



Sage 200 Evolution Hosted Solution

Product Brochure

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



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Sage 200 Evolution Hosted Solution delivers an entire business management solution.

It's the new way to work.

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

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
Tax Module
Visual Reports
Customisation
Pricing Matrix *s
CRM Standard *s
Annuity Billing *s
Sage 200 Evolution
System Audit Manager
Report Writer & Stationery
Bank Statement Manager *s
Microsoft Office Integration
Customer Credit Risk Management *s
GraphsCentral Search and KPI Dashboards



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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*

SAGE 200 EVOLUTION



“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
xRetail 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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SAGE 200 EVOLUTION



Feature 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

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.

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

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 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 for 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.

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.

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 individual document lines
- Reserve stock quantities for customers when they place an order
- Print picking slips and delivery notes
- Create purchase orders automatically using 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

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 & 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 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

Business 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 in 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.

Dimensions of 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 requirement.

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.

Good 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.



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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' 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 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.

Sage200 Evolution

Database Manager	MS SQL
Delivery Management	Yes
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
Aler Manager	Yes

Sage200 Evolution

Multi-Currency	Yes *
Sage 200 Evolution Intelligence Reporting	Yes *
Point of Sale	Yes *
Debtor Management	Yes *
Bank Manager ‡	Yes *
Multi-Store/Warehousing	Yes *
Job Costing	Yes *
Bill of Material	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 *
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

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

SAGE 200 EVOLUTION

Isn't it time you evolve 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 your 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 have 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 suitable for 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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