Sage Evolution

102 Western Service Road Gallo Manor Ext 6 Johannesburg 2191 South Africa JHB +27 11 304 3530 CT +27 21 522 7400 DBN +27 31 537 7100 www.sageevolution.com



Sage Pastel Internationa

Tel: +27 11 304 3400 E-mail: info@sagepastel.com www.sagepastel.com

age Pastel Middle East

Tel: +971 4 7058900 E-mail: meinfo@sagepastel.com www.me.sagepastel.com

Sage Pastel West Africa

Tel: +234 14609900 E-mail: info.WA@sagepastel.com www.sagepastel.com

Sage Pastel East Africa

Tel: +254 20 216 0000 E-mail: info.EA@sage.com www.sagepastel.com

Sage Evolution ERP





by Sage Pastel

Version 7

Sage Pastel's continuous investment in research and development ensures that you are kept up-to-date with the latest and most cutting-edge business management software.

The Version 7 release of Sage Evolution incorporates your suggestions and considers your feedback in the new enhancements and modules, giving you greater flexibility, efficiency and control in your business.

General



Iconographic

Sage Evolution has taken the opportunity to give the software a new look and feel by changing the icons to create a more user friendly interface.

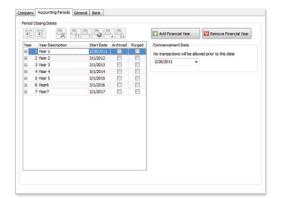
The icons were selected to represent the different modules more effectively and assist you to easily navigate your way around the software.



Utilities

Human errors sometimes occur. The Utilities section allows you to make cosmetic changes to transactional data, in the event where you might have mistakenly used the incorrect date, reference, projects, description or delivery method amongst other selected data.

This takes the difficulty out of doing reversals and keeps your data clean. All changes are written to a log file for audit purposes.



Unlimited Financial Accounting Periods

We know and understand how important historical data is for a company; therefore we now allow you to create unlimited financial accounting periods. Previously we only stored data for 5 years but now you will be able to view historical data well into the past.

You will benefit from this by analysing historical data to make more informed decisions and accurate forecasting.

Freedom Service



KPI Dashboards

Executive Dashboard engages with the Sage Evolution data making it a powerful performance management tool within your business. Fully customisable, also allowing you to create your own Dashboards, focussing on Key Performance Indicators, creating Snapshots of important business elements.



Central Search

Make use of the central search functionality to easily access information within the Sage Evolution software across all modules.

Importing of documents

Automate your industry specific invoices to be imported into Sage Evolution seamlessly and without breaking any of the business principles and rules around your accounting. The document import uses templates for different files formats giving you the flexibility yet ease of use on document imports.

Login Security		
Enable Login Security		
WARNING : Once Login : settings.	Security is enabled	d you will not be able to revert back to the original
Password Settings		
Minimum Password Lengt	h 3 🔅	Password Archive Limit 12
Password Complexity		
Enable Password Comp	lexity	
Passwords to contain	a minimum of char	acters from the following groups:
Numbers	0	0,1,2,3
Letters	0	a,b,c,d
Symbols	0	1,#,(,),",+,-/,<,=,>,?,@,[],^,(],},%,\$
Uppercase	0	A,B,C,D
Lowercase	0	a,b,c,d
Agent Lock Out		
Enable Lock Out		
Lock Out Attempts	0	Lock Out Duration
-mail Versions Reposito	y Access Contro	Security Settings Default System Tree Upda

Add New Au	itoText	×
Branch: All	Branches	
AutoText	PMT	V Public
Text	Payment Than	< You
Owner	Admin (Adminis	strator) (-) 🔻
		OK Cancel

Password Complexity and Agent Lockout

As an added software control measurement, we have enhanced our login security by adding Password Complexity and Agent Lockout settings.

The Password Complexity enables you to enforce specific password combinations which can be aligned to your business's IT protocols.

The Agent Lockout feature allows you to control users entering their passwords incorrectly by specifying lockout attempts and durations.

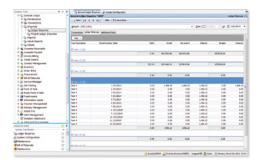
Auto Text

Become more efficient and save time when capturing customer and supplier data by adding auto text selections for transactions throughout Sage Evolution. These are used as shortcuts, commonly known as text expansion, to ensure quick and easy selection.

General Ledger

Automatic Allocations in Cashbook Batches

This time saving feature allows you to automate balance forward transaction allocations when processing cashbook batches in Sage Evolution.



View Ledger Balances per Financial Year

Previously you could not view ledger balances per financial year, but now due to the unlimited financial periods, we have dedicated a Ledger Balances tab on the General Ledger Enquiry screen, allowing you to view specific account balances per financial year.

Interfunction Interfun

Visual Reports

This amazing new feature is a Pivot table within Sage Evolution, which allows you the freedom to mix and match information to display exactly you would you want to see it.

You can even drill down to the source document of the transaction as well as save this Pivot in an Excel, HTML, TXT or XML format.

Different types of charts are available for visual analysis.

IFRS Alignment

We have aligned Sage Evolution to IFRS reporting requirements, general ledger accounts now have the IFRS reporting categories and financial statements formatted to display accordingly.

Accounts Receivable and Accounts Payable

Automatic Payment and Remittances

We have added enhanced settings when saving your automatic payment and remittances.

Close	View 1950	Cancel						
Suppler								
From			- Q	oups	< Al >			*
To			- 40	0.05	< A1 >			*
			Fo	reign Currenc	< AI >			*
Transaction Opt				ates		Audit To	al Numbers	
Transaction Cod					10014	- Acol		
	CM >						·	
Projects			Ψ.	To 2/1	8/2014	* From		
		nactive Projects	0	On Hold		To		
Foreign Current	cy. < Al >		-	On H	old transactions (only		
Select Al	Unselect All						Enlarge	Grid
		oup by that column					Enlarge	Grid
Drag a column h	wader here to pr	oup by that column Transaction Code	Reference	Description	20	Credit	Enlarge On Hold	ľ
Drag a column h Transaction Date	wader here to pr		Reference INV0082346	Descriptio		Credit R39,369.47		Grid
Drag a column h Transaction Date 8/6/2012	eader here to p Account	Transaction Code			Order		On Hold	ľ
Drag a column h Transaction Date 8/6/2012 8/8/2012	eader here to pr Account GEE001	Transaction Code SINV	IN/0082346	Purchase	Order	R39,369.67	On Hold	ľ
Drag a column h Transaction Date 8/8/2012 8/8/2012 8/9/2012	Account GEE001 SER001	Transaction Code SBW SBW	DW0082346 DW002363	Purchase Purchase Purchase	Order	R39,369.67 R21,434.19	On Hold	ľ
Drag a column h Transaction Defe 8/6/2012 8/6/2012 8/9/2012 8/9/2012	Account GEE001 SER001 COM001	Transaction Code SINV SINV SINV	DW0082346 DW002363 DW0012321	Purchase Purchase Purchase	Order Order Order on DBN - 3HB	R39,369.67 R21,434.19 R1,344.20	On Hold	ľ
Drag a column h N6/2012 8/8/2012 8/9/2012 8/9/2012 8/9/2012 8/13/2012	Account GEB001 SER001 COM001 CAR001	Transaction Code SINV SINV SINV SINV	DW0082346 DW002163 D400012321 DW002322	Purchase Purchase Purchase Freight fi Purchase	Order Order Order on DBN - 3HB	R39,369.67 R21,434.29 R1,344.20 R627.00	On Held	ľ
Crack a column In Transaction Date 8/6/2012 8/8/2012 8/9/2012 8/9/2012 8/15/2012 8/15/2012 8/20/2012	Account GEE001 CCM001 CAR001 HAR001 HAR001 GEE001	Transaction Code SINV SINV SINV SINV SINV SINV SINV SINV	DW0082346 DW002363 DW0012321 DW002322 54235124	Purchase Purchase Preight fi Purchase Handing	Order Order Order on DBN - 3HB Order	R39,369.67 R21,434.19 R1,344.20 R627.00 R23,217.18	On Held	ľ
Crack a column In Transaction Date 8/6/2012 8/8/2012 8/9/2012 8/9/2012 8/15/2012 8/15/2012 8/20/2012	Account GEE001 SER001 COM001 CAR001 HAR001 HAR001	Transaction Code SITW SITW SITW SITW SITW SITW SITW	2NV0082346 2NV002363 2N00012321 2NV002322 54235124 2NV78234	Purchase Purchase Purchase Freight fi Purchase Handling Goods Re W3FI SET	Order Order order on DBN - 3HB Order & Dispetch sceived Voucher UP & CONFIG	R39,369.67 R21,434.19 R1,344.20 R627.00 R23,217.18 R2,221.00		ľ
Transaction Detr 8/6/2012 8/8/2012 8/9/2012 8/13/2012 8/13/2012 8/13/2012 8/13/2012 8/20/2012 8/20/2012 8/22/2012	Account GEE001 SER001 CCM001 CAR001 HAR001 MAN001 GEE001 WDR001 GEE001	Transaction Code SRW SRW SRW SRW SRW SRW SRW SRW SRW SRW	BW0082346 BW002263 BW002322 BW002322 54235124 BW78234 III67234QW 3080001 25625	Purchase Purchase Preight fi Purchase Handing Goods Re WIPI SET Purchase	Order Order Order on DBN - 3HB Order & Dispetch socived Voucher UP & CONFIG Order	R39,369.67 R21,434.29 R1,344.20 R627.00 R23,217.18 R2,221.00 R37,143.99 R1,500.00 R356.30		ľ
Transaction Data 8/6/2012 8/6/2012 8/9/2012 8/15/2012 8/15/2012 8/13/2012 8/13/2012 8/13/2012 8/20/2012 8/23/2012	Account GEE001 SER001 COM001 CAR001 HAR001 HAR001 GEE001 WIR001	Transaction Code SPW SINV SINV SINV SINV SINV SINV SINV SINV	PN0082346 PN0082363 PN00012321 PN002322 54235124 PN78234 III67234QW 3080001	Purchase Purchase Preight fi Purchase Handing Goods Re WIPI SET Purchase t Take on I	Order Order Order on DBN - 3HB Order & Dispetch socived Voucher UP & CONFIG Order	R39,369.67 R21,434.19 R1,344.20 R627.00 R23,217.18 R2,221.00 R37,143.99 R1,500.00		ľ

Supplier Transactions – On Hold

Should you have any unresolved disputes with a particular supplier's transaction, this feature allows you to put supplier transactions on hold, withholding the payment until such time it is placed off hold.

This will filter through to your automatic payment and remittances whereby the scheduled payment will exclude the supplier transactions placed on hold.

Mail Merge

Send personalised customer documentation in html format using the Mail Merge feature from within Sage Evolution. Create personalised letters of demand to customers who have overdue terms or past their credit limit via email and keep track of this correspondence with Sage Evolution's built in CRM functionality.

Inventory

Add New Document P	rofile
Document Profile Age	ents
Code	Active
Description	
Document Type	Invoice
Document Sub Type	Document -
-Invoice Document N	umbering
Use Defaults	
Automatic Numberin	
Next Automatic Num	
Prefix	Sample 001
Unique Number	
Transaction Code	Select a Transaction Code 🔻
Print Layout	Select a Stationery Layout Prompt
Print Foreign Layout	Select a Stationery Layout
Email Layout	Select a Stationery Layout Prompt
Email Foreign Layout	Select a Stationery Layout
Exclusive Processing	Default Tax Per Document Default
	OK Cancel

Document Profiles

To give you peace of mind and control about what type of documents reach your customers or suppliers by post or email, Document Profiles allow you to enforce specific invoice numbering and creates consistency by allocating specific printing and emailing document layouts per agent. Document layouts can also be selected from any inventory related document before printing it, which allows other agents to also make use of the layouts, when and if necessary.

General	Contact	Address	Options	R	etail/Point of Sale	Defaults Batch Default		Defaults
Purchase	Order	Groups	Groups Access Permissions System Tree				Document Profiles Fi	
-	ment Profiles							
Agent Docu Doc Type		Doc Sub Type	e Code	Δ	Description		Active Pro	ofile
-			e Code INV001		Description Invoice 1		Active Pro	ofile



Quick Price Enquiries

This feature allows for proactive processing, by performing quick inventory price enquires at any time. You are able to create quotes and invoices with a click of a button as well as toggle between pricelists.

nvoice	rder Entry Point of Sale Retail Point o	fSale	
Code	Description	Default	Force
0001	Delivery	V	
redit Note			
Code	Description	Default	Force
0001	Delivery	v	
		••	
xcess Invoi	ice		
	Description	Default	Force
Code	Excess	V	(m)
Code EXS001	Excess	v	

Additional Charges

Keep control of additional charges incurred like courier or surcharge levies by quickly adding them to an invoice. Sage Evolution allows you to update the correct general ledger expense accounts and can apply the charges based on a fixed value or percentage value.

Three Stage Inventory

This might seem like unfamiliar territory, however, Sage Evolution has made it simple and easy. By enabling this, it allows you to perform invoicing in stages, by issuing stock first, in cases where customers only wanting a consolidated invoice at month end or invoicing a customer first, before delivery of goods have taken place. The best about this feature is, is that it makes use of a Delivery Accrual account giving you piece of mind that your Cost of Sales account will balance at the end of the day.

New Invoice (INV0014*)	
File Edit View Line Foreign Currency	Print
🛛 🔀 Close 🕞 New 🎾 Open 💾 Save	🐴 Quote 🛯 Issue Stock 🔌 Invoice Customer 🕹 Issue & Invoice
Account	Document

m	Information	Dimensions	Pricing	Defaults	Incident History	Images	
)ime	nsions						
tod	king Unit	m²		T	Enter Measurem	ents mm	Ŧ
ach	Description						
Pur	chase						
Ler	ngth		1,830.00	mm	Area	2.23 m ²	
Wic	ith		1,220.00	mm			
Hei	ght		0.00	mm			
Sel				,			
	ngth		1,830.00	mm	Unit	m ²	Ŧ
Wie	ith		1,220.00	mm	Area	2.23 m ²	_
Hei	ght		0.00	mm			
	override Dim set Dimensior	ensions on Sel	ing				
Re							
Re							
Re							
Re							
Re							
Re							

Dimensions

The availability of Units of Measure Items have been a dynamic feature in Sage Evolution since its inception; however, after extensive research and customer interaction it has become clear that we have to take it to the next level, which then translated into Dimension Items as seen in Version 7.

Dimension Items gives you the ability to stock items using specific dimensions such as m^2 and m^3 .

You can specify buying and selling dimensions depending on the type of item and is perfect for environments where inconsistent measurements are sold based on client requirements.

Customer invoice document Gross Profit

View the Gross Profit % when you are processing a customer invoice on the fly.

Warehouse lookup on inventory enquiries

When performing specific inventory item enquiries, you are now able to invoke a warehouse lookup field enabling you to establish which warehouse this item belongs to.

Line Line Foreign Classe Liness Involce	cz. Post		-		-	- 2
Account Customer CADH (CaDH Cu Addresse	598)		۹.	Bricks Nu Order Nue Dehreny N External O Project	her Ak	Sect a freed .
Delvery Address Floo	d Address			Delvery H Represents Settlement Document	terns	Soloci a Delivery Hathod • Delet & Remewellikiter • Securi a Betlement Rem Cale • 9
Description Decess Sources Excess Callulations C Ansaurt @ Par Percentage(%)		rsice Inclusive mages	R. 736			Pessiger
Evena Talan	R 64.63	Additional Charges		# 1.00 # 1.00	Poine T Exclusion Tax Alt	- Tutal 8 64.63
Exclusive Tatlel Tax. Innount		and the second				
	1754	Indusive Tabal	_	R.140	12.24	OK Canol

Excess Invoicing

Mostly applicable to insurance claims, this feature allows for secondary customer processing.

Depending on your setup, the system simultaneously generates two invoices which are linked to a common transaction.

Ideally used in businesses where the customer is invoiced for the excess amount and the insurance company for the full value of the item.

Bill of Materials

User defined fields on BOM headers and lines

We previously limited bill of material user defined fields to document header sections, but now you are able to create specific bill of material user defined fields for transaction lines.

Import of Bill of Materials using DDS

To avoid recreating simple to complex bill of material recipes, we have alleviated your possible frustrations by allowing you to import them using our dynamic Data Distribution Services utility.

Branch Accounting

Global costs for online branch environments

Global costs are available in an online branch accounting environment allow you to manage you costs much more easily across different branches.

Bin location per branch

Managing stock and picking items per branch has just been made much more easier by having a bin location per branch.

Group by branches when printing consolidated reports

When generating consolidated reports, it was hard to analyse the branch contributions. You are now able to group consolidated report information by branch.

Retail Point of Sale



Touch Screen Interface

Retail Point of Sale module can now be used in conjunction with Touch Screens, which benefits you in more ways than one. It speeds up processing times, culminating into higher sales and ultimately ensuring customer satisfaction.

EFTPOS Integration

Different card payment devices are compatible with Sage Evolution. A simple setup process is required for a smooth integration into Sage Evolution and the respective banks, transforming your Point of Sale Stations into dynamic payment portals.

Biometric and RFID SignOn

Different card payment devices are compatible with Sage Evolution. A simple setup process is required for a smooth integration into Sage Evolution and the respective banks, transforming your Point of Sale Stations into dynamic payment portals.

Sage Inventory Advisor

age Inventory Advisor		Last import 08 Nov 20
Dashboard Locations Forecasting	Orders Suppliers Stock enquiry	Settings
Days 8	Dashboard (Los Angeles)	
Stock holding	Fill rate 95.95%	684.1k
Potential stock outs	Excess stock	471.6k
Product code Value	Product code Value	Product code Value
80134670467 🔤 42.04 💻	801246F0215N07 0 20.44 0	80150101828 C 24.2% C
001292282 23.6k 2000 0056490N 21.3k 2000	B01248/PONO? * C 16.5k *	UUSP9001190 0 19.3k 0
Total lost sales 159.3k	Total potential lost sales 93.8k	Total surplus orders 114.0k

Features

This easy-to-use web based interface assists you to manage your inventory replenishment processes.

Some key features include:

- Dashboard
- Visibility to critical Inventory KPI's and financials
- Stock holding, stock outs, potential stock outs
- · Excess stock and surplus orders.
- Inventory Forecasting
- Inventory Monitoring
 - Provides early warning of stock-outs
 - Potential stock-outs, or Surplus orders
- Ordering Schedule
- Supplier Performance
- Interactive Reports