Advanced web-based & mobile spend management solutions for mid-market & enterprise organizations worldwide. Stand-alone solution and out-of-the-box seamless integrated extension of:

Blackbaud Financial Edge, Financial Edge NXT

Industries We Serve Include:
- State & Local Government
- Professional Services
- Pharmaceuticals
- Professional Sports
- Gaming & Casinos
- Hospitality
- Telecommunications
- Education
- Transportation
- Life Science
- Technology
- Utilities
- Non-Profit
- Professional Services
- Agriculture

Company Size 5 - 3,000+ Users

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TRANSFORM SPEND MANAGEMENT
Intuitive Web-Based & Mobile Solutions
Intuitive Web-based and Mobile Expense solution that is easy for employees, effective for management, and powerful for accounting!

Capture & view receipts directly on the screen with each expense item

- Advanced Optical Character Recognition (OCR)
- Real-time integration with any bank that supports OFX (Open Financial Exchange)
- Out-of-the-box manual upload options
- Banking-specific custom import maps capabilities
- Auto credit card expense report by employee card assignments

Direct Connect Credit Card & Banking Integration

- Create expense reports from credit card transactions automatically, accurately, anywhere, anytime, with confidence.
- Eliminate data entry and duplicates.
- Full automation, visibility, efficiency
- Robust real-time integration with your balance sheet on the ERP side

Real-Time Cash Advances & On-Account Balance

Experience real-time seamless cash advance & on-account balance adjustments on both the expense & ERP sides, until the entire amount is fully expensed.

Google Maps & Mileage Calculation Capabilities

- Enforce mileage policy with accurate mileage driven with audits via our Google map integration.
- Automatic mileage calculations
- Up to 25 waypoint flexibility
- Standard commute deduction option
- Personal travel subtractions
- Detailed routes driven, even by line item
- Powerful GL Distributions
- Distribute expense, even by line item, into hundreds of GL accounts in seconds.

Powerful Tax Engine

- Assign tax schedule by line level, incorporate enterprise-wide tax amount visibility. Adjust recoverable taxes within the system in no time.
- Foreign recoverable taxes & tax guidelines capabilities
- Advanced tax capabilities

Intuitive Expense Type Engine

Capture detailed financial data with a simple list of Expense Types that can automatically be assigned to GL accounts. Gain control & efficiency through automation mapped to your business while providing superior user experience.

- Robust price, GL account and tax schedule definitions
- Fix price & daily per diem amount enforcement capabilities
- Define attachment requirements based on type of expense
- Cost by country/region maintenance with effective dates options

Robust Questionnaire Capabilities

Enhance communications, streamline entry, and prompt users to provide key information for specific changes, as a requirement or an option.

- Configurable questionnaires, anytime, anywhere
- Unlimited number of questions
- Multiple data types to tailor responses to your business needs

Unlimited business model-specific filter-based rules. Validate a user, group, and role’s transactions against specific defined conditions

Easy Credit Card Assignment

Update & maintain user’s corporate card assignments for automated Credit Card Integrations with convenient options.

- Credit Card Page with its own security option to allow view, maintain, and enter employee credit card assignments in a list view format
- Credit Card Import Map to utilize CSV template & import User ID, Credit Card Type, and Number assignments

Comprehensive Status Monitoring

Solves the common problem of delays encountered in paper-based, Excel, e-mail, and approval processes.

- Intuitive user dashboard shows employees their To-Do’s at a glance
- Users & approvers view the status of a transaction in real-time
- Users & approvers receive e-mail alerts & reminders
- Alternate approvers can be assigned to avoid delays during absences
- Administrators can add custom reports & enable controlled access by user

Mobile Entry & Approvals

Experience easy expense entry and approvals on the mobile app.

- Capture & view receipts directly on the screen with each expense item during entry & approval process. Eliminate mailing or losing receipts.
- Easy use, view, store attachment features

Open Payment Capabilities – (Sunshine Act)

- Comply with Open Payment Act reporting, allocating travel, meals, gifts, payments, etc. by NPI number.
- Expense entry splitting
- Robust NPI search by name, NPI, other fields

Dynamic Rule Engine & Approval Workflow

Implement any corporate spend policy & approval rule imaginable anytime during expense life cycle, even at creation!

- Dynamic rules engine
- Unlimited routing rules
- Unlimited expense entry rules
- Unlimited routing customized to roles and organization structure – based on approval criteria such as amount, department, budget, project, vendor
- Mobile & e-mail approvals
- Position-based approvals, a rapid deployment based on company structure & associated approval limits
- Approval of revisions to a transaction
- Optional auto skip to next [but not final] approver
- Acceptance of variances (price, quantity, expense allowance, travel request)
- Approval criteria can be at transaction (header) level, or expense line level

Filter-Based Controls & Communications Rule Engine

Communicate effectively while enhancing controls by providing custom auto feedback messages to highlight certain conditions when saving, submitting, or approving expenses.

- Alert with custom warnings or error messages to highlight certain conditions for specific user, groups, etc.
- Powerful error rules to eliminate the ability to process expenses under specified conditions- sending a custom message to explain why an error occurred
- Option to require confirmation when submitting expense sheets
- Unlimited business model-specific filter-based rules. Validate a user, group, and role’s transactions against specific defined conditions

Ad Hoc Approvals

Introduce additional approval requirements on the fly while maintaining policies & controls to original defined configuration, moving process forward.

Ad Hoc Approval functionality for added flexibility

- Approvers can add additional approvals to existing workflows on the fly

Travel Request & Pre-approval Features

Control cost before it’s even incurred. Create expense reports from pre-approved travel requests. Enforce corporate policy as well as government regulations, effectively & efficiently.

- Easy to create travel requests
- Unlimited pre-approval & approval capabilities

Multi-Currency Options

Maintain correct reimbursement with full control of exchange gain/loss. Manage & update exchange rates manually or automatically from ERP or online service.

- Foreign & actual local currency options
- Currency rates by expense report, by line item
- Actual & system exchange rate comparison, calculation, reporting
- Automatic flag of variances exceeding approved thresholds

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- Up to 25 waypoint flexibility
- Standard commute deduction option
- Personal travel subtractions
- Detailed routes driven, even by line item

Powerful GL Distributions

- Distribute expense, even by line item, into hundreds of GL accounts in seconds.
- Total control & flexibility reflected in the expense & ERP sides
- Distribution Groups for auto or manual GL distribution
- Want to distribute 50 line items into 500 GL accounts? You can!