sage Evolution

Your guide to an integrated and holistic software solution for a dynamic business environment

Notes:

Need a good reason to choose Sage Evolution?

Here's ten:

one*   accountants recommend sage pastel accounting

two*   fully integrated business management application

three* lowest total cost of ownership

four*   easy to use

five*   specialised modules for industry specific requirements

six*   simplified reporting

seven* improve and enhance customer and supplier relations

eight* access to skills

nine*   increased productivity

ten*   backed by an extensive national service and support infrastructure

Sage Evolution delivers an entire business management solution

Features

General Ledger
Unit of Measure
Dimension Items
Cash Book
Goods Received Voucher
Accounts Receivable
Alert Management
Accounts Payable
Advanced Security
Inventory Control
Microsoft® Office Integration
Import Cost Allocations
Graphs
Central Search and KPI Dashboards
Invoicing
System Audit Manager
Sales & Purchase Order Entry
Tax Module
Visual Reports
Project Tracking
Report Writer & Stationery
Customisation
SagePay (SA Users)

*The above features and modules
are referred to as the core Sage
Evolution system.*

Add-on Modules

Annuity Billing
Lot Tracking
Bank Statement Manager
Manufacturing
Bill of Materials
Sage Evolution Mobile
Branch Accounting
Multi-Currency
Business Gateway
Multi-Warehousing
Sage Evolution Intelligence Reporting
Municipal Billing
Debtors Manager
Payroll*
Customer Account Consolidations
Point of Sale
Customer Credit Risk Management
Pricing Matrix
Delivery Management
Procurement **
E-Business & E-Billing
Advanced Procurement**
Fixed Assets*
Sage Evolution CRM Standard
Retail Point of Sale
Sage Evolution CRM Premium*
Job Costing
Serial Number Tracking
Voucher Management
Service Manager
Global Tax
Mobile Sales
mSCOA

* *These modules can be purchased as
   stand-alone applications.*

** *Requires Sage Evolution CRM
   Premium module.*

> With our rapid growth and
> large volume of transactions
> conducted via a high traffic
> website, Evolution has been
> a life-saver.
>
> Marina Goodson, Financial Manager,
> bidorbuy.co.za

Features of the Core Sage Evolution Application

System Manager

The System Manager is the control centre for the entire Sage Evolution application. It is the system's user interface. Featuring a System Tree for navigation, it also controls the system environment and set up, online help and multi-level password security. Sage Evolution delivers enhanced efficiency, productivity and security to any business.

System Manager offers the following:

- A consistent user interface no matter which module you are using. Fixed Assets or Accounting, they all share the same common interface and all appear as options on a single System Tree.
- Standard navigation tools such as menus, the System Tree, toolbars and favourites.
- Powerful tools for maintaining, sorting, searching and grouping your lists of data.
- The ability to customise the interface to suit each user's requirements and to create user defined fields on master and transaction file records.

Features within System Manager:

- Store Data Indefinitely
- Transaction Rollback
- Supports Multiple Companies
- Transaction Drill Downs
- Document Imports and Exports
- Document Profiles

Advanced Security

Your data is your data! We understand the need for confidentiality within your business. You need to control access to this information. Sage Evolution features multi-level, menu-driven password access control. Sage Evolution also enables you to control who sees what with password protected menus.

System Audit Manager

Eliminate internal fraud and unauthorised transacting within your business with the System Audit Manager. This tool assists you to track and manage database activities for all or selected database tables allowing you to report on detail changes for both transaction and masterfile tables.

Integrated with Microsoft® Office

Seamless integration with MS Office means that you can e-mail any report. You can use several standard formats such as HTML or PDF. You can also export data into Word or Excel, where you can perform your own complex data manipulations. This feature complements Sage's extensive range of management reports.

The Sage Evolution CRM module integrates e-mail management with Microsoft® Outlook.

Password Complexity and Agent Lockout

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.

Graphs and Visual Reports

You have the ability to view graphs. For example, you can compare General Ledger account movements over a period of five financial years. You can compare sales and purchases in the Orders module, and you can view incident analysis in the CRM module.

Report Writer

The Report Writer module allows you to customise standard reports per user as well as stationery layouts per user. It integrates into every module in the Sage Evolution range.

Receivables and Payables

Sage Evolution gives you instant access to customer and supplier balances, overdue totals and sales/purchases history. Drill down features and reports are available when you need a more detailed analysis of customer/supplier transactions.

You can create multiple delivery addresses for each customer and supplier. Set processing defaults for delivery requirements/addresses, selling prices and discounts which you can override for each transaction.

Multiple Debtor & Creditor Control Accounts

If you wish to analyse debtors and/or creditors in the General Ledger, you can use more than one General Ledger control account for Receivables or Payables. This is over and above your normal reporting within the Receivables and Payables ledgers.

Project Tracking

This module allows you to allocate income or expense transactions to particular projects. You can then filter reports on a project basis and create an income statement per project.

General Ledger

The General Ledger is the heart of the financial function of your company. All processing you do eventually reflects in the General Ledger. The system has no tedious month or year-ends. The system is date driven, allowing you to post transactions to any period at any time. You can block periods that are complete, thereby preventing operators from accessing them in error and stores five years of information.

Segmented General Ledger

If you have a complex and multidimensional General Ledger, you can create General Ledger accounts using multiple segments up to ten levels.

Cheque Printing and EFTs

You can print cheques from any bank account. The cheque layout is fully customisable to accommodate requirements from different banks. You utilise user access levels to control who can print cheques.

Unlimited Financial Periods

You can now create unlimited financial accounting periods, allowing you to analyse historical data and make more informed decisions and to forecast more accurately.

Sales & Purchase Order Entry

You can maintain and control outstanding orders, processed orders and back orders. This module integrates fully into Sage Evolution's Inventory, Receivables and Payables modules.

This module allows for the following:

- Print and process purchase and sales orders, and then fill these orders in part or in whole, keeping track of outstanding orders.
- Create financial lines, which allows you to post non-stock amounts directly to General Ledger accounts
- Allocate sales and purchases to projects.
  - You can do this on a document basis or even line by line on each document
- Allocate sales representatives to each document or even to individual document lines
- Reserve stock quantities for customers when they place an order
- Print picking slips and delivery notes
- Create purchase orders automatically using the reorder fields on the inventory records
- Create quotes and convert into sales orders once confirmed
- Powerful reports help you manage outstanding and overdue orders
- Merge multiple orders into a single invoice

Inventory Control

Sage Evolution's powerful Inventory module gives you unlimited control over your stock. The system provides both summarised management reports as well as detailed operational reports, all customisable per user.

Unit of Measure

This feature gives you the ability to specify a buying and selling unit for each inventory item and advises which unit will be used to account for the inventory on hand.

Dimension Items

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 it's perfect for environments where inconsistent measurements are sold based on client requirements.

> An end-to-end business solution was essential for us to ensure better than usual CRM that also supported the business basics like job costing, invoicing and reporting.
>
> Anju Sahni, Logistics Director and Co-owner, Securex

Goods Received Voucher

This feature allows you to receive and immediately update your stock levels. This is based on a delivery note from your supplier and you do not have to update the supplier account until you receive the actual supplier invoice.

Import Cost Allocations

When you import goods, there are frequently additional costs that do not originate from the supplier. For example, you may be liable for shipping costs and/or import duties. This feature allows you to process these additional costs at the same time as the Goods Received Voucher. The system uses the additional costs to calculate the item costs correctly. Without this, you have to process these costs at another time and then adjust your item costs manually.

Three Stage Invoicing

This feature 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 thing about this feature is that it makes use of a Delivery Accrual account giving you peace of mind that your Cost of Sales account will balance at the end of the day.

You can process Customer Goods Return Vouchers and Credit Notes based on the stage in which the stock was issued.

Extend Sage Evolution's power by combining the Inventory module with other related add-on modules:

- With Multi-Warehousing, you can create multiple warehouses or stores and move items between these stores.
- Serial Number Tracking serialises individual inventory items and keeps track of them by their history. The system   follows their purchase, internal movement in the company, sale and possible return for repair or refund.
- Lot Tracking lets you track items by lot, where batches of items all have the same lot number. You can specify expiry dates and a status per lot number.
- Bill of Materials allows you to manufacture or assemble items from components. The system takes the component materials out of stock into work in progress, and then allows you to create finished items ready for resale.

> ### Evolution has worked miracles for our month end.
>
> Kai Esterhuizen, Financial Manager, Dew Crisp

- Pricing Matrix lets you have selling prices per inventory item or inventory group and per customer/supplier or   customer/supplier group. These can be price or percentage discounts on the customer's/supplier's standard price.

All these add-on modules work together. For example, you can manufacture serialised items into warehouses and track lot numbers.

Alert Management

To cater for the move by many businesses to increase staff productivity and become more efficient, the Alert Management module has been designed to streamline key roles within the business. The module allows you to receive notifications based on a set of predefined criteria to allow for better planning and control in your business.

Alert Management allows you to send and receive notifications via SMS or e-mail based on predefined criteria. This allows you to keep your employees, customers and suppliers up-to-date with business related information, account balances and inventory status updates.

Also available as a mobile application.

Inventory Optimisation

This new feature will form part of the core modules of Sage Evolution. It allows you to manage your inventory levels by specifying minimum and maximum stock levels, minimum re-order levels and quantities. An automatic purchase order will be generated by the system, taking into account the preferred suppliers linked to the inventory item, lead times and reorder levels determined by your business' standard operating procedures.

Main features of Sage Evolution Inventory Optimisation:

- Automate the process using templates
- Perform real-time sales analysis
- Manage minimum, maximum and re-order inventory levels
- Create custom formulas
- Cost optimisation
- Makes use of the Just In Time (JIT) approach

Inventory Issue

The Inventory Issue feature manages and tracks your internal stock distribution between departments, business units, staff members, jobs & projects.

Main features of the Sage Evolution Inventory Issue Module:

- It generates inventory requisitions for approval within a multi-level workflow environment
- Allows you to issue inventory for job cards, general ledger accounts and projects
- Different templates for recurring entries can be created using this feature
- Allows you to process Inventory Issue transactions in batches

Tax Processing (for SA users)

A new Tax node has been added to the Sage Evolution software to align the SARS requirements pertaining to VAT submissions in South Africa. This node will host all tax related information pertaining to your business. This node will include the generating of:

- Tax Types
- Tax Groups
- A Tax Report based on the SA VAT 201 layout. This is referred to as the Tax Box Report. This report will allow you to consolidate transactions by reference.

> We see the benefits of Sage Evolution across our Malawian operation. With accurate information, we have better stock and debtor management.
>
> Peter Ellis, Managing Director, Macsteel Africa

Sage Pay

Do you want a safe and secure payment solution for your business? Sage Pay has over 10 years experience in providing payment solutions to small and medium sized businesses throughout South Africa. We are excited to announce that Sage Pay integrates with Sage Evolution, allowing your business to receive customer payments, as well as make supplier payments in a few easy steps.

1. Before you can configure Sage Pay within Sage Evolution you are required to have a Sage Pay account.

   To sign up today, visit www.sagepay.co.za.
2. Configure your Sage Pay account number and service keys.
3. Prepare your customers and suppliers for Sage Pay payments and receipts.
4. Link your bank account to the Sage Pay EFTS Layout.
5. Start receiving and making payments.

You can also validate bank details and request credit risk reports via Sage Pay.

Customer Zone

The Customer Zone is aimed at uploading certain data to the cloud which will allow customers self-service features such as viewing their statements and drilling down to the invoices. Customers will be able to reprint invoices and make secure payments via the Sage Pay** Δ secure payment gateway.

*   These modules can be purchased as stand-alone applications.

** Requires Sage Evolution CRM Premium module.

Comparative Features Table

◊ Additional user licences can be purchased, according to the number of users accommodated per product, as outlined below.

		Evolution **Standard**	Evolution **Premium**
Base	Database Manager	MS SQL	MS SQL
	Number of users	10	1 - 300+ ◊
	Number of companies	Unlimited	Unlimited
	Number of Financial Years	Unlimited	Unlimited
	User Defined Fields	YesΔ	Yes
	General Ledger	Yes	Yes
	Segmented GL Accounts	No	Yes
	Cash Books	Unlimited	Unlimited
	Customers	Yes	Yes
	Quotations	Yes	Yes
	Invoices	Yes	Yes
	Suppliers	Yes	Yes
	Purchase Orders	Yes	Yes
	Inventory	YesΔ	Yes
	Segmented Inventory Items	No	Yes
	Import Cost Allocations (landed cost)	No	Yes
	Projects	YesΔ	Yes
	Report Writer	Yes	Yes
	Stationery Customisation	Yes	Yes
	Alert Manager	No	Yes
Add-on Modules*	Multi-Currency	Yes*	Yes*
	Sage Evolution Intelligence Reporting	Yes*	Yes*
	Point of Sale	Yes*	Yes*
	Debtors Manager	Yes*	Yes*
	Bank Manager	Yes*	Yes*
	Multi-Store/Warehousing	YesΔ	Yes*
	Job Costing	No	Yes*
	Bill of Material	Yes*	Yes*
	Manufacturing	No	Yes*
	Mobile Sales	Yes^	Yes^
	Lot Tracking	No	Yes*
	Fixed Assets	Yes*	Yes*°
	Payroll	Yes°	Yes°
	Sage Evolution CRM Standard‡	Yes*	Yes*
	Sage Evolution CRM Premium	No	Yes*°
	Pricing Matrix (Disc. Matrix & Vol. Disc.)	Yes*	Yes*
	Customer Account Consolidations	No	Yes*
	Customer Credit Risk Management	No	Yes*
	Annuity Billing	No	Yes*
	Sage Online Tools	No	Yes*
	Retail Point of Sale	No	Yes*
	Branch Accounting	No	Yes*
	Procurement	No	Yes*
	Advanced Procurement	No	Yes*
	Municipal Billing	No	Yes*
	Voucher Management	Yes*	Yes*
	Delivery Management	No	Yes*
	Serial Number Tracking	Yes*	Yes*
	Global Tax	Yes*	Yes*

*   Purchase as an add-on module
°   Purchase as a stand-alone module
†   Annual License Fee product
Δ   Limited functionality
‡   Available as part of Sage Evolution Core for International versions
^   Includes 5 free devices, thereafter any additional devices must be paid for

Please refer to the system requirements on www.sage.com/za

Isn't it time you evolved to something sleeker and simpler to implement?

Annual Renewal

Sage Evolution Accounting and all modules within the Sage Evolution product range are subject to an annual renewal fee. This business model provides customers with a number of important benefits including updates and upgrades and first line telephonic and e-mail support*. The compulsory annual renewal is payable on the anniversary date of registration of the Sage Evolution application and will automatically provide you with advanced notification.

*   *For international versions first line telephonic and e-mail support is available through your local business partners.*

The accounting system forms the financial heart of your business which becomes a central repository of key information that you rely on. The concept of a compulsory annual renewal fee is similar to insurance. It gives you peace of mind that you always have the backup service, support and expertise you need. This concept appeals to businesses that consider Sage Evolution a crucial element to the efficient and competitive running of their business.

Sage Pastel Peace of Mind

The Sage Pastel range of products – Sage Pastel My Business, Sage Pastel Xpress Start-Up, Sage Pastel Xpress, Sage Pastel Partner, Sage Evolution – ensures that from start-up to medium-size enterprises, through to large organisations, your business software will sustain and support continued growth.

Powerful and flexible, Sage Pastel's feature-rich applications are suitable for a broad range of industries. Sage Pastel is committed to ensuring that you get the very best out of your software. That's why we continuously invest in improving our comprehensive service and support infrastructure.

SAGE EVOLUTION

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