

**sage** 100 Evolution

A man with short dark hair, wearing glasses and a blue and white checkered button-down shirt, is smiling and looking towards the camera. He is holding a black clipboard with a silver clip at the top. The background is a blurred warehouse or industrial setting with shelves and equipment. A dark blue diagonal banner is in the top right corner.

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

# Sage Evolution delivers an entire business management solution

## Features

General Ledger  
 Unit of Measure  
 Cash Book  
 Goods Received Voucher  
 Accounts Receivable  
 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.*

## Other Features

Bank Statement Manager  
 ◦ Bill of Materials \*\*  
 Multi-Currency  
 ◦ Business Gateway  
 Multi-Warehousing  
 Sage Intelligence Reporting  
 Debtors Manager  
 ◦ Point of Sale \*\*  
 ◦ Pricing Matrix

Delivery Management  
 Sage Online Tools  
 Fixed Assets\*  
 Sage Evolution CRM Standard  
 ◦ Serial Number Tracking  
 Voucher Management  
 Global Tax  
 ◦ Mobile Sales

◦ Add-on Modules. \* These modules can be purchased as stand-alone applications

\*\* Not for this release – coming soon

# 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 email 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.

## 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 unlimited years of information.

### 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.

**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

### 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.

### 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.

- 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.
- 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

## 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

\*\* Not for this release – coming soon

- 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.

## Sage Pay (for SA users)

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](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.

**Evolution has worked miracles for our month end.**

Kai Esterhuizen, Financial Manager, Dew Crisp

# 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.



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](http://bidorbuy.co.za)

### 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

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

[www.sage.com/za](http://www.sage.com/za)

### SAGE INTERNATIONAL

Tel: +27 11 304 3400

Email: [info@sagepastel.com](mailto:info@sagepastel.com)

[www.sage.com/africa](http://www.sage.com/africa)

### SAGE MIDDLE EAST

Tel: +971 4 705 8900

Email: [meinfo@sagepastel.com](mailto:meinfo@sagepastel.com)

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

### SAGE SOFTWARE WEST AFRICA

Tel: +234 1460 9900

Email: [sales.wa@sage.com](mailto:sales.wa@sage.com)

[www.sage.com/africa](http://www.sage.com/africa)

### SAGE SOFTWARE EAST AFRICA

Tel: +254 20 403 6000

Email: [info.ea@sage.com](mailto:info.ea@sage.com)

[www.sage.com/africa](http://www.sage.com/africa)

