Sage Pastel Evolution Add-On Modules Training

Annuity Billing

Explains how to create recurring invoices for your customers. Recurring invoice templates are also discussed.

Duration: ½ day course

Bank Manager

Covers how to download and import your electronic bank statement into the system. An explanation is given on how to create recurring entries and how this add-on module eases the reconciliation process.

Duration: ½ day course

Bill of Materials (BOM) & Manufacturing

Explains how the two add-on modules work together to effectively assemble and manufacture items. The manufacturing process is explained. The process on how to create a bill containing different items is also explained.

Duration: 1 day course

Debtors Manager

Will show you how to use the Cash Manager add-on module to effectively manage your debtors' age analysis.

Duration: ½ day course

Credit Control

Covers how to use the Credit Control add-on module to streamline your customer credit applications.

Duration: ½ day course

Delivery Management

Businesses that manage large items or quantities of inventory items from point of sale to on premise deliveries can now easily manage their processes from dispatch to the customer. The delivery module seamlessly integrates into Pastel Evolutons Retail Point of Sale, Sales Order and Invoicing Modules allowing for items to be flagged for collection or delivery at time of sale.

Duration: ½ day course

Fixed Assets

Details the set up, processing and reporting requirements available for your assets. Depreciation methods are explained and demonstrated. It further explains how you can create and link sub assets to master assets as well as keep track of your assets using the Asset Tracking feature.

Duration: 1 day course

Job Costing

Explains how to set up job defaults. Thereafter, explanations are given on how to create and process jobs and job cards as well as how to link the various item and labour elements to them.

Duration: 1 day course

Linked Accounts

Explains how this add-on module integrates with the Accounts Receivable module by linking customers in a head office / branch relationship. Processing abilities are also explained and demonstrated as to how transactions reflect in the head off / branch relationship setup.

Duration: ½ day course

Lot Tracking

Explains how this add-on module allows you to track your items in lots/batches. An explanation is also given on how to assign expiry dates to your lots.

Duration: ½ day course

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Managing Director: T. Webster

Multi-Currency

Illustrates how to create and process different foreign currencies for customer, supplier and item transactions.

Duration: ½ day course

Multi-Warehousing

Outlines the fact that multiple warehouses can be created when using this add-on module. It is brought to your attention that for each warehouse, different items and item prices can be allocated. The Goods in Transit (GIT) feature is explained as well as how you can manage damaged items and item variances for reporting purposes.

Duration: ½ day course

Point of Sale

Starts by introducing you to the elements of a retail environment and continues to explain how to process cash and account sales using this add-on module. Emphasis is put on the detailed reports and other management tools that are available for accurate cash-up and till reconciliation processes.

Duration: ½ day course

Pricing Matrix

Explains how to create different pricing/discount matrices for your customers and suppliers as well as how to set up powerful date driven volume discount contracts.

Duration: ½ day course

Procurement

Explains how to use this add-on module to enhance your purchase order and requisition processes in your business. It explains that this Procurement add-on module is dependent on the Contact Management add-on module for authorisations and notifications between the agents.

Duration: 1 day course

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Serial Number Tracking

Explains how to set up and create serial number items. It is further discussed how the system keeps a full history of each serial number item's movement into and/or out of the business. Powerful reports are introduced.

Duration: ½ day course

Contact Management

Focuses on how to manage your internal contact and communications by creating and using incidents, workflows, escalation hierarchies and time allocations for tasks. The benefits of this module are discussed and demonstrated.

Duration: 1 day course (combined with Sales Force Automation)

Sales Force Automation

Introduces you to the features and benefits of this powerful sales management tool. The setup and processing abilities are demonstrated, such as sales steps, prospective customers, probabilities and so on. It also explains how this module is dependent on the Contact Management and Procurement add-on modules.

Duration: 1 day course (combined with Contact Management/Resolve)

Entrance Requirements for Add-on Modules

Learners need to meet the following prerequisites before attending the Sage Evolution Add-on Modules courses:

1. Bookkeeping NQF Level 3 qualification or Standard 8/Grade 10 Bookkeeping

2. Computer Literacy at NQF Level 3 or Standard 8/Grade 10 Computer Literacy

3. Mathematical Literacy or Standard 8/Grade 10 Mathematics

4. Sage Evolution Premium Practitioner Course (EPCP – Learning Unit 1)

If you are not yet competent in the required prerequisites, you must first complete the relevant courses before enrolling for this course. It is essential that the course prerequisites are met so as to avoid being asked to leave and the course fees being forfeited.

Assessments

The Assessment has to be written within 6 months from the commencement date of your training. To make it easier for you, all the Sage Pastel assessments are now online. This means that you can write the assessment in your own time and in the comfort of your own home provided you have a computer with internet access.   Assessments are offered only in English.