

# Sage Evolution ERP

sage



by Sage Pastel

Version 7

Sage Evolution Version 7 is here. It's time to get serious about greater flexibility, efficiency and control within your business.

Our continuous investment in research and technology ensures that you are always kept up to date with the latest in ERP and business management software. Version 7 encompasses both the feedback received from you as a valued Sage Pastel customer as well as brand new features that will enhance your business processes making for a more efficient and productive working environment.

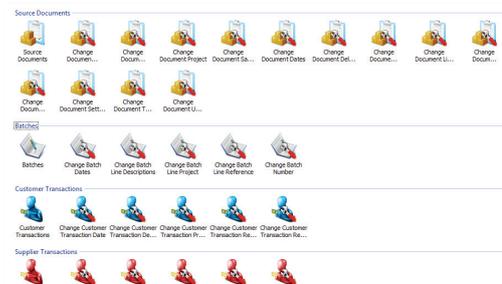
## General



### Iconographic

We've taken the opportunity to give our software a new look and feel by changing the icons to create a more user friendly interface.

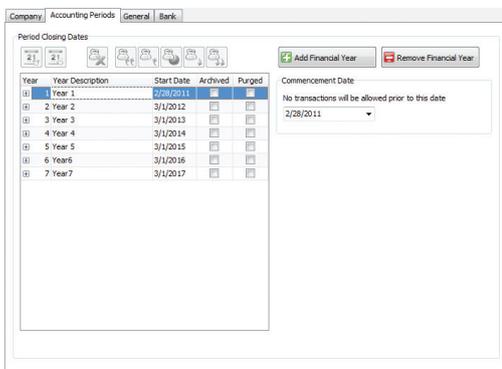
The icons were selected to represent the different modules more effectively and assist you in easily navigating your way around the software.



### 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.

The benefit here is that you can now analyse historical data and make more informed decisions and forecast more accurately.

### Biometric and RFID SignOn

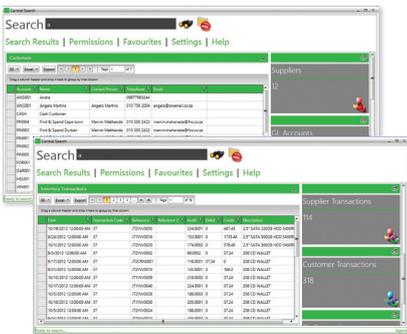
Biometric and RFID Sign-on devices are now compatible with Sage Evolution. A simple setup process is required for a smooth integration, enabling secure access control at your Point of Sale stations.

# Freedom Service



## KPI Dashboards

Our Executive Dashboard engages with your Sage Evolution data making it a powerful performance management tool within your business. It's fully customisable and allows you to create your own dashboards focussing on Key Performance Indicators creating snapshots of important business elements.

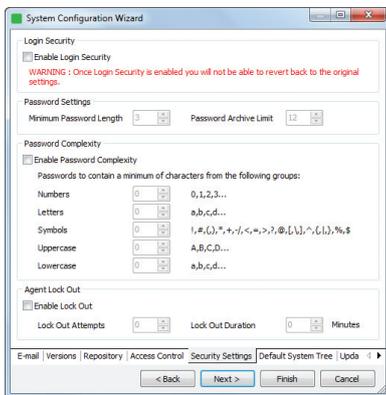


## Central Search

Make use of our central search functionality to easily access information within your Sage Evolution software.

## 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. Our document import uses templates for different file formats giving you the flexibility, yet ease of use, when importing documents.



## 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.

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.



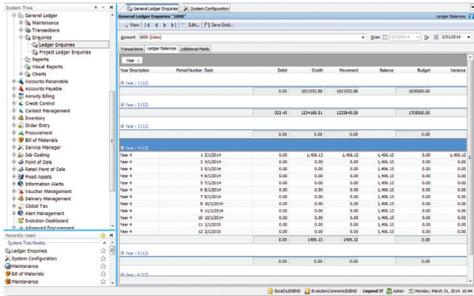
## Auto Text

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

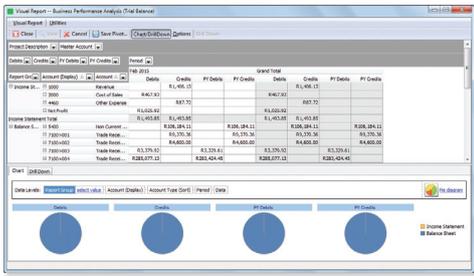
## Automatic Allocations in Cashbook Batches

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 addition of 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 so that it displays exactly what you want to see.

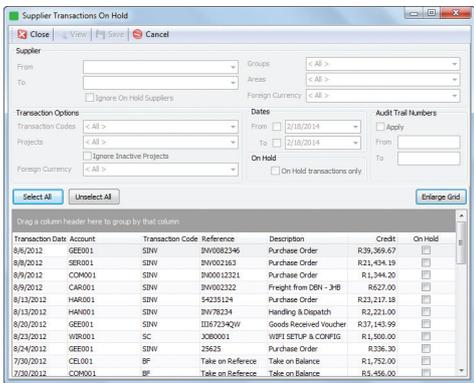
You can even drill down to the source document of the transaction as well as save this Pivot in an Excel, HTML, TXT or XML format.

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



## 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"/>

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

## Quick Price Enquiries

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

## 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.

## 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 has translated into Dimension Items.

Dimension Items gives you the ability to stock items using specific dimensions such as m<sup>2</sup> and m<sup>3</sup>.

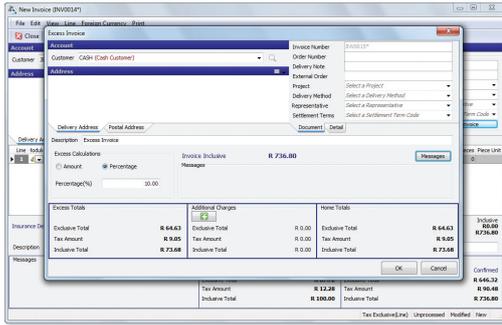
You can specify buying and selling dimensions depending on the type of item and it's perfect for environments where inconsistent measurements are sold based on client requirements.

### 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 an 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 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 allowing you to manage your costs more easily across different branches.

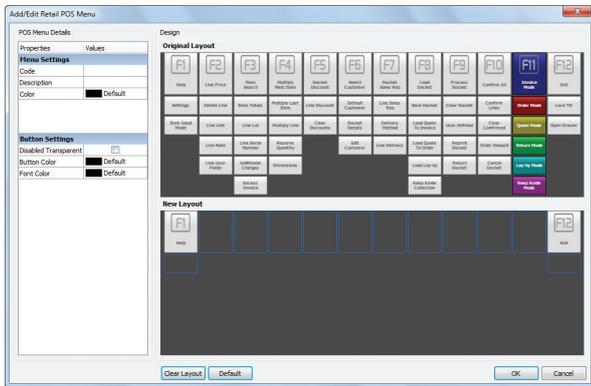
### Bin location per branch

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

### Group by branches when printing consolidated reports

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

# Retail Point of Sale



## Customised Till Menu

This unique feature allows you to customise your function keys to align with your Retail Point of Sale processing requirements. This will speed up agent processing times, resulting in more effective and efficient till turnaround times, increased sales and lastly satisfied customers.

## EFTPOS Integration

Different card payment devices are how 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\*



This easy-to-use web based interface assists you in managing 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

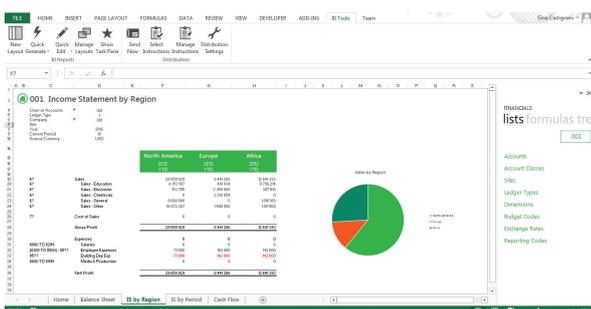
\* Available as an add-on module for purchase

# Sage Evolution Intelligence Reporting (previously known as BIC)

## More control over your financial reports

The Report Designer (previously known as the BIC Excel Genie) boasts a fresh new user interface, and has vast improvements in performance through its powerful In-Memory technology giving you a quick and responsive experience when designing reports in the familiar interface of Microsoft Excel. The Report Designer gives you two methods of creating reports depending on your Excel knowledge, offering you maximum control and flexibility over your report layouts, and it provides you with predefined layouts that you can run without having to map or configure your accounts.

*Intelligence Reporting is compatible with the 32 and 64-bit versions of Microsoft Excel® 2007, 2010, and 2013.*



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