

A man wearing a red hard hat and a yellow safety vest over a light blue shirt stands in a warehouse. He has his arms crossed and is looking towards the camera. The background shows industrial shelving with blue containers.

sage 200 Evolution

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

# Need a good reason to choose Sage 200 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 200 Evolution delivers an entire business management solution

## Features

System Audit Manager  
Advanced Security  
Microsoft® Office Integration  
Graphs and Visual Reports  
Central Search and KPI Dashboards  
Visual Reports  
Report Writer & Stationery Customisation  
Customers  
Suppliers  
Invoicing  
Project Tracking  
General Ledger  
Cash Book  
Sales & Purchase Order Entry  
Inventory Control  
Unit of Measure  
Goods Received Voucher  
Import Cost Allocations  
Inventory Optimisation  
Tax Module  
Sage Pay  
Customer Zone  
Dimension Items  
Inventory Attributes  
Multiple Bin Locations per Warehouse  
Alert Management

## Add-on Modules

Annuity Billing  
Bank Statement Manager  
Bill of Materials  
Branch Accounting  
Business Gateway  
Customer Account Consolidations  
Customer Credit Risk Management  
Debtors Manager  
Delivery Management  
Fixed Assets  
Lot Tracking  
Manufacturing  
Mobile Sales  
Multi-Currency  
Multi-Warehousing  
Payroll  
Point of Sale  
Pricing Matrix  
Procurement  
Retail Point of Sale  
Contact Manager Premium  
Contact Manager Standard  
Sage Intelligence Reporting  
Sage Online Tools  
Serial Number Tracking  
Voucher Management

*The above features and modules are referred to as the core Sage 200 Evolution system.*

**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 200 Evolution Application

## System Manager

The System Manager is the control centre for the entire Sage 200 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 200 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 200 Evolution features multi-level, menu-driven password access control. Sage 200 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.

### 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.

## 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 Contact Manager module integrates e-mail management with Microsoft® Outlook.

## 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 Contact Manager 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 200 Evolution range.

## Customers and Suppliers

Sage 200 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 Customers and Suppliers. This is over and above your normal reporting within the Customers and Suppliers 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 200 Evolution's Inventory, Customers and Suppliers 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 200 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.

### Quick Grid Entries

Work more efficiently within the within grids using the copy and paste feature from Excel in various inventory forms. Make quick changes in Excel and copy them back into Sage 200 Evolution.

### 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. Manage your inventory more efficiently by creating multiple barcodes per item, barcodes per unit of measure and pricing per unit of measure

### 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.

### Inventory Attributes

Define attributes per inventory item for more accurate reporting and maintaining of inventory items. Create an attribute group with attribute types to manage inventory a more granular level.

### 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.

**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

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

### Extend Sage 200 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. Define multiple bin locations per warehouse to simplify physical counts and picking of inventory.
- 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.
- 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.*

## 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 200 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

**I needed a multi-level manufacturing solution to help me better manage my business, and that's when I found Sage.**

Chris Pappas, Managing Director, Mrs Garlic

## Inventory Optimisation

This new feature will form part of the core modules of Sage 200 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 200 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

## Tax Processing

A new Tax node has been added to the Sage 200 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.

## 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 200 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 200 Evolution you are required to have a Sage Pay account.  
To sign up today, visit [www.sagepay.co.za](http://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\*\* secure payment gateway.

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

\*\* *Requires Contact Manager Premium module.*

## 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.*

**The right insights at the right time keeps us competitive. Sage gives us the understanding we need, when we need it.**

Enzo Cocca, the General Manager of Simply Asia.



## Version 9.10 Comparative Features Table

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

		SAGE 100 Evolution	SAGE 200 Evolution
<b>Base</b>	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	Yes <sup>Δ</sup>	Yes
	General Ledger	Yes	Yes
	Segmented GL Accounts	No	Yes
	Cash Books	Unlimited	Unlimited
	Purchase Orders	Yes	Yes
	Quotations	Yes	Yes
	Invoices	Yes	Yes
	Customers	Yes	Yes
	Suppliers	Yes	Yes
	Inventory	Yes <sup>Δ</sup>	Yes
	Segmented Inventory Items	No	Yes
	Import Cost Allocations (landed cost)	No	Yes
	Projects	Yes <sup>Δ</sup>	Yes
	Report Writer	Yes	Yes
	Stationery Customisation	Yes	Yes
	Alert Manager	No	Yes
Sage Pay	Yes	Yes	
<b>Add-on Modules</b>	Annuity Billing	No	Yes*
	Bank Manager	Yes	Yes*
	Bill of Material	Yes*	Yes*
	Branch Accounting	No	Yes*
	Business gateway	No	Yes*
	Customer Account Consolidations	No	Yes*
	Customer Credit Risk Management	No	Yes*
	Debtors Manager	Yes*	Yes*
	Delivery Management	Yes	Yes
	Fixed Assets	Yes* <sup>°</sup>	Yes* <sup>°</sup>
	Lot Tracking	No	Yes*
	Manufacturing	No	Yes*
	Mobile Sales	Yes <sup>^</sup>	Yes <sup>^</sup>
	Multi-Currency	Yes*	Yes*
	Multi-Store/Warehousing	Yes <sup>Δ</sup>	Yes*
	Payroll	Yes <sup>°</sup>	Yes <sup>°</sup>
	Point of Sale	Yes	Yes*
	Pricing Matrix (Disc. Matrix & Vol. Disc.)	Yes*	Yes*
	Procurement	No	Yes*
	Retail Point of Sale	No	Yes*
	Sage Contact Manager Premium	No	Yes* <sup>°</sup>
	Sage Contact Manager Standard	Yes	Yes*
	Sage Intelligence Reporting Standard	Yes*	Yes*
	Sage Intelligence Reporting Advanced	Yes*	Yes*
	Sage Online Tools	Yes	Yes
	Serial Number Tracking	Yes*	Yes*
	Voucher Management	Yes*	Yes*

\* Purchase as an add-on module | ° Purchase as a stand-alone module | Δ Limited functionality

^ Includes 5 free devices, thereafter any additional devices must be paid for

‡ Requires Contact Manager Premium module

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

## Annual Renewal

Sage 200 Evolution Accounting and all modules within the Sage 200 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 200 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 200 Evolution a crucial element to the efficient and competitive running of their business.

## Sage Peace of Mind

The Sage range of products, from start-up to medium-size - businesses, through to large enterprises, ensures that your business software will sustain and support continued growth.

Powerful and flexible, Sage's feature-rich applications are suitable for a broad range of industries. Sage 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.



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