

SUP054 - Understanding Projects in Palladium

Business

Project Setup

Project Information

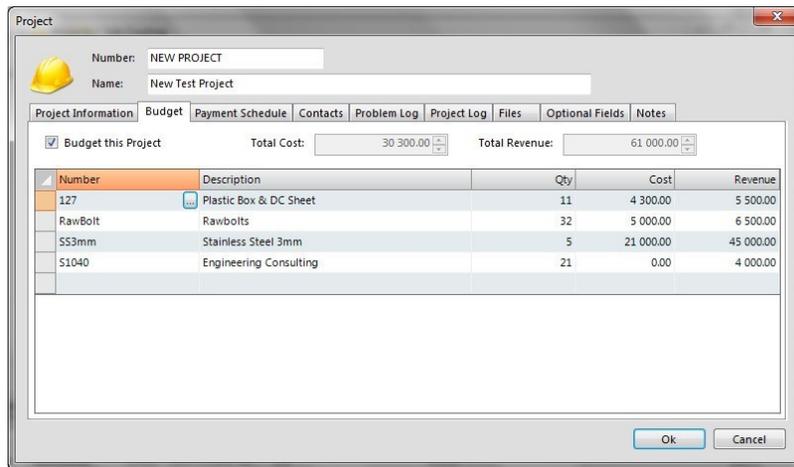
The first thing you have to do is to create a project. This is found in the Palladium Business Section.

Select the feature and create a Project Number and Name, as well as assign the Project to a Customer as well as to a Profit Centre should the Profit Centres be in use.

At this point you now need to enter the various information relating to the project. This information ranges from the Status of the Project with the relevant Milestone dates in order to track the status more effectively. The project type refers type, or terms of payment for the Project allowing you a holistic view of the Project status at a glance.

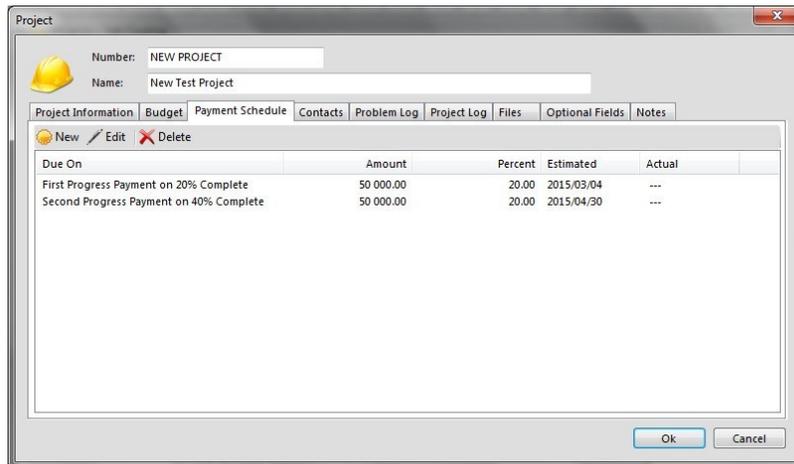
Project Budgets

Palladium allows you to budget costs, revenue as well as item quantities on any given project. The significance of this is that you may well be under cost for a specific item on a project but used 10% over from a quantity point of view. Had we not have been able to budget in this way the effects of the quantity overrun may have been masked by the effects of the effective procurement.



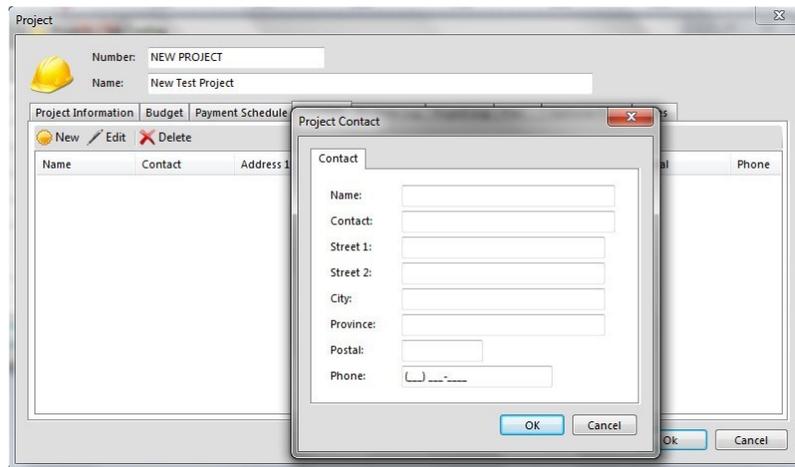
Project Payment Schedule

The payment Schedule Tab allows you to setup and track the agreed progress payments on the job and to manage payments that are contrary to the agreed payment schedule.



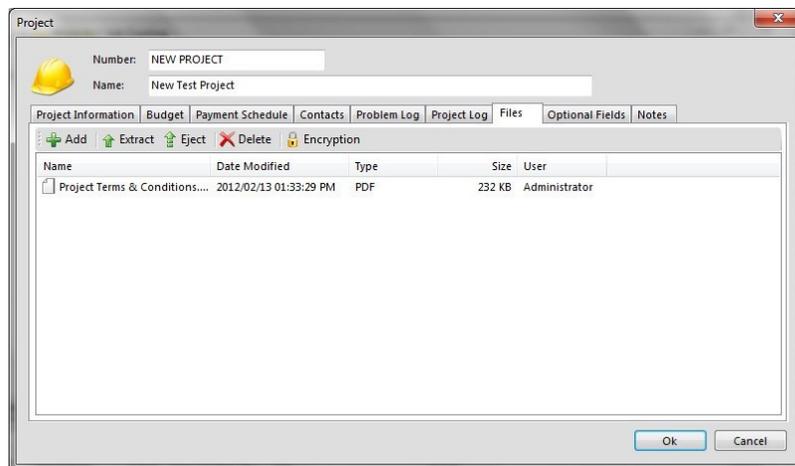
Project Contacts

Palladium caters for the ability to create an unlimited number of contacts relating to the project. These could range from your responsible staff, that of your client or sub-contractors ensuring you have the relevant responsible persons information available when you need it.

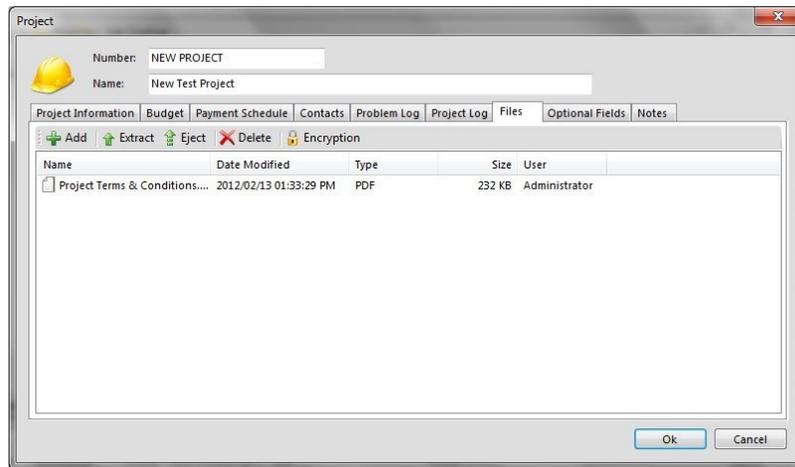


Attach all Relevant Documentation

With Palladium's Project function you can track all information relating to the project with Problem Logs and related resolutions, standard Project Log and notes.



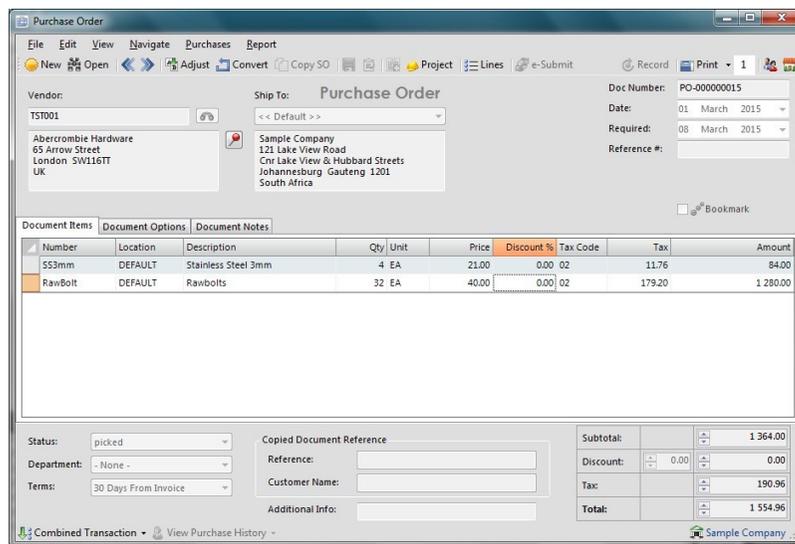
In addition to this, Palladium has the ability to attach all pertinent information and documents to the Project securely with full encryption and security.



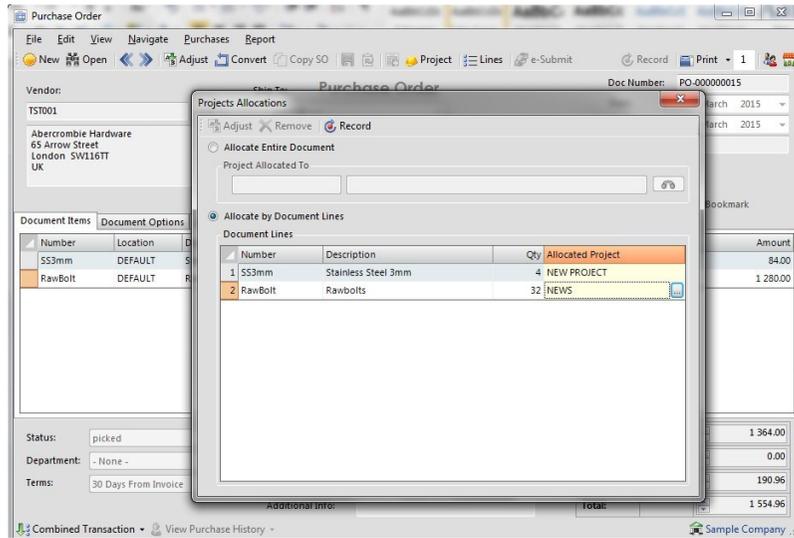
Assign Costs and Revenue to Projects

Costs can be assigned to projects from all Processing Documents from Vendor Quotes/Orders and Invoices to Customer Quotes/Orders and Invoices. This facility gives a project manager the ability to report on all Potential as well as Committed costs and Revenue.

If you refer to the screen below, you will see that we are able to allocate costs to Projects only after the document has been saved (recorded). In addition you are able to track or trace the status of the order using the document status field, situated in the bottom left hand side of the document.



Once we select the Project Icon, we are able to post the costs to one project or to post them, individually to separate projects offering powerful functionality with complete ease of use.



Extensive Reporting

The Palladium Project Reporting function is not only comprehensive, but also uses Terminology used on the industry. We refer to Tenders and Change Orders rather than Sales Quotes offering a Custom application for a very specific industry. Here you can see the extensive list of reports on offer.



Flexible for Multiple Industries

The Project module offers extensive flexibility for it to be used across multiple disciplines and industries for the discerning business that would like to monitor the costs, and/or revenues, relating to a specific project or task. Ideally suited for any business that would like to consolidate or compare the costs and/or revenues across any 2 or more Customer and Vendors.

Use this function to control the profitability of a school fete, the extension or painting of an office in your room of for the construction of a Plant on behalf of one of your customers.

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