Your guide to a powerful and integrated business management solution
What our customers have to say

“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

“Evolution has worked miracles for our month end.”
Kai Esterhuizen
Financial Manager
Dew Crisp

“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

“There is no slowing us down, and with Sage Evolution at our side, we’ll be sure to continue taking the market by storm.”
Glyn Jones
Manager
Meridian Holdings
Sage Evolution delivers an entire business management solution

It’s the new way to work

Sage Evolution Standard 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
- Cash Book
- Accounts Receivable
- Accounts Payable
- Inventory Control
- Import Cost Allocations
- Invoicing
- Sales & Purchase Order Entry
- Project Tracking
- Report Writer & Stationery Customisation

- Unit of Measure
- Goods Received Voucher
- Advanced Security
- Microsoft® Office Integration
- Graphs
- System Audit Manager
- Tax Module

Please be aware that these features have limited functionality in Sage Evolution Standard compared to Sage Evolution Premium. Please contact your business partner to determine which product will suit your business needs best.

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

**Add-on Modules**

- Bank Statement Manager
- Bill of Materials
- Multi-Warehousing
- Business Intelligence Centre
- Debtors Manager
- Sage Evolution CRM Standard

- Multi-Currency
- Fixed Assets*
- Pricing Matrix
- Serial Number Tracking
- Point of Sale
- Voucher Management

* These modules can be purchased as stand-alone applications.
Features of the Core Sage Evolution Application

System Manager

The System Manager is the control centre for the entire Sage Evolution Standard 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 Standard 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.

Database System

Sage Evolution Standard takes advantage of the latest database technologies, utilising Microsoft® MS-SQL Server or SQL Express Edition. MS-SQL provides Sage Evolution Standard with the ability to scale and to support an unlimited number of concurrent users. Additional data integrity is ensured through the use of Microsoft® SQL’s transaction rollback feature. Sage Evolution Standard includes MS-SQL Express. Larger sites must purchase MS-SQL Server.

Store Data Indefinitely

The General Ledger stores five years of data and requires no month or year end procedures. You can however, block accounting periods. This prevents transactions from being processed to closed periods. The Subsidiary Ledgers (Inventory, Receivables, Payables, etc.) store information indefinitely.

Transaction Rollback

Data protection and integrity is significantly improved over older database systems. This feature optimises data integrity by ensuring that users will never have incomplete entries or corrupt files, even if they suffer a power failure while a transaction is in progress.

Supports Multiple Companies

The system can maintain multiple sets of books, each with its own chart of accounts. Access to companies and their related functions are password protected. Data can also be copied from one company to another, simplifying the company set up procedure.

Transaction Drill Downs

Drill down functionality allows you to find exactly what you’re looking for. With just the click of a button you can drill down to detailed transactions and the source document from summarised information.
Advanced Security
Every business requires its data to be confidential. You need to control access to this information. Sage Evolution Standard features multi-level, menu-driven password access control. You can establish access control per user. In addition, you can establish user groups and then assign users to a group. Each user who belongs to a group has the same access level restrictions and capabilities. This streamlines the control process and leaves less room for error.

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 modules 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.

Receivables and Payables
Sage Evolution Standard 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. You can create sales codes and assign a commission structure to these codes.

You can also capture multiple transactions within batches to be posted at a later stage. Settlement discounts can be calculated automatically based on the settlement terms set up when processing receipts and payments.

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. The system stores five years of financial information.

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. Each bank account has its own series of cheque numbers. You can make payments to all the major banks via Electronic Funds Transfer.

Sales & Purchase Order Entries
You can maintain and control outstanding orders, processed orders and back orders. This module integrates fully into Sage Evolution Standard’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 Standard'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.

You can include service and physical items which can be flagged as non-commissionable. You can use inventory groups to sort and filter inventory items.

The system allows for multiple selling prices per item. You can link each customer to one of these prices, and you can specify a percentage discount per customer. You can view gross margins and percentage values in the invoice screens and also control pricing by only allowing a minimum gross profit value per inventory item.

Control access regarding who can view costs within the business, by either masking or encrypting cost prices as you deem necessary.

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. Whenever a purchase order is processed against a particular inventory item, the program will default to the buying unit and when selling the item, the program will default to the selling unit. Units can also be set up to round off to the nearest whole unit for easy stock management.

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. The program also recalls the last cost per supplier, for each item when in a Goods Received Voucher.

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.

Extend Sage Evolution Standard'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.
• Bill of Materials allows you to assemble items from components. The system takes the component materials out of stock, and then allows you to create finished items ready for resale
• Pricing Matrix allows you to 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 warehouse.
Add-on Modules

Sage Evolution Standard grows with your business

The utilisation of the MS-SQL database makes Sage Evolution scalable, supporting up to 5 users on Sage Evolution Standard, and up to 1,000 concurrent users on Sage Evolution Premium. In addition, the growth of your business may demand the ability to add new functionality to your accounting system. By using Sage Evolution Standard as the core engine, you can add specialised modules to cater for industry-specific requirements. Developed within the Sage Evolution Framework™, these add-on modules offer complete integration with the core system, as well as a common interface and user experience. Furthermore, all components within the Sage Evolution Framework™ utilise a MS-SQL database ensuring that all your business data resides in one central database.

Business Intelligence Centre (BIC)

What do you get when you combine South Africa’s leading accounting software with Microsoft® Excel? A reporting tool that revolutionises the way you make decisions in your business. If you are comfortable using Microsoft® Excel to share, present and analyse information, Sage Evolution’s Business Intelligence Centre is perfect for you. BIC is an add-on module that dynamically links to your Sage Evolution Standard data, taking your business beyond standard reporting functionality. You generate spreadsheets by simply extracting Sage Evolution Standard data and converting it into an easy-to-read, graphic format. The user-friendly BIC Excel Genie gives you the power to transform data using an intuitive drag and drop interface to construct reports.

BIC 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. Monthly financials account for a large percentage of manual Excel labour. BIC offers a customisable pack which provides drill down functionality.

You can customise the standard set of reports and templates and create new ones. You can be flexible in the combinations of financial data you choose to report on. BIC ships with Management Packs (Balance Sheet, Income Statement), Sales Master (Sales Reports), Inventory, Purchasing options and more.

Sage Evolution CRM Standard (Contact Management)

This unique module has taken the concept of traditional contact management much further by weaving it into the very fabric of the Sage Evolution Standard accounting system. Sage Evolution CRM is a tool that allows you to manage the interaction between your business and your customers, potential customers, suppliers and even your fellow company members.

Any activity that takes place in a business, and is important enough to be tracked, is recorded as an incident. Sage Evolution Standard CRM will track these incidents to their conclusion - or until they are closed off.

Sage Evolution Standard will store incidents even after they have been closed, allowing you to track a history of events as they occurred, as far back as you wish. Using this information, you can track all sales and support activities associated with a customer and the agent or agent group who dealt with the customer.

Incident Graphs

You can view incidents graphically (bar charts) per user, per incident type and per incident status. Graphical representations of incidents give a bird’s-eye view of your business activities, perfect for management. You can even drill down by clicking on a particular area of the chart to see the underlying detail making up the chart.
### Multi-Warehousing

The Multi-Warehousing add-on module allows you to keep inventory items in discrete areas, or warehouses.

You can use warehouses for many types of situations:

- Physical warehouses in different geographic areas
- Keep track of consignment stock/samples in a separate warehouse
- Separate obsolete items into a separate warehouse
- Track demo stock allocated to sales representatives

### Serial Number Tracking

Sometimes you may need to track items individually. For example, if you sell items that have warranties, you need to know when and to whom you sold the item, so that you know whether it is under warranty. For these types of items, you use Serial Number Tracking.

Integrating with Sage Evolution’s Standard’s Inventory module, Serial Number Tracking keeps detailed information on specific inventory items. From purchase to sale, to returns, each item is tracked uniquely, providing absolute control over individual inventory items.

A Serial Number Listing report shows the current location of serial numbered items. For each Serial Number, the report shows the item code and description, the date of its last movement, the current general location in stock and the customer it was sold to.

A Serial Number Transactions report shows all transactions for a Serial Number. Reflecting one transaction per line, each line shows the Serial Number, item code and description, transaction date and reference, the customer/supplier account code and its originating module.

### Point of Sale (POS)

This module integrates with Inventory as well as Receivables, perfectly addressing the practical issues within the Point of Sale environment with powerful reporting features. Functionality includes security parameters, tender types (cash, voucher, credit card or cheque), flexible pricing and discounting. This module supports peripheral devices such as pole display units, cash drawers, slip printers and a bar code scanner. Sage Evolution Point of Sale is user-friendly and offers flexibility by allowing for per-till configuration.

### Fixed Assets

With features like an unlimited number of assets and multiple forms of depreciation, Fixed Assets helps you control your fixed assets easily, affordably and reliably. The different methods of depreciation include straight line, reducing balance, immediate write-off, units of usage, plant & machinery, and equal allowance.

Other key features include:

- Tracking an unlimited number of fixed assets by cost centres or departments
- Group multiple assets into one asset. For example, you can treat five identical desks as a single asset. You can split these at any stage into lesser or individual desks
- Use master and sub assets to add improvements to existing assets and track them together. This is especially useful for computers, where for example you can add additional memory to an existing computer
- Multiple Asset Types
- Capex Budgets and Orders
- Import asset serial numbers and receive a comparative reconciliation report displaying both matched and unmatched records
- Impairment Cost Movements
- Asset Consolidation Listing Report
- Asset Financing Information

Sage Evolution Fixed Assets can be used in conjunction with the core Sage Evolution Standard application or can be purchased as a stand-alone product.
Voucher Management

The process of creating a payment or receipt voucher is an essential function for many businesses and the Voucher Management module helps streamline and automate these processes. This module is suitable for clubs, schools and other organisations where money is collected from members, students or customers and documented proof is required for audit and record purposes.

Main features in Voucher Management
- Role base authorisations, permissions and discretionary limits per user
- Process Accounts Receivable receipts
- Process Accounts Payable payment advices
- Process General Ledger receipts and/or payments
- Support for multi-currency accounts
- Customisable receipts and payment voucher layouts
- Capture and save receipts and payments for future processing
- Maintain and print audit trails
**Debtors Manager**

Debtors Manager provides businesses with a tool to improve debt collection processes through reports which illustrate what actions employees are taking to collect outstanding debts. With Debtors Manager you can turn your debtors department into a communication centre, recording all interactions with clients in a central place. Record the reasons for late or non-payment, the actions to be taken, as well as the due or action dates for follow-up, and then print daily reports with a status of promise to pay dates.

Main features in Debtors Manager

- Management is aware of amounts outstanding by aging period and reasons for outstanding amounts
- Debtors reconciliations are instantly available
- All outstanding accounts can be properly tracked, so the risk of overlooking a debtor for an extended period of time is vastly reduced, eradicating write-offs
- Cashflow forecasts - set targets for collections and manage them against targets
- Increased productivity
- Gives you overall visibility
- Automatic reconciliations for debtors
- Send automatic e-mails to clients withoutstanding amounts
- As the entire process of collection is recorded, there is little chance of unnecessary repetitive work

**Bank Statement Manager**

This module allows for the cash book to be electronically populated when a bank statement is imported where large volumes of transactions are processed. Once verified, the information can be updated to a cash book batch and then to the General Ledger. The bank statements are acquired by using a download facility that's provided by each of the four major banks in South Africa (ABSA, First National Bank, Standard Bank, Nedbank). Supported formats include OFC, CSV and ASCII.

The advantages of using this module include the instant processing and coding of accounts once the initial process of assigning recurring coding has taken place. The process of reconciliation and account coding is virtually guaranteed. Another benefit exists for transactions where the codes have been assigned as per the relevant accounts. Codes need not be assigned a second time – only new transactions have to be coded in the months to follow.

**Multi-Currency**

The Multi-Currency module allows you to process customer and supplier transactions in their preferred currency. Sage Evolution Standard tracks foreign currency, customer and supplier values in both the foreign and the local currency. You can view balances and transactions in either currency at any time.

You can maintain separate buy and sell rates for each currency. Sage Evolution Standard maintains a history of exchange rates so that you can process transactions at earlier dates using the most accurate exchange rate. When you process customer receipts or supplier payments, Sage Evolution Standard uses the current exchange rate to calculate any foreign exchange profit or loss, which it posts automatically.

The Multi-Currency module allows you to:

- Process and print customer and supplier sales and purchase documents in foreign or home currency.
- Print customer and supplier statements, age analysis and transaction reports using foreign or home currency.
- Process foreign currency cash book transactions.
- Create foreign bank accounts and maintain re-evaluations.

**Serial Number Tracking**

Sometimes you may need to track items individually. For example, if you sell items that have warranties, you need to know when and to whom you sold the item, so that you know whether it is under warranty. For these types of items, you use Serial Number Tracking. Integrating with Sage Evolution Standard's Inventory module, Serial Number Tracking keeps detailed information on specific inventory items. From purchase to sale, to returns, each item is tracked uniquely, providing absolute control over individual inventory items.

A Serial Number Listing report shows the current location of serial numbered items. For each Serial Number, the report shows the item code and description, the date of its last movement, the current general location in stock and the customer it was sold to.
A Serial Number Transactions report shows all transactions for a Serial Number. Reflecting one transaction per line, each line shows the Serial Number, item code and description, transaction date and reference, the customer/supplier account code and its originating module.

Bill of Materials
Designed for the manufacturing and assembly environment, this module allows you to create assembly sheets (or Bills as they are commonly known) detailing each component making up the completed item. Completed items can be manufactured before they are sold or you can simply invoice the completed item and Sage Evolution will manufacture the item on-the-fly, at which point the sub-components will be drawn from stock.

You can manufacture items in a single operation, or for more complex manufacturing and for processes that occur over a significant period of time, you can work on an open manufacturing process.
# System Requirements

<table>
<thead>
<tr>
<th>Section</th>
<th>Single User</th>
<th>Workstation</th>
<th>Server (Max 5 users)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hardware</strong></td>
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<tr>
<td>Minimum</td>
<td>Single Core 1Ghz</td>
<td>Single Core 1Ghz</td>
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<td>Recommended</td>
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<td>Dual Core or more 2Ghz or faster</td>
<td>Quad Core or more 2Ghz or faster</td>
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<td><strong>PLEASE NOTE:</strong> 32-bit (x86) and 64-bit (x64) processors are supported.</td>
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<tr>
<td><strong>Operating System</strong></td>
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<td>Minimum</td>
<td>Microsoft® Windows 7</td>
<td>Microsoft® Windows 7</td>
<td>Microsoft® Server 2008 R2</td>
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<tr>
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<td>Service Pack 1 or later</td>
<td>Service Pack 1 or later</td>
<td>Service Pack 2 or later</td>
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<tr>
<td>Recommended</td>
<td>Microsoft® Windows 7/8</td>
<td>Microsoft® Windows 7/8</td>
<td>Windows Server 2008 R2</td>
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<tr>
<td></td>
<td>Service Pack 1 or later</td>
<td>Service Pack 1 or later</td>
<td>Service Pack 2 or later</td>
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<tr>
<td><strong>PLEASE NOTE:</strong> Windows XP Home, Windows 7/8 Starter and Windows 7/8 Home Premium editions are not supported by Sage Evolution.</td>
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<td><strong>RAM</strong></td>
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<td>Minimum</td>
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<td>Recommended</td>
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<td>6GB or more</td>
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<td><strong>Screen Resolution</strong></td>
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<td><strong>Database Server - Recommended</strong></td>
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<td>Service Pack 1 or later</td>
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<tr>
<td>Microsoft® SQL Server 2012</td>
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<tr>
<td><strong>Additional Software Requirements (Server and Workstation)</strong></td>
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<tr>
<td>Minimum</td>
<td>Microsoft® Excel 2007 or later (for the Business Intelligence Centre module)</td>
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<tr>
<td>Minimum</td>
<td>.Net 4.00 Framework (included in installation disc for Bank Manager and Cash Manager modules)</td>
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<tr>
<td><strong>Additional Important Information</strong></td>
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</table>

We strongly recommend you speak to your Sage Evolution Business Partner regarding the system requirements recommended for your specific environment.

**Other System Requirements**

- DVD Rom
- 256 Colour VGA or SVGA Graphics. Graphics card: Microsoft DirectX 9 graphics device with WDDM driver
- To use touch capabilities in Windows 8, you need a tablet or a monitor that supports multi-touch
- The online help requires Internet Explorer version 6 or higher, or a compatible browser
- Up-to-date network drivers, service packs and updates for your network and operating systems
- Windows 7 & 8 personal computers/notebooks need to ensure that the recommended RAM memory requirements and Video Graphics adapters are met
- The above serves as a guideline. Hardware requirements may differ depending on the operating system and the version of SQL Server
- For Microsoft® SQL Server 2012, please note that there are additional software requirements to adhere to. Please refer to the SQL Server specifications document for more information
### Comparative Features Table

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

<table>
<thead>
<tr>
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* Purchase as an add-on module
† Annual License Fee product
‡ Available as part of Sage Evolution Core for International versions.
** Can sell items but does not control costs or quantities
*** 5 years worth of transactions are stored, but only 2 years are available for processing and for standard reports, available through the View menu
† Annual License Fee product
∆ Limited functionality
≈ Available as an add-on module for International Partner versions.
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 Standard and Sage Evolution Premium - 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?