



# Partner Guide

It's time to simplify your client's bookkeeping

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[www.pandle.co.uk](http://www.pandle.co.uk)

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Are you looking for a cloud accounting solution to offer your clients which is cost effective and easy to use?

Then say hello to Pandle.

## What is cloud accounting?

The storing of your financial data on remote servers which can be accessed from wherever you are in the world.

The 'cloud' refers to the place the data is stored; usually huge server farms which consist of thousands of computers with the sole purpose of storing data securely, so it can be accessed from anywhere.

## What are the benefits of cloud accounting?

No more backups, downloads, updates, licence keys or compatibility issues associated with traditional software like Sage 50 or Quickbooks Desktop.

Cloud accounting cuts out this hassle, allowing you and your accountant to have simultaneous access to your bookkeeping records, meaning real time changes which you can both see.

# How Pandle can help...

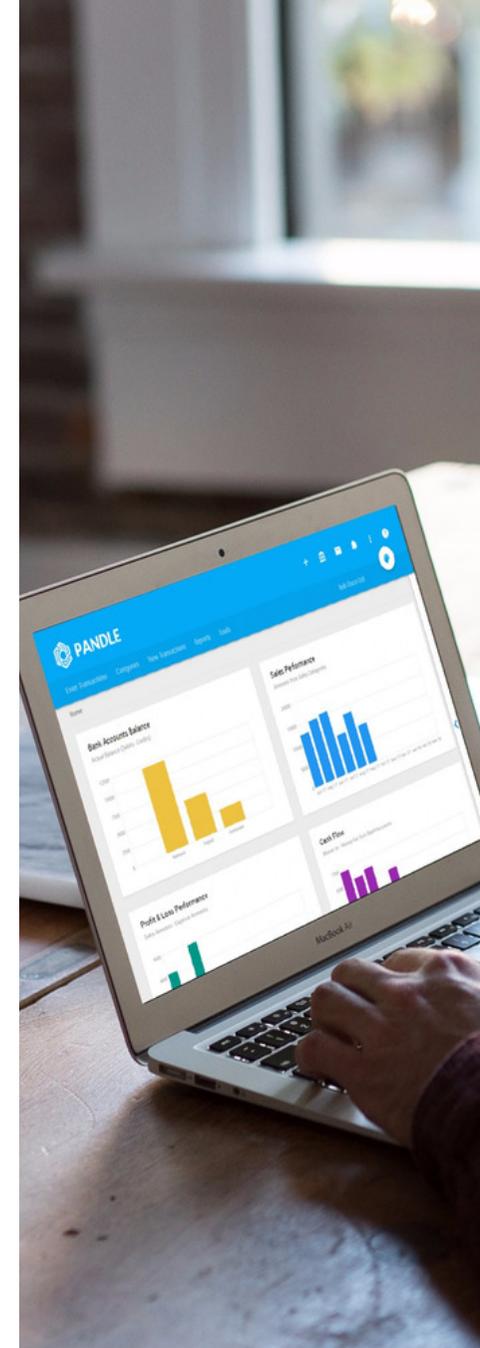
Our mission is to reduce the errors in your clients' bookkeeping through real time warning notifications, machine learning and easy to use software.

## Real time warning notifications

We warn users as they are entering data which has a low probability of being correct, helping them to consider if their entry is accurate or not. Here are just a few examples...

-  Pandle queries small amounts posted to asset accounts, in case they need to be expensed
-  Pandle notifies non VAT registered businesses when they hit the VAT threshold
-  Pandle blocks users from editing transactions for a submitted VAT return
-  Pandle warns users if a transaction brings their cash balance into credit (negative cash)
-  Pandle notifies users if their financial year in Pandle does not match Companies House
-  Pandle alerts users if they import transactions into an account with overlapping dates

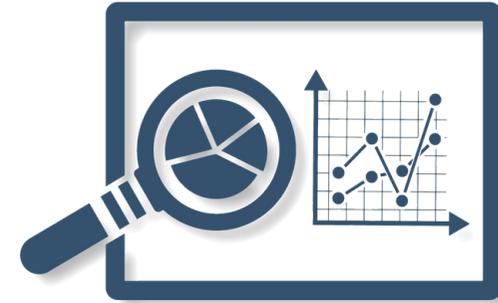
Shortly you will be able to scan your client's data for potential errors, then link straight through to each transaction and correct them if they need to be corrected. The corrections you add in will then go on to further improve our machine learning algorithms.



## Machine learning

We have developed an algorithm in Pandle which suggests categories and tax codes for transactions. This is based on factors like the description, transaction type and previous treatment of similar transactions from other users.

This not only reduces the amount of time users spend confirming their transactions but also means the data is much more likely to be accurate.

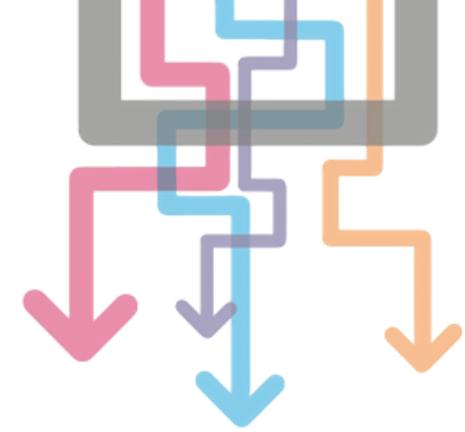


## Easy to use software

We believe that simplicity is the best way to reduce bookkeeping errors.

- ✓ Pandle hides functions which are not relevant to a user's business, leading to a cleaner and simpler user interface
- ✓ Pandle replaces 'accounting jargon' with terms a user will find easier to understand (meaning they ask you fewer questions!)
- ✓ Pandle makes every process as intuitive as possible. For example, instead of entering wage journals, a user enters single entry 'wage adjustments', then Pandle completes the double entries on their behalf

# Pandle solves the problems your practice faces...



## Making Tax Digital

By 2019 all of your VAT registered clients will need to make quarterly submissions through accounting software to replace the tax return.

As HMRC recognised bookkeeping software, Pandle can submit your client's VAT returns directly to HMRC. Two ticks is all it takes.

## Keeping up with your competition

If you are not already working with cloud accounting software then now is the time to adopt it.

Business owners are becoming more tech savvy and are coming to expect collaboration in the cloud. So if your practice only works with Excel or desktop software then you may run the risk of losing clients to competing firms.

## Meeting the demands of your clients

Pandle has all the features your clients expect, so you can provide them with everything they need.

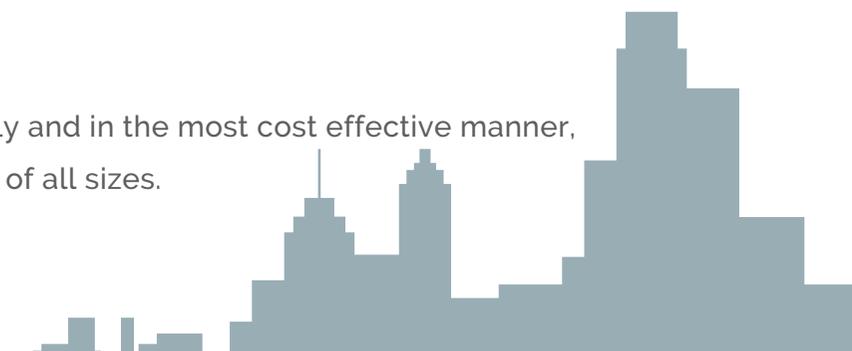
We have worked tirelessly to ensure that Pandle has all the features a small business needs to ensure their bookkeeping is accurate, organised and efficient. These features include:

- ✓ automated bank feeds
- ✓ premium invoice templates
- ✓ receipt uploading
- ✓ android and iOS apps
- ✓ stripe/paypal integrations
- ✓ project handling

## However, one size does not fit all...

We know that Pandle may not be suitable for all of your clients. For your larger more complex clients Xero or Sage would likely be the better choice.

But for your smaller clients that want to complete their bookkeeping quickly, simply and in the most cost effective manner, Pandle is ideal. Many of our Partners run two software solutions to cater for clients of all sizes.



# Partnering with Pandle

There are two ways you can partner with us:

- Partner account
- Brandle

## Partner account

Setting up this special account through Pandle will allow you to work simultaneously with your client, giving you a closer working relationship.

With a Pandle Partner account you will have full access to all of your client's accounts, any time, any place.

You will be able to switch seamlessly between clients, set up accounts on their behalf or invite them to join Pandle and grant you access.

<b>Set up time</b>	<b>Set up fee</b>	<b>Monthly fee</b>
5 minutes	Free	£2.50 + VAT per business

If you choose to pay for your clients' access to Pandle it will cost you £2.50 + VAT per business/month. However, if you'd rather your clients pay for Pandle themselves they will be charged £5 + VAT a month (our standard price for all Pandle Pro users).

## Partnering with Pandle

If you're interested in becoming a Pandle Partner it's really simple to get started.

- 1 Head to [my.pandle.co.uk/become\\_a\\_partner](https://my.pandle.co.uk/become_a_partner)
- 2 Create your Partner account
- 3 Start adding and inviting your clients, right away!

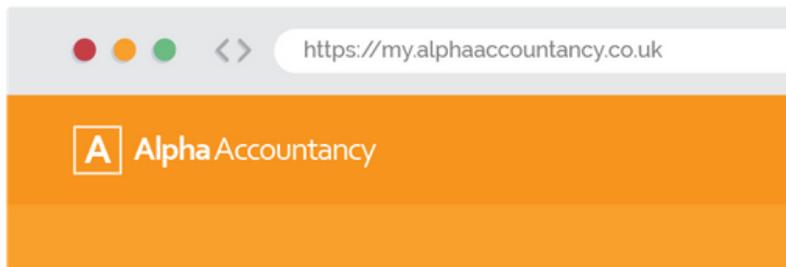
If you have any questions about opening a Pandle Partner account please don't hesitate to email [support@pandle.co.uk](mailto:support@pandle.co.uk) or phone us on 0203 393 7434.

# Brandle

In addition to all of the benefits of our Partner account, Brandle provides your practice with its very own cloud accounting software without the development cost.

We provide your practice with [your own version](#) of the software, hosted on [your domain](#), under [your own company brand](#).

<b>Set up time</b>	<b>Set up fee</b>	<b>Monthly fee</b>
2-3 weeks	£1,500 + VAT	£2.50 + VAT per business*



Pandle is the only cloud accounting provider that offers this service.

If you would also like to offer our Pandle Mobile app to your clients there is an additional set up fee of £500 + VAT.

\*minimum of 20 businesses

## Setting up Brandle

If you're interested in Brandle we would love to give you a live demonstration of how it will work for you.

- 1 Head to [pandle.co.uk/brandle-demo-registration](https://pandle.co.uk/brandle-demo-registration)
- 2 Register for your live Brandle demonstration
- 3 Tell us how we can customise the software for your needs

The live demo will enable you to see how your version software could differ from Pandle. Once you've completed the live demo you can use the test environment for as long as you wish, with absolutely no obligation to sign up.

# The benefits of Brandle

Pandle is the only true white label provider on the market, so there are plenty of unique benefits.

## Branding

We can modify the logos, imagery and colour scheme throughout the application to suit your business.

Absolutely no reference to Pandle will ever be seen by your clients. This means that as far as your clients are concerned it's your firm's software.

This not only enhances your service whilst adding credibility and value to your business but will also make you stand out among your competition.



## Customisation

You can customise the messaging throughout the entire application, from menus and labels, to all help content. For example, if you think your customers are more used to the term 'Nominal Ledger' than 'Categories', then we can change it for you.



## Billing

We can implement your own tailored billing plans via our chosen payment gateway; Stripe. This gives you full autonomy over pricing to clients, which features you want to belong to each billing plan, and the way in which your clients receive support.

## Development

General improvements and updates are free of charge. Your own version will still benefit from the same care and attention we give to Pandle, which means when we release new features you will get them too!

If you have a bespoke requirement, we can develop it for you. You won't find this with any other provider on the market! If your requests are of general benefit to Pandle, we'll develop them for free. If not, then we'll provide a quote for the work.

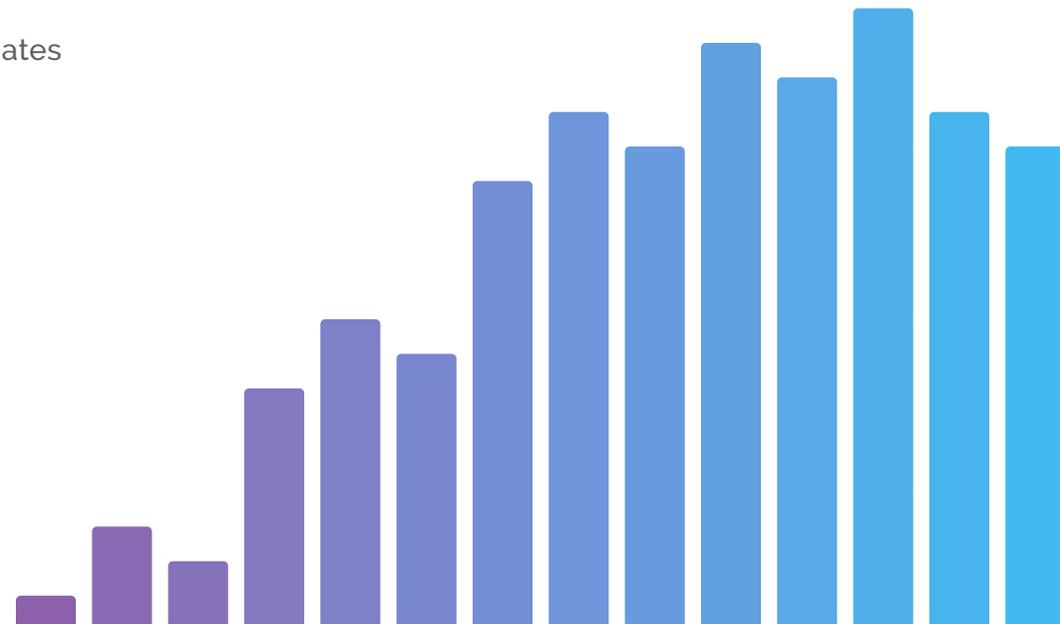
# Upcoming developments for Pandle Partners

We're developing a range of different reports which will provide greater insight into your clients' accounts.

Such as...

- ✓ login frequency
- ✓ inter Pandle invoicing
- ✓ data entry errors
- ✓ client demographics
- ✓ accounts deadlines
- ✓ return due dates

Bespoke reporting can also be requested by Pandle Partners.



# Support from Pandle

If you have any further questions about using Pandle please don't hesitate to contact us.



0203 393 7434

[sales@pandle.co.uk](mailto:sales@pandle.co.uk)

[www.pandle.co.uk](http://www.pandle.co.uk)

We have made every effort to ensure Pandle is as easy as possible to use, but every now and then you may need a little extra help!

This is why we have also created a dedicated help centre where you can access how to guides, live chat support, FAQs and tutorial videos.

You will never be short of ways to find the answer you're looking for at [support.pandle.co.uk](http://support.pandle.co.uk).

