

# Sage Evolution ERP



by Sage Pastel

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

# Need a good reason to choose Sage Evolution?

## Here's 10.

- 1 Accountants recommend Sage Pastel Accounting
- 2 Fully integrated business management application
- 3 Lowest total cost of ownership
- 4 Easy to use
- 5 Specialised modules for industry specific requirements
- 6 Simplified reporting
- 7 Improve and enhance customer and supplier relations
- 8 Access to skills
- 9 Increased productivity
- 10 Backed by an extensive national service and support infrastructure

# Sage Evolution delivers an entire business management solution

## It's the new way to work

Sage Evolution ERP is a solution that brings all aspects of your operating environment together, giving you the ability to control your financial situation as well as your relationships with your customers, suppliers and employees.

Developed within the Sage Evolution Framework™, all components and modules in the Evolution range are fully integrated. They share a common interface, providing a consistent user experience. The Microsoft® SQL Server database ensures data integrity and maintains all your data in one central database. Sage Evolution as a core product is feature-rich, but the add-on modules that are available make it a truly revolutionary ERP software solution.

## The power to run your business

### Features

- General Ledger
- Unit of Measure
- Cash Book
- Goods Received Voucher
- Accounts Receivable
- Alert Management
- Accounts Payable
- Advanced Security
- Inventory Control
- Microsoft® Office Integration
- Import Cost Allocations
- Graphs
- Invoicing
- System Audit Manager
- Sales & Purchase Order Entry
- Tax Module
- Project Tracking
- Report Writer & Stationery Customisation

The above features and modules are referred to as the core Sage Evolution ERP 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

\* 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 ERP 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 ERP 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

## 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 ERP 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.

## Graphs

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.

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## 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 ERP range.

## Receivables and Payables

Sage Evolution ERP 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.



An ERP solution was essential for us to ensure better than usual CRM but also supported the business basics like job costing, invoicing and reporting.

**Anju Sahni**

Logistics Director and Co-owner  
Securex



## 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.

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## Sales & Purchase Order Entry

You can maintain and control outstanding orders, processed orders and back orders. This module integrates fully into Sage Evolution ERP'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 ERP'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.

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Evolution has worked miracles for our month end.

**Kai Esterhuizen**  
Financial Manager  
Dew Crisp

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### **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.
- 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.

## Inventory Optimisation

This new feature will form part of the core modules of Sage Evolution ERP. 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.

## Sage Evolution Add-on Modules

For a detailed description on all add-on modules please visit [www.sageevolution.com](http://www.sageevolution.com) or call +27 11 304 3530 for South African queries or +27 11 304 3400 for International queries.

### 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

\* These modules can be purchased as stand-alone applications. \*\* Requires Sage Evolution CRM Premium module.



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





## 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	5	1 - 1000+ ◊
	Number of companies	Unlimited	Unlimited
	Number of Financial Years	Unlimited	Unlimited
	User Defined Fields	Yes	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	Yes	Yes
	Segmented Inventory Items	No	Yes
	Import Cost Allocations	Yes	Yes
	Projects	Yes <sup>Δ</sup>	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 <sup>Δ</sup>	Yes*
	Point of Sale	Yes*	Yes*
	Debtors Manager	Yes*	Yes*
	Bank Manager	Yes*	Yes*
	Multi-Store/Warehousing	Yes <sup>Δ</sup>	Yes*
	Job Costing	No	Yes*
	Bill of Material	Yes*	Yes*
	Manufacturing	No	Yes*
	Mobile	No	Yes*
	Lot Tracking	No	Yes*
	Fixed Assets	Yes*	Yes* <sup>◊</sup>
	Payroll	Yes <sup>◊</sup>	Yes <sup>◊</sup>
	Sage Evolution CRM Standard <sup>‡</sup>	Yes*	Yes*
	Sage Evolution CRM Premium	No	Yes* <sup>◊</sup>
	Pricing Matrix (Disc. Matrix & Vol. Disc.)	Yes*	Yes*
	Customer Account Consolidations	No	Yes*
	Customer Credit Risk Management	No	Yes*
	Annuity Billing	No	Yes*
	eBusiness & eBilling	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

## System Requirements

Areas	Single User	Workstation	Server
<b>Hardware</b>			
Minimum	Single Core 1Ghz	Single Core 1Ghz	Dual Core 2Ghz
Recommended	Dual Core or more 2Ghz or faster	Dual Core or more 2Ghz or faster	Quad Core or more 2Ghz or faster

**PLEASE NOTE: 32-bit (x86) and 64-bit (x64) processors are supported.**

<b>Operating System</b>			
Minimum	Microsoft® Windows 7 Professional Edition Service Pack 1 or later	Microsoft® Windows 7 Professional Edition Service Pack 1 or later	Windows Server 2008 R2 Standard Edition Server Pack 2 or later
Recommended	Microsoft® Windows 7/8 Professional Edition Service Pack 1 or later	Microsoft® Windows 7/8 Professional Edition Service Pack 1 or later	Windows Server 2012 Standard Edition Service Pack 2 or later

**PLEASE NOTE: Windows XP, Windows 7/8 Starter and Windows 7/8 Home and Windows RT editions are not supported by Sage Evolution.**

<b>RAM</b>			
Minimum	2GB	2GB or more	4GB or more
Recommended	4GB or more	6GB or more	16GB or more

**PLEASE NOTE: Minimum 1GB (32-bit) or 2GB (64-bit)**

<b>Screen Resolution</b>			
Minimum	1024 x 768	1024 x 768	1024 x 768

<b>Database Server - Recommended</b>	
Microsoft® SQL Server 2008 R2 - Service Pack 1 or later.	
Microsoft® SQL Server 2012	

**PLEASE NOTE: Versions of SQL Server 2008, 2005 and lower are no longer supported by Sage Evolution. For more information on SQL Server and product lifecycles, visit the Microsoft website.**

<b>Additional Software Requirements (Server and Workstation)</b>	
Minimum	Microsoft® Excel 2007 or later (for the Business Intelligence Centre module)
Minimum	.Net 4.00 Framework (included on installation DVD)

<b>FTP (File Transfer Protocol) Server</b>	
Recommended	Microsoft® FTP running IIS 6 or later (for Branch Accounting environments)

<b>Evolution Mobile Sales</b>	
Hardware	Samsung Galaxy Note 10.1 N8000 / Samsung Galaxy Tab 10.1 P7500 / Apple iPad 2 or later
Screen Resolution	For Samsung users we accommodate 7", 8" and 10" screen resolutions For iPad users we accommodate 7" and 10" screen resolutions
Operating System	Android Ice-cream Sandwich, iOS 5.1.1 or later
Web Service	Internet Information Services (IIS) 6 or later
Connectivity	3G or WiFi

<b>Additional Important Information</b>	
We strongly recommend you speak to your Sage Evolution Business Partner regarding the system requirements recommended for your specific environment.	

<b>Other System Requirements</b>	
<ul style="list-style-type: none"> <li>DVD Rom 256 Colour VGA or SVGA Graphics</li> <li>The online help requires Internet Explorer version 6 or higher, or a compatible browser</li> <li>To use touch capabilities in Windows 8, you need a tablet or a monitor that supports multi-touch</li> <li>The online help requires Internet Explorer version 6 or higher, or a compatible browser</li> <li>Up-to-date network drivers, service packs and updates for your network and operating systems</li> <li>Windows 7 &amp; 8 personal computers/notebooks need to ensure that the recommended RAM memory requirements and Video Graphics adapters are met</li> <li>The above serves as a guideline. Hardware requirements may differ depending on the operating system and the version of SQL Server. For Microsoft (TM) SQL Server 2012, please note that there are additional software requirements to adhere to. Please refer to the SQL Server specifications document, available on the Microsoft website, for more information</li> </ul>	

# 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 ERP - 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.

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

#### Sage Evolution

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