

# Sage 200 Evolution

## Add-On Module Guide

Sage Evolution is a powerful business management solution that gives you the ability to control your financial situation as well as your relationships with your customers, suppliers and employees.

As a core product, Sage Evolution is feature-rich, but the add-on modules that are available make it a truly revolutionary ERP software solution, ideal for small- to medium-sized businesses.

### Benefits of using Sage Evolution Modules:



Powerful  
functionality



Fully integrated  
with Sage Evolution



Consistent  
user experience



Centralised, secure  
data management



Fully supported

### ACCOUNT CONSOLIDATIONS

Integrating with Customers, this module allows for the separate invoicing of branches, but with the added functionality of printing one customer statement at a consolidated head office level.

This is particularly useful when

- You wish to keep track of a group customer with a head office
- You need to capture sales made to the individual branches, but then present a consolidated statement to your customer's head office.

### ADVANCED PROCUREMENT

Simplify supplier management by automating your procurement processes.

- Create and approve requisitions, request and evaluate quotations and place purchase orders with preferred suppliers
- Analyse your supply chain and manage your supplier's performance on a rotational basis
- Workflows and escalations can be configured to create efficiencies and automate purchasing processes

### ALERT MANAGEMENT

Send and receive notifications via SMS or e-mail, based on predefined criteria. Keep employees, customers & suppliers up to date with business related information, account balances, and inventory status updates (also available as a mobile application).

These notifications can be setup to notify you on time-based intervals, daily, weekly or monthly.

## ANNUITY BILLING

Integrating with both Customers and Inventory and provides for repetitive or recurring invoices on a daily, weekly, monthly or quarterly basis.

You can specify contract periods, design recurring invoice templates or simply set up base amounts to be charged to your customers periodically. It is a flexible module that allows you to customise it according to your business's specific requirements.

## BANK MANAGER

Streamline the processing of bulk bank transactions, while ensuring accuracy.

- Electronically populate the cash book with large volumes of transactions
- Instant processing and coding of accounts, customised to meet your needs
- Streamlined reconciliation process
- Easily update a cash book batch and/or the General Ledger

## BILL OF MATERIALS

Together with the Inventory module, the Bill of Materials module gives you access to two related functions: Bill of Materials and Kit Item Codes. With the Bill of Materials module, you can build, assemble, or manufacture any inventory item using other inventory items as parts or components.

The Kit Item Codes allow for the specification of one code on an invoice, and the system leads multiple invoice lines that can include inventory items and remark lines.

## BRANCH ACCOUNTING

Branch Accounting enables bi-directional synchronisation and consolidation of data.

Information can now be shared, consolidated and saved on both the centralised system at the head office as well as at branch level. For example, all financial, inventory and pricing data is always up-to-date and consistent across branches.

Product prices can be changed at head office level and automatically pushed to all branches. Branch Accounting includes the ability to transact at local level even if the ADSL lines or virtual private network become unavailable.

## CREDIT RISK MANAGEMENT

Your customer will complete a credit risk application form in order for you to assess his/her potential credit-worthiness before granting them any credit. A passing score will see a new account being opened. A failing score will request guarantees or security against granting credit.

The following documentation, amongst others, is included:

- Terms and conditions of sale.
- Credit application forms.
- Both 'soft' and 'final' demand letters.
- Power of attorney forms.

## DEBTORS MANAGEMENT

Debtors Manager creates reports to monitor debt collection progress, staff performance and accurately forecasts cash flow

With ready to run debtors management reports for every outstanding invoice, you can determine why the amount is outstanding; when it will be paid; what has been done and what still needs to be done.

Get paid and improve your cash flow - with Debtors Manager, there are no more excuses!

## DELIVERY MANAGEMENT

Seamlessly integrating into Sage 200 Evolution's Retail Point of Sale, Invoicing and Sales Order modules allowing for items to be flagged for collection or delivery at time of sale. All items flagged as delivery are updated electronically into the Delivery module where the warehouse manager can then control the dispatching of inventory.

- The management of Inventory deliveries.
  - Confirm partial deliveries and cancel deliveries.
  - Generate delivery notes and re-print delivery notes.
  - Generate reports on outstanding, partial and completed deliveries.

## FIXED ASSETS

South African Company Law requires that you keep a register of your business' fixed assets as part of its accounting records. However, business fixed asset management can be tedious and time-consuming.

- Tracking each asset's value
- Depreciating assets correctly
- Maintaining an accurate fixed assets register which records information such as: date of purchase; date of disposal; purchase price; accumulated depreciation and net book value
- Updating the replacement values of your fixed assets for insurance purposes
- 

## INVENTORY ADVISOR

With the right inventory in the right place at the right time, growing your business has never been easier with Sage Inventory Advisor – an affordable cloud solution that helps companies to:

- Minimise stock-outs
- Release cash tied up in excess inventory
- Significantly reduce the time spent on planning, forecasting and ordering.

Sage Inventory Advisor can be implemented in just a few hours and is accessible anytime, anywhere.

## JOB COSTING

You can allocate costs and measure the profitability of short to medium term jobs. Create an unlimited number of job cards, with the ability to archive these for future estimates.

You can allocate jobs to projects on a job card basis or a job line basis.

A job card is more powerful than an invoice, because you can link more types of items besides inventory items in a job.

## LOT TRACKING

Lot Tracking allows you to track several units of a stock item using the same lot or batch number. Expiry dates and user-defined status allow you to further control stock items. Users can determine what can be purchased or sold by Lot Status. You cannot sell stock items that have expired. You can track items simultaneously by Lot Number and by Serial Number.

## MANUFACTURING

This module is an extension of Sage 200 Evolution Bill of Materials. It separates the manufacturing process into time periods where items being manufactured are transferred into Work In Progress and then into Finished Goods.

- Draw stock at the beginning of the manufacturing process, and reverse any unused stock
- Change a Bill of Materials without affecting an ongoing manufacturing process
- Create by-products in addition to your main manufactured item

## MOBILE APPS

Sage 200 Evolution Mobile sales app is the perfect tool to stay ahead of the competition. Now with an innovative suite of mobile applications, this home-grown Business Management Solution (BMS) gives your sales force the ability to extend your business borders by transacting anywhere, anytime. Sage 200 Evolution's Mobile sales applications offers you online/offline modes, allowing the programmes to operate even when users are out of 3G range and still ensure an automated and seamless integration back into Sage 200 Evolution.

## MULTI-CURRENCY

It allows you to track foreign currency, customer and supplier values in both the foreign and home currency. You can view balances and transactions in either currency at any time.

- Process and print customer and supplier sales and purchase documents in foreign currency or home currency.
- Print customer and supplier statements, age analysis and transaction reports (foreign currency or home currency)
- Process foreign currency cashbook transactions.

## MULTI-WAREHOUSING

Streamline your inventory management and warehouse management.

- Ability to link users to one or more stores and prevent users from accessing items in other stores
- The same inventory item code can exist in different stores and will share all item fields except quantities, cost prices, selling prices and reorder information
- Ability to transfer items between stores using a Store Transfer Journal
- Inventory reports will allow you to filter on stores

## MUNICIPAL BILLING

The Sage 200 Evolution Municipal Billing Solution is an affordable solution that delivers essential operational information and can create National Treasury reports. It interfaces and updates all billing data directly into Sage 200 Evolution financials, and updates both the consumer and General Ledger accounts. Expense control with the Procurement and Asset Manager modules allow for Municipalities to run efficiently.

## POINT OF SALE

Integrating with both Customers and the Inventory add-on module, while addressing the practical issues you may encounter within the retail Point-of-Sale environment.

- Security parameters
- Tender types (cash, voucher, credit card and cheque)
- Flexible pricing
- Discounting

It supports peripheral devices such as pole display units, cash drawers, slip printers and a bar code scanner.

## PRICING MATRIX

With this module you can not only create volume-based or time-based price breaks you can specify discounts by customer or group of customers. In addition you can design unlimited discount variations, such as multiple discounts per customer per stock item, and discounts per stock group while having the ability to override discounts on processing invoices.

## PROCUREMENT

This module offers a three tiered process that allows you to precisely manage the numerous purchase orders in your business and keep control of purchases either for internal purposes or specific projects.

- Requisition
- Purchase orders with different authorisation levels
- Convert to Goods received voucher

Throughout the span of a requisition to purchase order completion, all movements or comments are logged against incidents in Sage 200 Evolution Contact Manager Premium.

## RETAIL POINT OF SALE

Retail Point of Sale (POS) brings together a fully integrated front office POS and back office software that meets the needs of SMME retailers for an end-to-end retail management solution. Easy to use, fast and robust, it is fully and seamlessly integrated with Sage 200 Evolution. Control and maintain purchases from branch level and inter-branch transfers (IBT). This ensures that goods sent between your warehouses are monitored and tracked, reducing shrinkage.

## SAGE 200 EVOLUTION CRM

Sage 200 Evolution CRM has taken the concept of traditional Contact Management much further by weaving it into the very fibre of the Sage 200 Evolution accounting system. Sage 200 Evolution CRM Premium contains more advanced features such as:

- Sales Force Automation
- Business Gateway
- Knowledge Base
- Workflow processing
- Incident Graphs
- Escalations
- Contract Invoicing
- Microsoft Outlook Integration.

## SAGE INTELLIGENCE REPORTING

Sage Pastel Intelligence Reporting is an add-on module that dynamically links to your Sage accounting data, taking your business beyond standard reporting functionality. You can generate spreadsheets by simply extracting Sage Accounting data and converting it into an easy-to-read, graphic format. Sage Intelligence Reporting retains report formats and makes them available for future use. You also have instant access to 'live' information and that last minute journal no longer impacts your Excel reporting.

## SERIAL NUMBER TRACKING

Serial Number Tracking allows you to track items from the moment you purchase or manufacture them to the time you sell them. With this stock control software module, inventory management even extends to you being able to track the item for warranty purposes should it be returned to you for repairs.

Use Serial Number Tracking with:

Multi-Warehousing  
Bill of Materials

## SERVICE MANAGER

Schedule and manage the servicing of assets within your business. If your business deals in the rental and servicing of assets, you may find it difficult to keep track of the customer letting, repair and maintenance process involved. Service Manager gives you full control over the scheduling and management of any internal or customer service asset with the automation of service requests, tasks and timetables.

# Additional Sage Offerings

## SAGE ONLINE TOOLS

eCommerce (Online store) & B2B ordering platform.

Sage Online Tools links in directly through Sage Pastel Accounting which means:

- Updated Pricing
- Accurate Stock
- No Data Duplication
- Payments Reconcile
- Wholesale Pricing
- Account Customer Portal

## SAGE ONLINE TOOLS

Website setup. Basic to premier packages available.

- Easy to use site-builder & Templates to do it yourself.
- Mobile friendly
- Hosting at a minimal cost per month
- Once-off setup cost to get you started

## OTHER

- Pre-printed Stationery Suitable for A4 laser, inkjet or continuous feed printers
- Marketing Campaigns Suitable for A4 laser, inkjet or continuous feed printers
- BEE123  
A revolutionary and cutting edge solution to B-BBEE compliance
- Pastel Iron Tree  
Online backup that's simple, secure and fully supported

## Contact Us



CONFERENCE &  
TRAINING CENTRE



42 Valley Road, Robin Hills,  
Randburg, Gauteng



sonja@ibsholdings.co.za



083 271 0579  
011 476 6254



Mon – Fri  
8:00 – 16:45

sage

Evolution  
Business Partner  
*Authorised*