

PRODUCT BROCHURE

## Sage 200 Evolution

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



# 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.

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**MAKE BETTER INVENTORY DECISIONS** with Sage Inventory Advisor's optimised order management and fulfilment processes to minimise stock outs, place orders more quickly and reduce excess stock ensuring continually efficient operations.

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**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



# 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

# Sage 200 Evolution delivers an entire business management solution.



## Features

General Ledger  
Accounts Receivable  
Accounts Payable  
Inventory Control  
Cash Book  
Unit of Measure  
Dimension Items  
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  
SagePay (SA Users)  
Pricing Matrix \*<sup>S</sup>  
Annuity Billing \*<sup>S</sup>  
Bank Statement Manager \*<sup>S</sup>  
Customer Credit Risk Management \*<sup>S</sup>  
Sage 200 Evolution CRM Standard \*<sup>S</sup>

The above features and modules are referred to as the core Sage 200 Evolution system.  
\*<sup>S</sup> These modules are available as part of the core on the subscription model.



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

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

\*\* Requires Sage 200 Evolution CRM Premium module.

<sup>\*S</sup> These modules are available as part of the core on the subscription model.

# 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.

## 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 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, 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 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 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 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

**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



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 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 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

## 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 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 (Only for South Africa)

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. 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.
6. 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.

**Sage 200 Evolution has worked miracles for our month end.**

Kai Esterhuizen, Financial Manager, Dew Crisp

# Features Table

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

		Sage 200 Evolution
<b>BASE</b>	Database Manager	MS SQL
	Number of users	1 - 300+ †
	Number of companies	Unlimited
	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	
Sage Pay	Yes	
<b>ADD-ON MODULES*</b>	Multi-Currency	Yes*
	Sage 200 Evolution Intelligence Reporting	Yes*
	Point of Sale	Yes*
	Debtors Manager	Yes*
	Bank Manager ‡	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.) ‡	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*	
Delivery 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

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

Please refer to the system requirements on [www.sage.com/za](http://www.sage.com/za)

A photograph of two women standing behind a wooden counter in a restaurant or cafe. The woman on the left is wearing a colorful patterned jacket over a white top, and the woman on the right is wearing a blue denim jacket. They are both looking at a tablet computer held by the woman on the right. The background shows a warm, dimly lit interior with wooden beams and hanging lights.

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

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

**sage**



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