Sage Pastel Version 18

Microsoft Office 365 Integration

Version 18 of Sage Pastel Accounting integrates with and leverages the power of the Microsoft Office 365* platform to deliver exciting and innovative features to Sage Pastel customers, while providing real business value.

This enables customers to get the most out of Office 365 for their business, with access to key information and insights from the Sage Pastel Version 18 desktop, as well as across mobile devices and laptops when they're out of the office.

*Works with Microsoft Office 365 Business Premium

Solving real customer problems

Version 18's integration with Microsoft Office 365 addresses the following issues:

• Poor Microsoft Office integration
• A lack of business performance insight
• A reliance on paper
• The need for Cloud and mobile access

Sage Pastel Partner: Version 18 goes to market in October with two new features and plenty to follow in 2018:

1. Sage Contact

The Sage Contact add-on is accessed from Microsoft Outlook, providing specific "at-a-glance" information about a contact (customer or supplier) with no need to switch between different applications.

Features:

• Integration of Sage Pastel Partner data directly within Microsoft Outlook.
  Providing a modern user experience for organising communication in a natural and
  fully integrated way.

• View key information alongside email conversations. Work with data at a glance for
  faster decision making and the ability to identify new business opportunities. This
  data includes invoice and payment history, communication history, credit limit and
  contact information.

• Contact synchronisation between Office 365 and the Sage Pastel desktop.
  This allows customers to work from any location, and in any way they choose, with
  updates made available via desktop and Cloud.

• On premise and online access to Microsoft Office 2016.

2. Sage Backup

Sage Backup integrates directly into Sage Pastel Version 18, enabling
customers to schedule Cloud backups to Microsoft OneDrive, and configure
notifications directly from the desktop.

Features:
• Support for single and multi-file backups generated in Sage Pastel V18.
• Schedule the time, day and frequency of backups.
• Receive email notifications to confirm backups have completed.
• See previous backups in Microsoft OneDrive.
• Share backups with accountants and stakeholders directly from Microsoft
  OneDrive.
• Restore backups when you need them. Microsoft – OneDrive is available 24/7,
  365 days a year.

3. A New UI

Sage Pastel Version 18 sports a fresh, modern user interface (UI). This latest
design, enhances the visual experience by incorporating recent trends with strong
references to the Sage brand, while still providing the same rock-solid and
feature-rich engine that customers have become accustomed to.

This new UI forms part of Sage's strategy to unify the user experience across the Sage product portfolio, providing a more consistent experience for customers. Application navigation has also been improved with labelled icons and accentuated screen elements to highlight the ideal flow of processes.

Sage values the way users entrust their business financials to us and this latest round of enhancements will make their daily interaction with Sage Pastel easier and even more enjoyable.

4. New Search Screens

The existing "Zoom" screen is designed to find records by code or description in a left-to-right pattern, for example, if a customer is trying to find a stock item called "ACB, 40" Pipe Clamp- LHS", they would have to know how the description is formatted and search for at least "ACB,". There could be thousands of items that start with "ACB", because the items were described with the supplier code "ACB" as a prefix.

Often when stock is captured little thought is given to how a person would need to search for it, the expectation being that a person would be able to search for a term like "pipe clamp" and the system would return all items that referenced this phrase anywhere in their description.

Although the current "Zoom" offers a more advanced "Find" option as a second level of search, this feature is not easily discoverable and is extremely slow and cumbersome to use.

The new search screen within Sage Pastel Version 18, however, offers an automatic "wildcard" search across any number of fields and is much faster.

It is also customisable in terms of which fields need to be displayed or searched on, and has a second level of detail that can be expanded to show store specific information, e.g. stock on hand at each branch.

This new search screen also includes additional filtering, grouping and sorting options and the ability to export results directly to an Excel workbook, if required.

For inventory and/or customer intensive users, with thousands of stock items or hundreds-to-thousands of customers, the new search screen offers a far quicker, more intuitive experience.

5. Enhanced Payroll and Accounting Integration

Payroll integration within Version 17 of Sage Pastel is currently fragmented and difficult to set up. Integration within Version 18, however, takes the form of an assistant- based configuration which ensures an easier setup process for customers.

General ledger accounts from accounting packages are also easily available for selection from the payroll product.

6. Enlarged Processing Screens

Historically, on certain processing screens one had to scroll from left-to-right to view information, resulting in a poor usability experience. For this reason, the following screens have been widened:

- Time and billing
- Receipting
- Manufacturing

7. In-app Password Reset

In the past, when customers forgot their passwords they would have to send Sage their data for a data fix. With Sage Pastel Version 18, passwords can be reset within the software.

8. Capitec Bank Statement Import – Bank Manager

Capitec customers using Bank Manager in Version 18 can now easily import their statements using the Capitec OFX format.

9. Sage Pay Bank Feeds

Customers using Sage Pay can map their Sage Pay transactions in Bank Manager once and all future transactions will be allocated to those general ledger accounts.

New transaction types added by Sage Pay in the future, will be catered for via the live feed.

10. My Customers' Zone – Payment Gateway

A new payment gateway has been added to the My Customers' Zone. Giving African countries the ability to allow customers to pay invoices and statements online.

Regions covered include:

• Europe
• South Africa
• Kenya
• Nigeria
• Botswana
• Zimbabwe
• Mauritius
• Tanzania
• Namibia