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# SAGE 200 EVOLUTION

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Product Brochure

# Sage 200 Evolution

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

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# Sage 200 Evolution delivers an entire business management solution. It's the new way to work.

Get back to basics with smart, cost-effective software for big businesses.

Are you finding it difficult to get an integrated and holistic view of your business? If so, it is time to revolutionise the way that you do business with Sage 200 Evolution. By bringing all the aspects of your operating environment together, Sage 200 Evolution is a Business Management Solution that gives you the ability to control your financial situation as well as your relationships with your customers, suppliers and employees.

Sage 200 Evolution provides complete financial management, including invoicing orders, accounts receivable, accounts payable, inventory, order fulfilment with built in CRM functionality to adapt to a variety of industry requirements.

**Built-in Business Intelligence**
that provides real-time insights into key business performance metrics to make informed decisions.

**Make Better Inventory Decisions**
with Sage Inventory Advisor's optimised order management and fulfilment processes to minimize stock outs, place orders more quickly and reduce excess stock ensuring continually efficient operations.

**A Powerful Platform**
that enables businesses to tailor the system to meet their unique requirements and industry-specific needs via best of breed ISV solutions and partner ecosystem that can help businesses scale up

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# Key Benefits

## Manage your business with Sage 200 Evolution

- Fully integrated business management solution
- Improve and enhance customer and supplier relations
- Specialised industry specific modules requirements aligned with best of breed ISV solutions
- User friendly and simplified reporting lowering total cost of ownership
- Secure, scalable and robust

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# Sage 200 Evolution delivers an entire business management solution

**Features**

- General Ledger
- Accounts Receivable
- Accounts Payable
- Inventory Control
- Cash Book
- Unit of Measure
- Goods Received Voucher
- Import Cost Allocations
- Invoicing
- Project Tracking
- Sales & Purchase Order Entry
- Alert Management
- Advanced Security
- Microsoft Office Integration
- Graphs
- Central Search and KPI Dashboards
- System Audit Manager
- Tax Module
- Visual Reports
- Report Writer & Stationery
- Customisation
- Pricing Matrix *s
- Annuity Billing *s
- Bank Statement Manager *s
- Customer Credit Risk Management *s
- Sage 200 Evolution CRM Standard *s

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

**s These modules are available as part of the core on the subscription model.*



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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

**Add-On Modules**

- Annuity Billing *s
- Lot Tracking
- Bank Statement Manager *s
- Manufacturing
- Bill of Materials
- Branch Accounting
- Multi-Currency
- Multi-Warehousing
- Sage 200 Evolution Intelligence Reporting
- Municipal Billing
- Debtors Manager
- Payroll*
- Customer Account Consolidations
- Point of Sale
- Customer Credit Risk Management *s
- Pricing Matrix *s
- Delivery Management
- Procurement **
- Advanced Procurement**
- Fixed Assets*
- Sage 200 Evolution CRM Standard *s
- Retail Point of Sale
- Sage 200 Evolution CRM Premium*
- Job Costing
- Serial Number Tracking
- Voucher Management
- Service Manager
- Global Tax
- mSCOA

** These modules can be purchased as stand-alone applications.*
*** Requires Sage 200 Evolution CRM Premium module.*
**s These modules are available as part of the core on the subscription model.*



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# 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.

**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 200 Evolution CRM module integrates e-mail management with Microsoft Outlook.

**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.

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**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 200 Evolution range.

**Receivables and Payables**
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 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 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 fro 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, 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

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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

**Bank Statement Manager**
The Sage 200 Evolution Bank Manager add-on module eliminates the process of manually capturing transactions from your bank statement. Download an electronic bank statement from any major bank, map the bank transactions to the correct ledger accounts in your books, and the system will automatically assign the transactions for you after each import. Reconciling your bank accounts has never been quicker and easier!

**Direct Bank Feeds**
Businesses can now transfer their bank accounts' financial transaction history automatically and securely to their Sage accounting solutions via FNB Direct Bank Feeds. The connection is made within Sage 200 Evolution with just a few steps to start and is an automatic process that can be repeated with a few clicks.

**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 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  and m  . 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.

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**Inventory Attributes**
Define attributes per inventory item for more accurate reporting and maintaining of inventoryitems
Create an attribute group with attribute types to manage inventory at 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 youreceive the actual supplier invoice.

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**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.

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.

**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 betterplanning and control in your business.

Alert Management allows you to send and receive notifications via 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.

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# Evolution has worked miracles for our month end.

**Kai Esterhuizen,**
Financial Manager
Dew Crisp



**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' standardoperating 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

**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

**Tax Processing (Only for South Africa)**
- A Tax node within Sage 200 Evolution software aligns the SARS requirements pertaining to VAT submissions in South Africa. This node hosts all tax related information pertaining to your business.
- This node generates:
- Tax Types
- Tax Groups
- Set up a Tax reporting frequency
- Close tax eriods for reporting
- Report on transactions within a tax period
- Report on out of period transactions
- 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.

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# Features table

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

| Base | Sage 200 Evolution |
|---|---|
| Database Manager | MS SQL |
| Delivery Management | Yes |
| Number of users | 1 - 300+ ◊ |
| Number of companies | 2 |
| Number of Financial Years | Unlimited |
| User Defined Fields | Yes |
| General Ledger | Yes |
| Segmented GL Accounts | Yes |
| Cash Books | Unlimited |
| Customers | Yes |
| Quotations | Yes |
| Invoices | Yes |
| Suppliers | Yes |
| Purchase Orders | Yes |
| Inventory | Yes |
| Segmented Inventory Items | Yes |
| Import Cost Allocations (landed cost) | Yes |
| Projects | Yes |
| Report Writer | Yes |
| Stationery Customisation | Yes |
| Alert Manager | Yes |

| Add-On Modules | Sage 200 Evolution |
|---|---|
| Multi-Currency | Yes* |
| Sage 200 Evolution Intelligence Reporting | Yes* |
| Point of Sale | Yes* |
| Debtors Manager | Yes* |
| Bank Manager ǂ | Yes* |
| Multi-Store/Warehousing | Yes* |
| Job Costing | Yes* |
| Bill of Material | Yes* |
| Manufacturing | Yes |
| Lot Tracking | Yes* |
| Fixed Assets | Yes* |
| Payroll | Yes* |
| Sage 200 Evolution CRM Standard‡ | Yes^ |
| Sage 200 Evolution CRM Premium | Yes* |
| Pricing Matrix (Disc. Matrix & Vol. Disc.) ǂ | Yes* |
| Customer Account Consolidations | Yes* |
| Customer Credit Risk Management‡ | Yes* |
| Annuity Billing‡ | Yes* |
| Retail Point of Sale | Yes* |
| Branch Accounting | Yes* |
| Procurement | Yes* |
| Advanced Procurement | Yes* |
| Municipal Billing | Yes* |
| Voucher Management | Yes* |
| Serial Number Tracking | Yes |
| Global Tax | Yes* |

** Purchase as an add-on module*

*• Purchase as a stand-alone module*

*† Annual License Fee product*

*ǂ Available as part of Sage 200 Evolution Core on the subscription model*

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

We see the benefits of Sage 200 Evolution across our Malawian operation. With accurate information, we have better stock and debtor management.

**Peter Ellis**
Managing Director
Macsteel Africa

**Sage Marketplace**
Extend the power of Sage 200 Evolution to more areas of you business by adding an industry-leading add-on, built to help you do business, better.

The Sage Marketplace offers an ecosystem of the most innovative solutions to complement your Sage product. Simply search for solutions by industry, business need or keyword. Find your favourites, and request for more information.

**marketplace.sage.com**

**Annual Subscription**
Sage 200 Evolution Accounting and all modules within the Sage 200 Evolution product range are subject to an annual subscription fee. This business model provides customers with a number of important benefits including updates, upgrades,digital and email support. The compulsory annual subscription 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 digital 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 subscription fee is similar to insurance. It gives you peace of mind that you always hav 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, ensures that your business software will sustain and support continued growth.

Powerful and flexible, Sage’s feature-rich applications are suitablefor 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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# READY TO TAKE THE NEXT STEP?

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