What’s New:

Sage 200 Evolution
Version 9.20
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New Installation

The installation of Sage 200 Evolution can now be done in a few easy steps.

Prerequisites for MS SQL Express 2014 installation include:
- Microsoft .NET Framework 3.5 SP1
- Microsoft .NET Framework 4.0
- Windows PowerShell 3.00

The user will have an option to allow the installation to set the Windows Firewall settings. After installation there is an option to run Sage 200 Evolution and a full log of the installation is available.

Sage 200 Evolution is compatible with SQL 2017.
New Database Create Wizard

At time of creating the database, you will be requested to select a country. Options are available for South Africa, Australia, New Zealand, Middle East, Malaysia and Other.

The country selection was previously captured on installation.

The number of screens to create a database have been reduced.

The default Admin password will be displayed to the user and the system will also allow the password to be set.

Once all the steps for creating the database have been completed, the Admin user and default password as set up by the user will be automatically filled in on the Log In screen.
User Interface Refresh and Navigation Enhancements

You will be presented with a new look in Sage 200 Evolution.

A new icon set has been designed to modernise and refresh the interface. Added features to the working area include Process Flows and Related Tasks.

System tree node names have changed when only creating a new database.

Accounts Payable is now named Suppliers/Purchases and Accounts Receivable is known as Customers/Sales.

Some screens have been logically regrouped. An example is the invoice, it will now be available on the Inventory as well as the Customers/Sales option.

Screens can be easily found with the new Filter added in the system tree. Type the required name, it will filter in your accessible System Tree and list the results. Use Ctrl+Enter to invoke the screen.
Quick links to reports are available in the working area. Simply type the report name and click Run Report.

Use the Recently Used section to easily access recently used areas.

All maintenance and enquiries grids will allow the user to multi select the records and use Ctrl+C on the keyboard, or use the right click option to Copy to Excel.

On the Inventory Item, Customer, Supplier and General Ledger Account maintenance grids a new type of grid is used to better handle large sets of data.

In form Navigation available on maintenance forms to navigate to the next, previous, last or first records.

Option also available to create new from the maintenance form by selecting the ‘+’ sign.

Tabs displayed on left and no longer at the top of forms.

New permissions added to limit agent access per lab.
Scheduled Backups

Within **System Tools**, an option is available to either Backup or Restore the current database.

You will also use **Job Manager** to schedule backups.

User Defined Field Enhancements

User Defined Fields on documents now can track changes. Previously the field was added to the document master table, in Version 9.10, the user defined field values are stored in a separate table. Due to the new structure, when document user defined values are changed, the changes can be tracked.

As example, add a user defined field to indicate lead time from the supplier on the purchase order. When the document is created, a lead time of 10 is added. After communications with the supplier the lead time can be amended to 15. Now a report can be created to indicate the initial lead time and the amendments made afterwards.

Data Entry Enhancements

To make maintenance of Masterfile data easier, new Quick Entry options have been added to Supplier Groups, Customer Groups, Inventory Groups and Inventory Items.
Data Entry Enhancements (Continued...)

- Use the multi select option on the grid to edit specific records.
- Enter new records in the grid directly or use copy and paste functions to copy data from Excel and paste into the grid.
- Use the option on the right click menu to ‘Copy Down’ values. To copy from Excel, create records using the exact heading names of the columns in the Quick Entry grid.

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
<th>Sales Account</th>
<th>Prompt Sales Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>LG</td>
<td>Live Grade Goods</td>
<td>Sales</td>
<td>TRUE</td>
</tr>
<tr>
<td>HQ</td>
<td>High Grade Goods</td>
<td>Sales</td>
<td>TRUE</td>
</tr>
</tbody>
</table>

- Changes will be indicated in red. Validations are done for duplicates and valid data.
- Save will update or create the new records.

On inventory items more options are available.
- Use the grid to customise your results, then use Quick Entry to only edit the selected records.
- The Price fields can be changed.
- In the below example, records were pasted from Excel and changed indicated in red (on the next page).
Records do not have to be visible in the Quick Entry grid to be updated. If values are found when pasting that do not exist in the current list, they will be added.

When adding inventory items, normal rules will apply when the record is marked as a Warehouse Item. If the warehouse is setup with the option to always add new items to the warehouse, the Quick Entry will add the items according to that setup.
Inventory Enhancements

The tables that store the inventory items have been modernised and enhanced to improve speed on big datasets. The time it takes to add inventory items that belong to multiple warehouses have been drastically enhanced. Processing speeds have also improved due to the structural changes.

These changes will however, impact on your customised reporting solutions.

These changes allowed for new features that were added to the module.

- Multiple Barcodes specified per inventory item.
- Barcode per Unit of Measure.
- Price per Unit of Measure.

An overall look at the pricing capabilities:

- These prices can also be updated using the ‘Copy from Excel’ option.
- A new menu option the task bar from Inventory | Maintenance | Inventory Items have been created to allow the user to directly access the prices of the item.
- Prices can be created for the item that will be applicable across all the warehouses.
Due to the structural changes on inventory items and prices, data upgraded from previous versions might contain extra records that can be removed.

In the **Global Item Change** function, a feature is added to Diagnose the current price lists in the database and run a clean-up procedure to remove irrelevant price records.

- Price Update Batches can be scheduled using Job Manager.
- Prices can be updated from an import file in the batch.
- Prices can be updated for an item though the price list records that does not exist yet.
- Records for pricing is only added when the prices are added to the item, not at the item creation stage.
Within the Price Update Batch, values in the grid can be copied to Excel, changes made to the prices, and copied back from Excel.

- New option added on Inventory Defaults to set the default inventory group for service items when creating a new item.

  At time of creating the item, the group will be set to the inventory group selected in Defaults.

- On a new database that is created, a new inventory group will be created by default for service items.
Multiple Bin Locations Per Warehouse

- Allow the use of Multiple Bin Locations per Warehouse.
- Enable on Warehouse Defaults.
- Per warehouse, set a default selling and purchasing bin.
- Per item, per warehouse, set a default selling and purchasing bin.

- Link a bin to a warehouse, to an inventory item.
- Set Min and Max Levels per bin.
- Default Sales Bin and Default Purchase Bin per item, per warehouse.
Multiple Bin Locations Per Warehouse (Continued...)

On each Transaction screen, enter the Bin Location if a warehouse is selected that allows for multiple bin locations.

Transfer bin quantity from a bin location to another bin location.
**Item Categories**

A new functionality is added to link inventory items to inventory item categories. Inventory reports can be filtered according to Item Category.

For upgrades from previous versions of the product bin locations are now referred to as Item Categories.

Bin location values captured in previous version of the application are changed to Item Category values. All links to inventory items will be maintained.

**Inventory Item Attributes**

Define attributes for inventory items for more accurate reporting and maintaining of inventory items.

Create an attribute group with attribute types defined, thereafter link attribute values to types.

An example to illustrate the capability of attributes:

Selling clothing and mobile phones.

Create attribute types for:
- Colour
- Make
- Model
- Size
- Style
Inventory Item Attributes (Continued...)

Attribute values to use with these types:

- Blue  Colour
- Red  Colour
- Yellow  Colour
- Nokia  Make
- Samsung  Make
- 1100  Model
- 1200  Model
- 1400  Model
- 10  Size
- 12  Size
- 14  Size
- Summer  Style
- Spring  Style

Defining the attribute group that will be linked to the inventory item:

Fixed and Variable Entry Types can be linked to an attribute group.
Create an item and link it to the attribute group of choice.

At point of transaction, the user will receive a prompt to enter the Variable attribute value.

Transaction is recorded against the attribute set and quantities will reflect at attribute level.
Customer and Supplier Document Enhancements

Find customer and supplier documents easily. Navigate to **Inventory / Transactions / Inventory Document Maintenance**. Search either for customer or supplier processed and unprocessed documents. Once the document is located, load the source document.

Reprint a range of customer or supplier documents using the **Inventory / Reports / Reprint Documents**.
Report Builder Enhancements

With Sage 200 Evolution, a new version of Report Builder is shipped. This allows for better formatting when printing to Excel. Column header and column formatting is maintained. Extra options at time of printing to file allows for more capabilities.

- Select XLS Report File.
- Select Advanced Options.
- Options available to print the headers and footers once.

Setup Enhancements

An option is available on the General Ledger Accounts to bulk update ledger accounts to set the Allow Journals flag. Filter the ledger accounts and update the filtered records to set the flag to allow journal posting.
Interest Charging Enhancements

- New option added to increment the reference number when posting the interest transaction.
- The transactions for interest are now flagged in the customer transaction file to indicate an interest charge.
- You will be informed if an interest transaction is posted more than once for the same customer in the same period.

Rename Utility Nodes

The multiple nodes within the Utility have been merged. A single screen is presented to the user and changes that are allowed will be indicated. As example, change the Description and Reference values in the grid.
Database Synchronisation

Various enhancements have been made to the Sync Monitor for an offline Branch Accounting environment.

These include:
The XML file that carries branch and sync information, is now cleared after each successful import. This will keep the size of the file to a minimum.

A service application is available that can be configured to start up the Sync Monitor at the correct interval, process the files in the queue and close the Sync Monitor when done.

With each synchronisation process, the records between branches and the head office are compared. If any discrepancies are found, records will be synchronised again. This feature is optional.

Separate technical documentation is available for further details.

SQL Server 2017 requires write access to the NT Service\SQLSERVERINSTANCENAME to any folder that will be used as a backup location.

Technical Advisory – Add-On Module Installation

Modules that will now load in the system tree as an Add-On module using the UIAPI:
• Voucher Management
• Inventory Issue
• Delivery Manager
• Global Tax
• Inventory Optimisation
Maintenance

Items addressed in the release:

• IS-11871 – Delivery Notes will now print from Retail Point of Sale if setup.

• IS-11395 – Correct ageing details will be updated when editing a supplier

• IS-11162 – MRP report will now apply the correct grouping of components for printing

• IS-12004 – A Custom type installation in Version 9.20 did not have the Retail POS till option listed as a component for deselection.

• IS-10651 – Serial Number Report not printing for segmented serial number item.

• IS-12034 – The ability to specify a Sales Representatives on Document or Document lines is now available on Sage 100 Evolution.

• IS-12129 – On a Billing Run an invalid column name iBasicChargerateTarrifId appeared.

• IS-11619 – A syntax error appeared on searching for General ledger accounts that had User Defined Fields.

• IS-12040 - The status of the manufacture process remained active even though the manufacture process had been completed when using the option to Allow Over/Under Manufacture.

• IS-12033 - Lot numbers with zero quantities will now be available for selection on Inventory Journal Batch.