

COURSE OUTLINE

Sage Evolution Premium Product Consultant (LU 2)



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Course Outline

This comprehensive training course will give you a broad overview on how to use your Sage Evolution Premium software.

Course duration

This course is scheduled for five days (30 hours).

Course pre-requisites

Learners need to meet the following prerequisites before attending this course:

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

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.

Documentation

The following documentation is included with the course

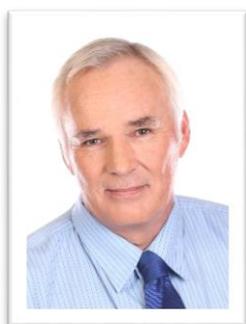
- Learning Unit 2 user guide
- User competency assessment
- Certificate of attendance

Who should attend?

If you have an established Pastel Evolution background and would like to specialise in Pastel Evolution's add-on modules, this course is for you.

The Facilitator

Werner Muller



Werner Muller has been active in Sage 300 ERP for twelve years and in this time has obtained a lot of practical and theoretical experience - with 30 years of accounting experience.

He comes from a corporate and training environment where he was a junior lecturer for statistics and applied maths. He completed his articles at Theron van der Poel and attended the University of Pretoria where he studied B-Com Auditing. He is dedicated to training since it is his passion to deliver effective meaningful skills and to uplift all the students coming through our AccTech Systems training centre.



Topics Covered

This course will explain the detailed set up, processing and reporting aspects of the Pastel Evolution add-on modules. An overview of each add-on module's course content is explained below:

Annuity Billing

The Annuity Billing content explains how to create recurring invoices for your customers. Recurring invoice templates are also discussed.

Advanced Procurement

The Advanced Procurement module allows you to manage and streamline your purchase order, requisition and tender processes. Manage requests for quotations from suppliers and allow the system to help you choose the most appropriate supplier quote based on criteria predefined by you. Analyse your supply chain and evaluate your supplier's performance on a rotational basis by sector or specified supplier criteria. Effectively managing these processes assists you to establish credibility in the market place with your respective suppliers & stakeholders.

Bank Manager

The Bank Manager content 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.

Bill of Materials and Manufacturing

The BOM and Manufacturing content 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.

Cash Manager

The Cash Manager content will show you how to use the Cash Manager Add-on module to effectively manage your debtors age analysis.

Credit Control

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

Contact Management

The Contact Management content focuses on how to manage your internal contact and communications by creating and using incidents, workflows, escalation hierarchies and time allocations to tasks. The benefits of this add-on module are discussed and demonstrated.

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 Evolution's Retail Point of Sale, Sales Order and Invoicing Modules allowing for items to be flagged for collection or delivery at time of sale.

Fixed Assets

The Fixed Assets content 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.



Global Tax (International)

The Global Tax add-on module is for countries that require the Withholding Tax policy to be applied at the time of purchasing from suppliers. This module allows the Withholding Tax amount to be derived and calculated using the specified tax percentage specified for the qualifying supplier allowing you to make the payment to the relevant revenue authorities.

Job Costing

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

Linked Accounts

The Linked Accounts content 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 office / branch relationship setup.

Lot Tracking

The Lot Tracking content 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.

Mobile Sales (iPad/Android)

This course aims to direct you to understand, prepare, and set up your mobile architecture to ensure uninterrupted communication between the device and the database.

Multi-Currency

The Multi-Currency content illustrates how to create and process different foreign currencies for customer, supplier and item transactions.

Multi-Warehousing

The Multi-Warehousing content 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.

Point of Sale

The POS content 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.

Pricing Matrix

The Pricing Matrix content 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.

Procurement

The Procurement content 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.



Sales Force Automation

The Sales Force Automation content 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.

Serial Number Tracking

The Serial Number Tracking content 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.

Service Management

The Service Management add-on module allows you to manage, track and analyse the servicing of assets. These can be your assets or your customers assets. The servicing may be set up within a Service Level Agreement (SLA) environment.

Voucher Management

Some businesses require payment and receipt vouchers, such as schools and clubs who collect money from members. This Voucher Management add-on module assists in streamlining the issuing of these vouchers.

Venue Details

We have training facilities in Centurion.

Centurion

1001 Clifton Avenue
Lyttelton Manor
Centurion

For bookings or more information

For bookings or more information please feel free to contact us at 0861 11 1680 or e-mail training@acctech.biz

For the latest event schedule visit our training page on www.acctech.biz

