Receive advanced notification of all key exceptions within the business.
• Automate standard exception reports to staff, customers, and suppliers.
• Change the behaviour of everyone in your business ecosystem with dynamic proactive reporting.

NEW FEATURES IN PALLADIUM PREMIUM

Palladium Alerts

Benefits of Palladium Alerts

Customisable

Palladium Alerts is customisable to fit with your business. It can monitor most back-end databases and software programs and supports customised triggers and emails.

Fraud Prevention

Prevent Fraud with alerts or notifications on Inventory Adjustments, Document Adjustments, Credit Notes or price adjustments.

Change Behaviour

Change Behavior with Staff, Customers or Suppliers by early warning notifications. Automate and drive process workflows to improve business cycle times.
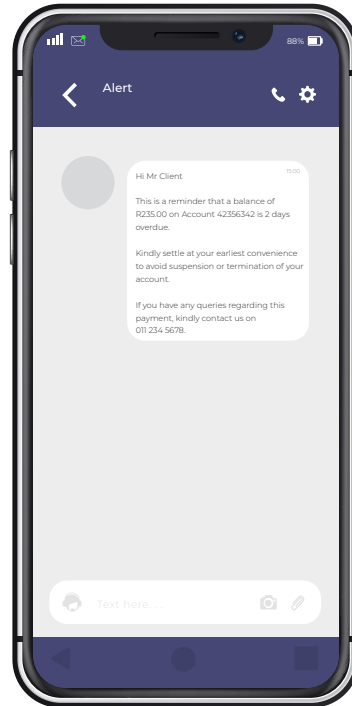
Faster Decision Making

Alerts can help to make executive decisions sooner rather than later by highlighting problems as they happen.

Smarter Insights

Palladium Alerts monitors your business data to send alerts to notify internal users, Customers, Suppliers or any related users.

Manage by Exception and Save Time

Manage your business proactively and not reactively with Advanced, Real-time "Exception" Notifications.

Improves efficiency

Automate mundane, routine tasks or reports, allowing staff to work more productively.

Proactive management

Manage your business proactively and not reactively with better access to critical business data.

Never miss an alert

Get alerts sent via email or SMS.

PALLADIUM MAKES SWITCHING SIMPLE WITH:

- Data conversion and migration tools.
- Affordable and flexible pricing options.
- Free online training.

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NEW FEATURES IN PALLADIUM PREMIUM

Security

Extended Security for Extended POPI / GDPR Compliance

In addition to the Standard MS SQL Server Database Securities we have improved our user Security with Strong Password Policies, Inactive Session Timeouts, Email Notification on Login as well as Change Password function using Tokens.

We have Encrypted relevant Customer, Supplier and Employee Database Fields for added protection.

All e-Mailed Documents are Password Protected for greater Customer and Supplier Confidentiality.

CRM

CRM & Activity Management

This module allows you to manage all activities within your organization from Customer Collections, Sales, Supplier Interactions to general messaging. The CRM component also allows you to manage your customer leads and prospects with the ability to manage and display employee pipelines.

Projects

Extended Projects

The Projects module has been enhanced with the introduction of Project Stages, the ability to allocate resources or items to the various Projects Stages and Extended Budgeting. You can now track your Project and Resource allocation by Stage to control and assess spending, resource use and project efficiency.

Mobile Sales & Warehouse Management App

Our WMS will work with Android scanners and will allow users to manage GRVs, Pick Tickets, Stock Takes as well as Warehouse and Bin Transfers from Android powered mobile scanners like Zebra or Honeywell. The WMS accesses your live Palladium databases ensuring that inventory data is always current and accurate, regardless if you access it from head office or the warehouse.

Stock Count
Conduct stock takes, either by scanning inventory or by manually entering quantities.

Warehouse Transfers
Move inventory across different warehouses.
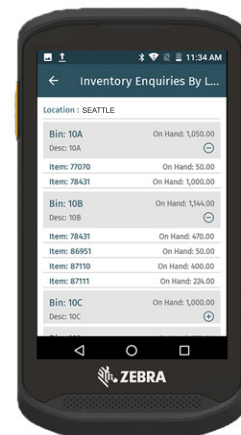
Bin Transfers
Move inventory to different bins to optimise your warehouse space.

GRVs
Convert purchase orders and receive goods into inventory either by scanning or by manually entering the stock.

Multiple Stock Pick
Process pick tickets for multiple items at the same time and mark items as picked.

Stock Pick
Process pick tickets and mark items as picked.

Inventory Enquiries
Check on-hand stock quantities at any time, by item, location or bin.

Put-Aways
Process Put-Aways from GRV's, allowing you to store the Inventory into the appropriate stocking Bins.
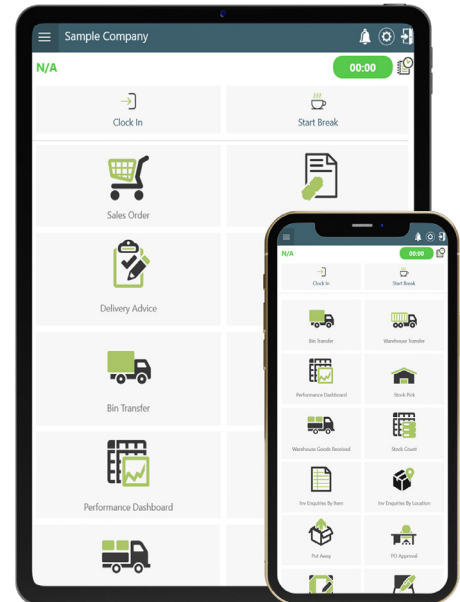
NEW FEATURES IN PALLADIUM PREMIUM

Mobile Sales & Warehouse Management App

Palladium Mobile Sales and Warehousing (WMS) App is an Android, Windows UWP and iOS-based app that provides the ability for sales teams to connect to live data on the road to generate Sales Orders and Sales Quotes or to check inventory availability. It helps enhance enterprise mobility and productivity of sales representatives during customer visits and provide executives with critical insights into the sales process through better planning and tracking.

This is the most comprehensive mobile app available that is built to add value to your business.

It is built in line with our ethos of constantly developing feature-rich solutions and revolves around our three core principles of increasing turnover, improving margins, and enhancing operational efficiency.

GPS Tracking
Activate GPS tracking on your salespersons' devices and monitor their live locations or view their tracking history with the system recording the coordinates on google maps.

Clock in/ Clock out Function
Allows sales teams to clock in and out on their mobile devices.

POD Management
Manage POD's either as a scan verification on the invoice to make sure items aren't leaving the store multiple times on the same document, or take a picture of the delivery document and upload it to Palladium.

Purchase Order and Requisition Approvals
Approve Purchase Orders and Inventory Requisitions on the go.

Sign to Glass
Capture customer signatures on Sales Orders and Sales Quotes with Sign to Glass technology, allowing your sales team to get approved orders and quotes on the road.

Sales Quotes & Orders
Generate sales quotes, freehand quotes and orders on the go while being connected to live data. Email quotes or orders from the device.

Customer Enquiries
Perform Customer Account Enquiries and also have the ability to edit information and to even create Customers, ensuring that the information is always accurate.

Performance Dashboards
View BI dashboards for up-to-date reports.

Inventory Enquiries
Check the availabilities of your Inventory per location on a real-time basis.

Delivery Advices
Process delivery advices from open sales orders or picked items to ensure accuracy at your dispatch area.

POS Price Approval Push Notifications
Receive POS price changes using push notifications, alleviating the need to go to the POS Terminal.

CRM Activities
Process CRM activities and details of Customer visits from your mobile device allowing you to assign tasks to others while you are out the office.