

**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](http://www.sageevolution.com)

**Sage Pastel International**

Tel: +27 11 304 3400

E-mail: [info@sagepastel.com](mailto:info@sagepastel.com)

[www.sagepastel.com](http://www.sagepastel.com)

**Sage Pastel Middle East**

Tel: +971 4 7058900

E-mail: [meinfo@sagepastel.com](mailto:meinfo@sagepastel.com)

[www.me.sagepastel.com](http://www.me.sagepastel.com)

**Sage Pastel West Africa**

Tel: +234 14609900

E-mail: [info.WA@sagepastel.com](mailto:info.WA@sagepastel.com)

[www.sagepastel.com](http://www.sagepastel.com)

**Sage Pastel East Africa**

Tel: +254 20 216 0000

E-mail: [info.EA@sage.com](mailto:info.EA@sage.com)

[www.sagepastel.com](http://www.sagepastel.com)



# Sage Evolution ERP

sage



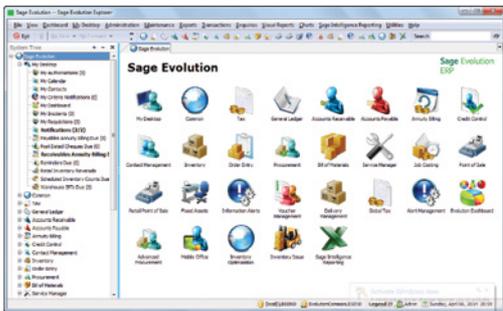
by Sage Pastel

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.

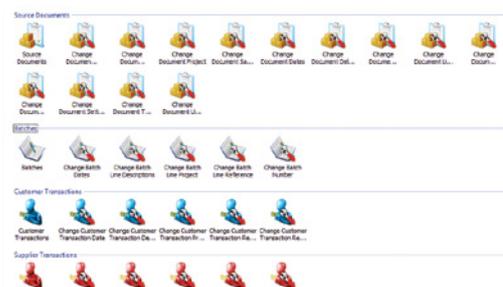
## General



### 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.

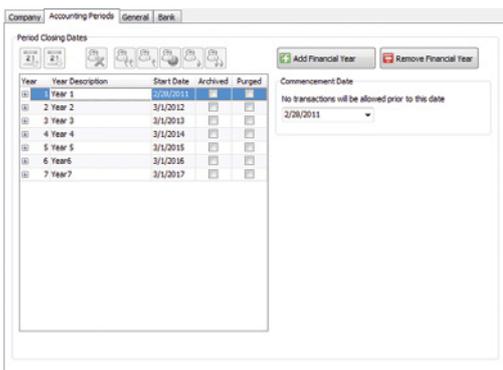
The icons were selected to represent the different modules more effectively and assist you to easily navigate your way around the software.



### 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.

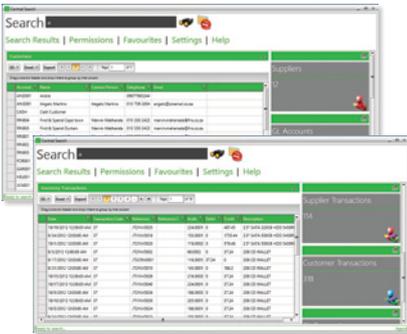
You will benefit from this by analysing historical data to make more informed decisions and accurate forecasting.

# 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.

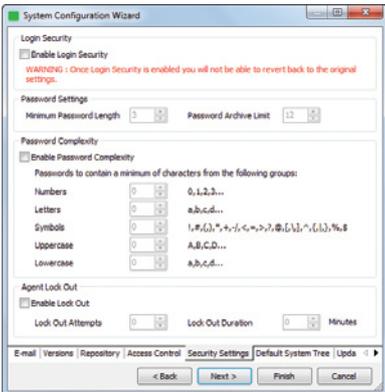


## Central Search

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.

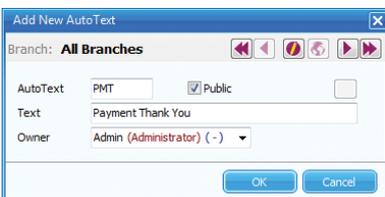


## Password Complexity and Agent Lockout

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.



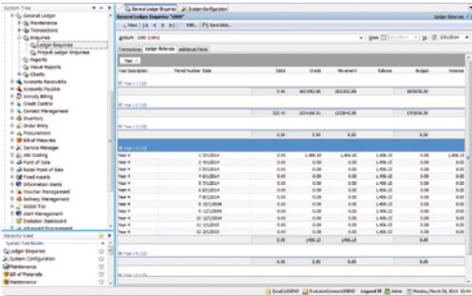
## Auto Text

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

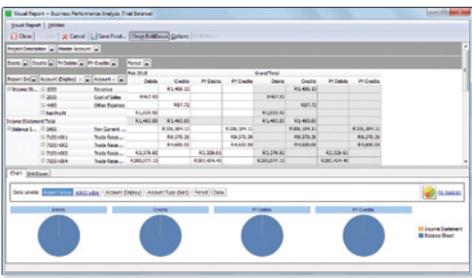
## Automatic Allocations in Cashbook Batches

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.



### 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 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.

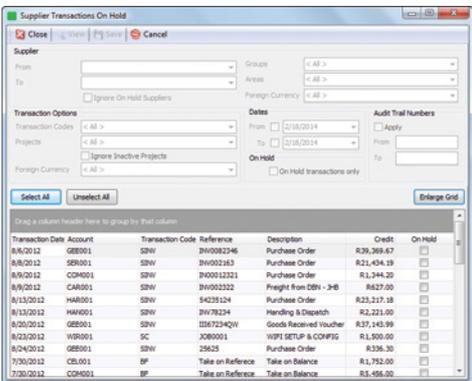
## IFRS Alignment

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.



### 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

## 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.

Doc Type	Doc Sub Type	Code	Description	Active Profile
Invoice	Document	INV001	Invoice 1	<input checked="" type="checkbox"/>
Invoice	Document	INV002	Invoice 2	<input type="checkbox"/>

## 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.

Code	Description	Default	Force
0001	Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Code	Description	Default	Force
0001	Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>

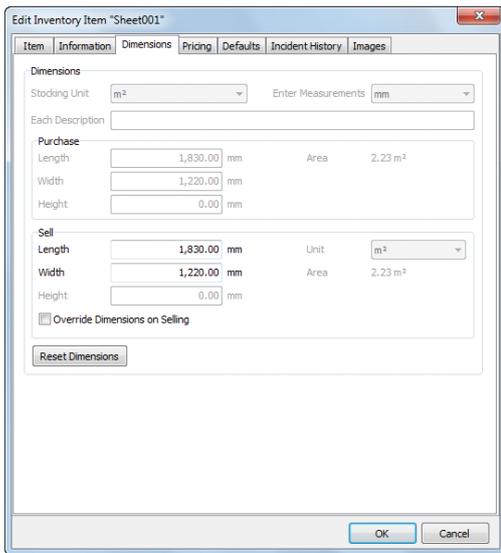
Code	Description	Default	Force
EXS001	Excess	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.



### 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<sup>2</sup> and m<sup>3</sup>.

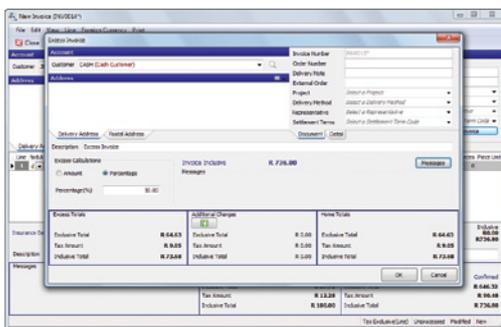
You can specify buying and selling dimensions depending on the type of item and is perfect for environments where inconsistent measurements are sold based on client requirements.

### 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.



### 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

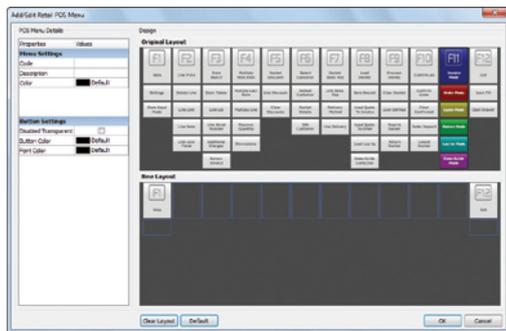
Managing stock and picking items per branch has just been made much more easier by having a bin location per branch.

## 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



## 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