

sage Pastel Accounting

***17 Reasons to
Upgrade
to Version 17***

Table of Content

1. Scheduled Invoices	4
2. My Customers' Zone	4
3. Bank Feeds	5
4. Sage Pay for Bank Manager	5
5. Mobility	6
6. A fresh new upgrade experience via the Auto Update feature	8
7. Easily create cash books from the Edit General Ledger Accounts screen.	8
8. Date and Timestamp on the backup	9
9. Password protect your backups	9
10. New Icons	10
11. Favourites option.....	10
12. Forms Assistant	11
13. User Access Report	12
14. Live Chat (South African customers only)	12
15. Online Help	13
16. View Open Batches.....	13
17. Sage Pastel Intelligence Reporting – Report Utility.....	14

Sage Pastel Partner Version 17 has many great new features. This article briefly explains the benefits you the user will get when upgrading to Sage Pastel Version 17.

1. Scheduled Invoices

If you process identical invoices monthly for the same customers, or you have different invoicing dates for batches of customers with the same invoices, then Scheduled Invoicing is the module for you.

You can link customers to a specific invoice and select a specific date, be it weekly, monthly or annually to invoice these customers. This is only available in Sage Pastel Partner V17.

2. My Customers' Zone

Take your business to the cloud with My Customers' Zone, and allow your customers to view their invoices and statements any time, from anywhere in the world on line.

The screenshot displays the Sage Pastel Accounting web interface. At the top, there's a green navigation bar with 'Home', 'Accounts', 'Contact Us', and 'Logout'. Below this, the page title is 'Copy Tax Invoice - INV0000000086'. The main content area is divided into two columns. The left column, titled 'Bill To:', contains the address for Energy Telecoms Ltd. The right column, titled 'Our Details', contains contact information for Evolution Statements. Below these, a table lists invoice details including Date, Document Number, Debtor Ref, Contact Person, and Telephone. At the bottom, a table lists line items with columns for Code, Description, Quantity, Unit Price, Tax, Discount(%), and Amount(excl). The total amount is R 228.00. At the bottom right, there are buttons for 'Print', 'Save', 'Payment History', and 'Pay Invoice', along with the text 'Outstanding Amount R 228.00'.

Date	Document Number	Debtor Ref	Contact Person	Telephone
09 Mar 2015	INV0000000086		Harry Belafonte	+27 21 880 9000

Code	Description	Quantity	Unit Price	Tax	Discount(%)	Amount(excl)
1000	Sony Ericsson P990	1.00	R 100.00	R 14.00	0.00	R 100.00
1002	As long as a Pastel Evolution product descr can be	1.00	R 100.00	R 14.00	0.00	R 100.00
Sub Total						R 200.00
Tax						R 28.00
TOTAL (incl)						R 228.00

Print Save Payment History Pay Invoice

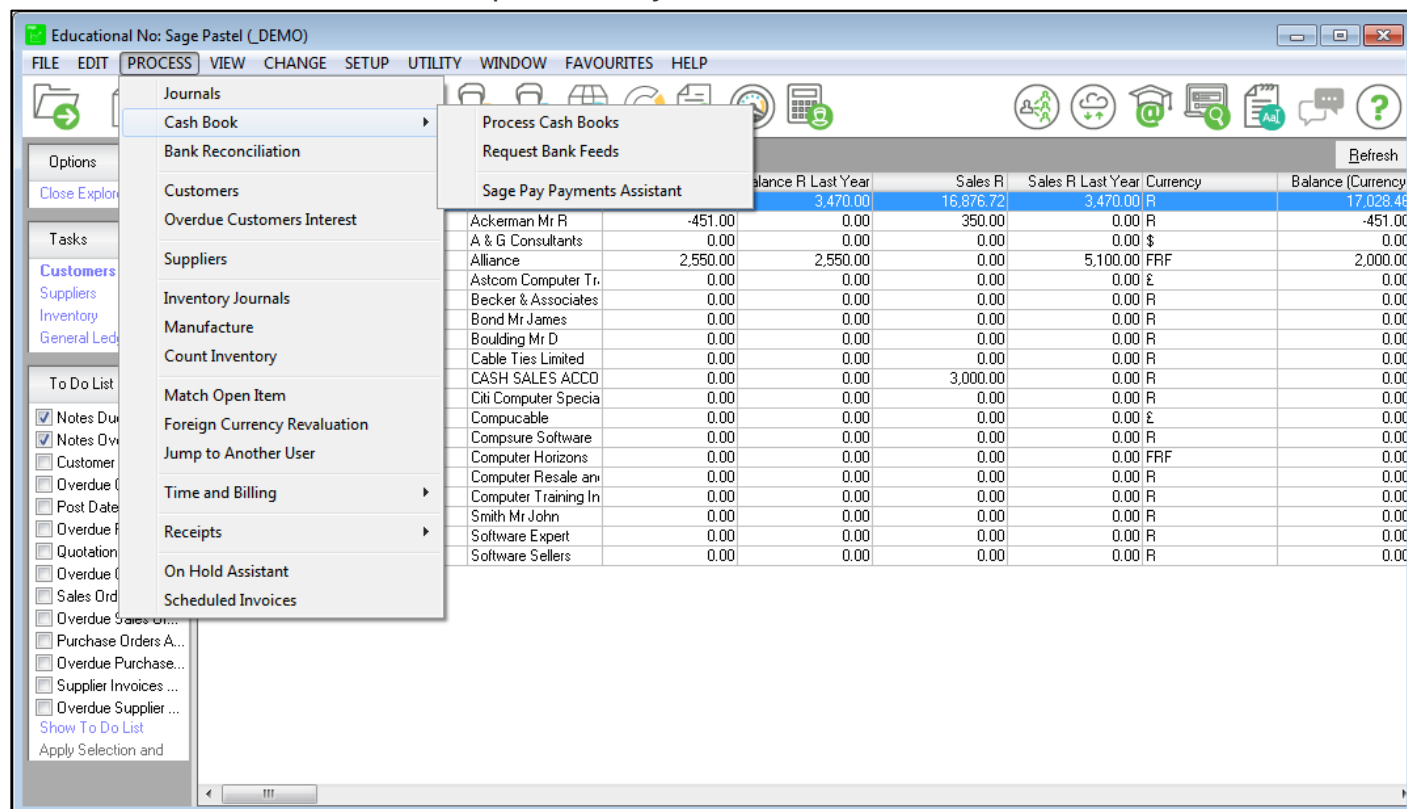
Outstanding Amount R 228.00

Combined with Sage Pay, customers can also pay their invoices online. All that is required is an internet connection, a browser and login details.

Further to this, you can customise your branding on the invoices and stake your claim in the world of online trading.

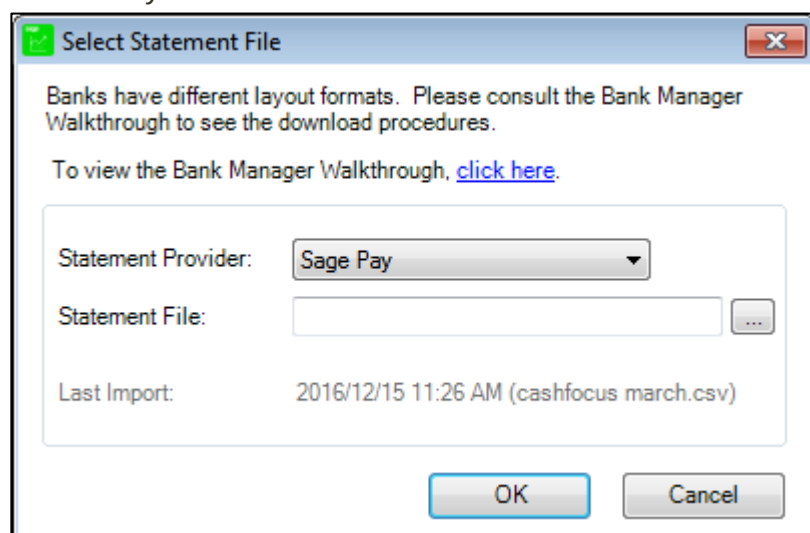
3. Bank Feeds

Import your bank statement daily with a simple click of a button. Request a Bank Feed, and moments later the batch will be imported into your cash book. No mess. No fuss.



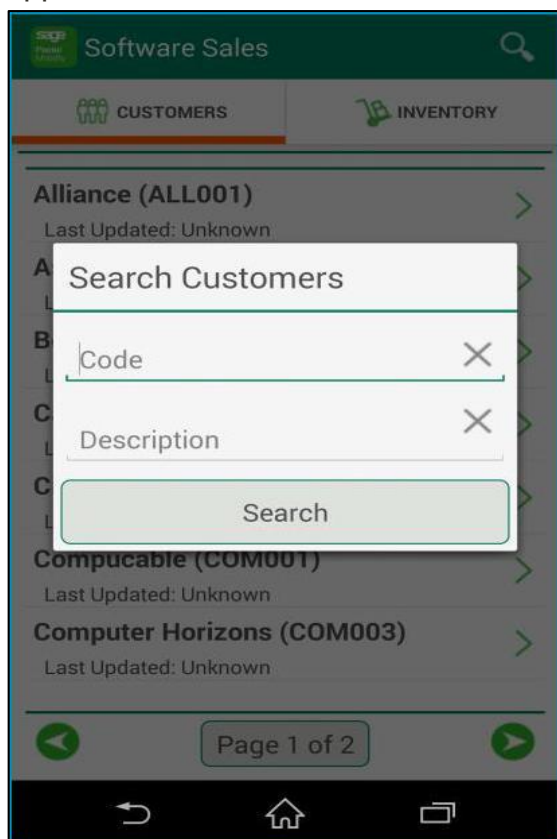
4. Sage Pay for Bank Manager

If you make use of Sage Pay, you will have automatic access to Sage Pastel Bank Manager, allowing you to effortlessly import your Sage Pay statements into Bank Manager and easily reconcile your cash books.

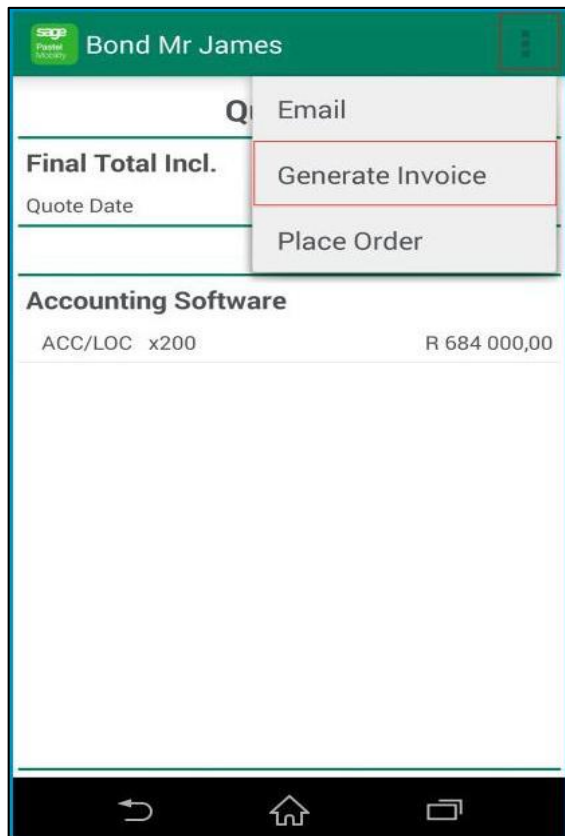


5. Mobility

We have made some enhancements to Sage Mobility to give your sales team in the field the edge! Users are now able to search for customers and inventory on their smart devices using the Mobile app.



Quotations and Invoices can be processed and updated from the smart device:



Once generated, the document can be emailed to the customer from the smart device.

Sage Pastel Mobile Bond Mr James

Inv Email

Final Total Incl. R 684 000,00

Invoice Date 22 April 2015

Items

Accounting Software

ACC/LOC x200 R 684 000,00

Navigation icons: back, home, recent apps

Users can also change the passwords from their smart device after the device has been registered on your system.

Sage Pastel Mobile Settings

Change Password

Old Password

New Password

Confirm New Password

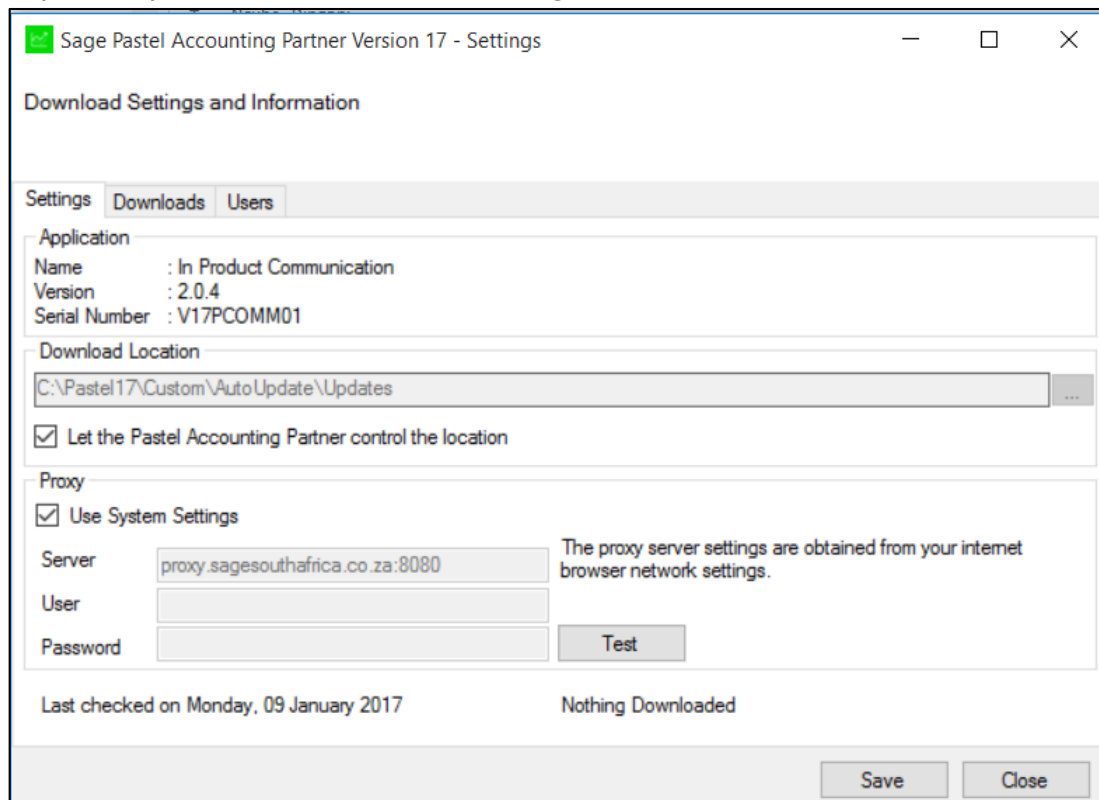
Save

Navigation icons: back, home, recent apps

6. A fresh new upgrade experience via the Auto Update feature

Network went down during an update download? You can now resume downloads that may have been interrupted by forces outside your control. So say bye-bye to broken downloads and hello to a new pain free update download experience

You can now setup which users can download and install updates, or allow users to only receive a notification that a new build update is available for download as well as the option to receive important product related news messages.



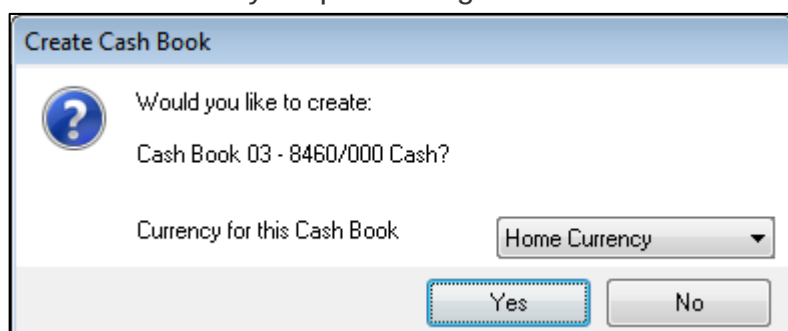
The screenshot shows the 'Sage Pastel Accounting Partner Version 17 - Settings' window with the 'Downloads' tab selected. The window title bar includes standard minimize, maximize, and close buttons. The 'Download Settings and Information' section contains the following fields and options:

- Application:**
 - Name: In Product Communication
 - Version: 2.0.4
 - Serial Number: V17PCOMM01
- Download Location:**
 - Path: C:\Pastel17\Custom\AutoUpdate\Updates
 - Checkbox: ☒ Let the Pastel Accounting Partner control the location
- Proxy:**
 - Checkbox: ☒ Use System Settings
 - Server: proxy.sagesouthafrica.co.za:8080
 - User: (empty field)
 - Password: (empty field)
 - Test: (button)
 - Text: The proxy server settings are obtained from your internet browser network settings.
- Status:**
 - Last checked on: Monday, 09 January 2017
 - Nothing Downloaded

At the bottom right, there are 'Save' and 'Close' buttons.

7. Easily create cash books from the Edit General Ledger Accounts screen.

Creating a cash book has never been easier. Simply create a new balance sheet general ledger account, assign it to the Bank Financial Category and click Save. Multi-currency customers can select an alternative currency for the cash book. Click on the Yes button and your cash book is created and ready for processing.

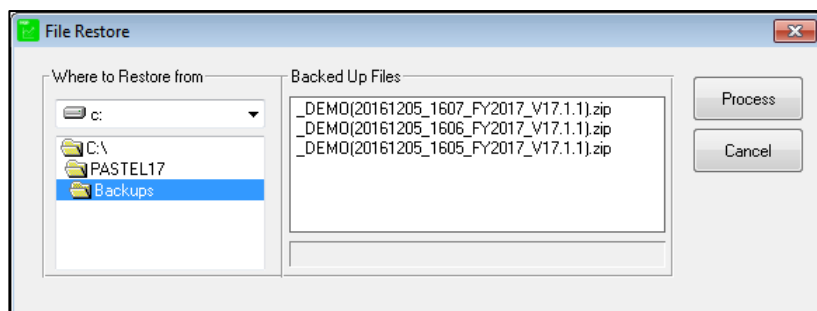


The 'Create Cash Book' dialog box contains the following elements:

- Question:** Would you like to create:
Cash Book 03 - 8460/000 Cash?
- Currency:** Currency for this Cash Book: Home Currency (dropdown menu)
- Buttons:** Yes (highlighted with a red dashed border) and No

8. Date and Timestamp on the backup

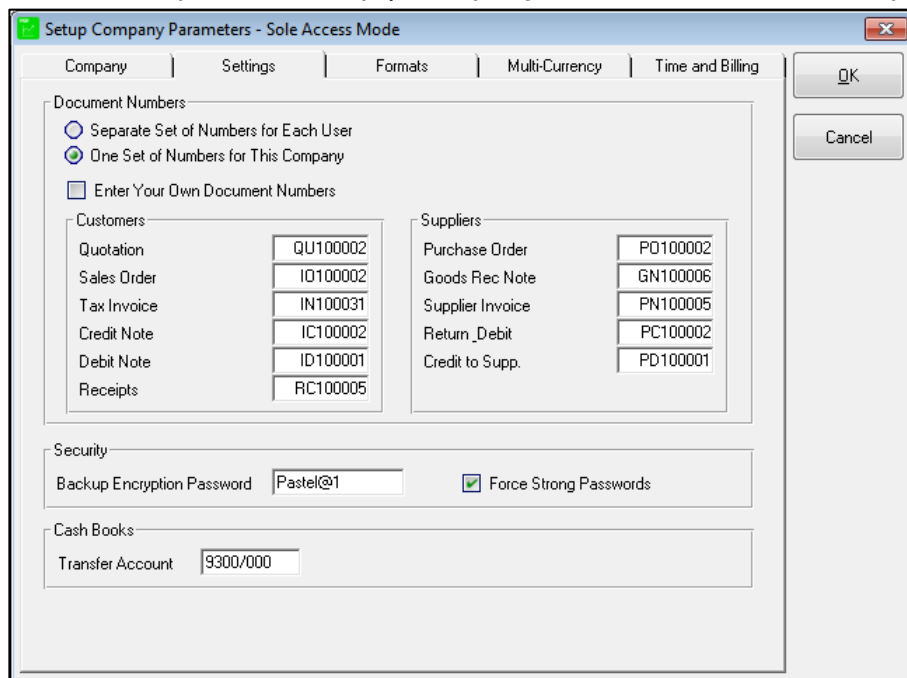
The days of overwriting a backup are gone. All backups will have a date and time stamp in the backup name. We have also improved the restore screen to allow you to choose the backup to restore:



9. Password protect your backups

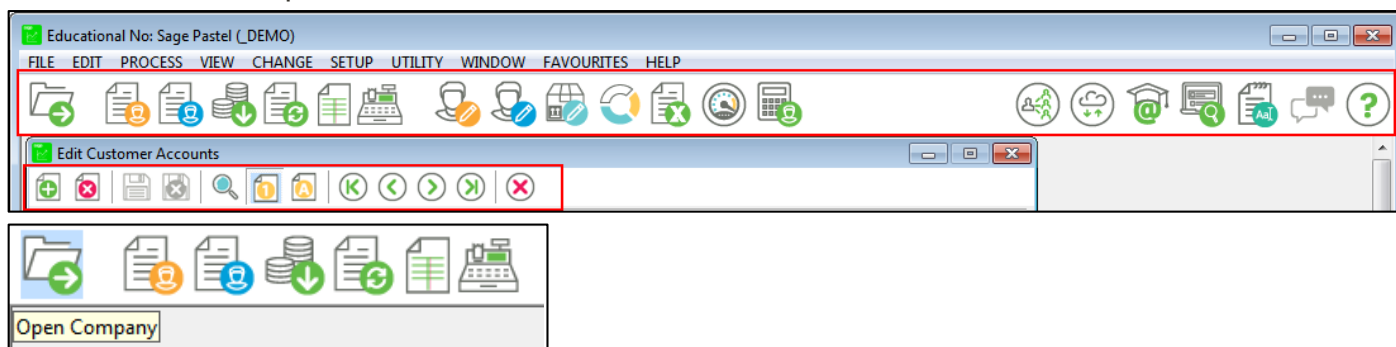
Backups are a very sensitive part of your business. You can add an encrypted password for your backup. To restore a backup, the user will have to supply the password to decrypt the backup file and allow the restore process to take place.

This is set up under Setup | Company Parameters on the Company tab.



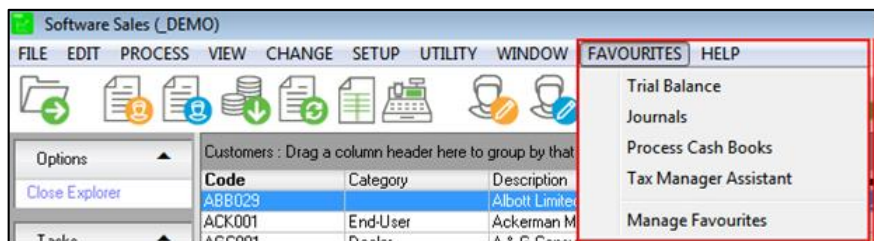
10. New Icons

Out with the old and in with the new. Our icons have undergone a revamp and have been updated to a more modern style. Not sure which icon represents which function? Hover your mouse over the icon for a description.



11. Favourites option

A Favourites option has been added to the menu bar where you can add your favourite or most used options in Pastel for easy access. The order of options in the menu can be customised for ease of access.



12. Forms Assistant

Create professional looking documents and statements without having to open the Forms Designer. Use the Forms Assistant to enhance the look and feel of your printed or e-mailed documents and statements. All this in a few easy steps:

- Choose a colour template
- Insert your company logo
- Finalise your selection

Documents

- ☒ Emailed and PDF Documents
- ☐ Printed and On-screen Documents

Statements

- ☐ Emailed and PDF Statements
- ☐ Printed and On-screen Statements

[illegible]

Insert a Logo

[illegible]

Current Form Layout

New Form Layout

13. User Access Report

The User Access report displays the different menu access, processing options and Sage Intelligence access that has been allocated to each user. The letter Y next to a field indicates the user has access.

User Access Report	
Group : Supervisor	User : User 0
Menu Access	
FILE	
Open	Y
New	Y
Delete	Y
Consolidate	Y
Export / Import	Y
Data Integrity	Y
Backup	Y
Restore	Y
Pastel IronTree Online Backups	Y
Register Pastel IronTree	Y
Select Data to Backup	Y
Backup Now	Y
Send and Receive Accountant Data	Y

14. Live Chat (South African customers only)

You can click on the Live Chat icon or access Live Chat from the Help menu to contact our support or client services team for assistance. The Live Chat to support is only available for customers who have a Business Care License or are on the Advantage package. All other Live Chat links will be directed to the sales team.

Customers : Drag a column header here to group by that column

Code	Category	Description	Balance R	Balance R Last Year	Sales R	Sales R Last Year	Currency	Balance (Currency)	Balance (Currency) E
ABB029		Albott Limited	17,028.46	3,470.00	16,876.72	3,470.00	R	17,028.46	3,470.00
ACK001	End-User	Ackerman Mr R	-451.00	0.00	350.00	0.00	R	-451.00	0.00
AGC001	Dealer	A & G Consultants	0.00	0.00	0.00	0.00	\$	0.00	0.00
ALL001	Distributor	Alliance	2,550.00	2,550.00	0.00	5,100.00	FRF	2,000.00	2,000.00
AST002	Dealer	Astcom Computer Tr.	0.00	0.00	0.00	0.00	£	0.00	0.00
BEC001	Dealer	Becker & Associates	0.00	0.00	0.00	0.00	R	0.00	0.00
BON001	End-User	Bond Mr James	0.00	0.00	0.00	0.00	R	0.00	0.00
BOU001	End-User	Boulding Mr D	0.00	0.00	0.00	0.00	R	0.00	0.00
CAB001	Dealer	Cable Ties Limited	0.00	0.00	0.00	0.00	R	0.00	0.00
CASH	End-User	CASH SALES ACCO	0.00	0.00	3,000.00	0.00	R	0.00	0.00
CIT001	Dealer	Citi Computer Specia	0.00	0.00	0.00	0.00	£	0.00	0.00
COM001	Dealer	Compucable	0.00	0.00	0.00	0.00	£	0.00	0.00
COM002	Distributor	Compure Software	0.00	0.00	0.00	0.00	R	0.00	0.00
COM003	Distributor	Computer Horizons	0.00	0.00	0.00	0.00	FRF	0.00	0.00
COM004	Dealer	Computer Resale an	0.00	0.00	0.00	0.00	R	0.00	0.00
COM005	End-User	Computer Training In	0.00	0.00	0.00	0.00	R	0.00	0.00
SMI001	End-User	Smith Mr John	0.00	0.00	0.00	0.00	R	0.00	0.00
SOF001	Dealer	Software Expert	0.00	0.00	0.00	0.00	R	0.00	0.00
SOF002	Dealer	Software Sellers	0.00	0.00	0.00	0.00	R	0.00	0.00

When you press F1 to open the help file, the system will check for an internet connection. If you have an internet connection and you have a Business Care License or are on the Advantage package, you will be directed to the online help files. These files are updated on a regular basis and links to our social media pages are available.

16. View Open Batches

When viewing open batches, you always select the open batch under the user and would then click on the Jump To button to open the specific document. You can now double click on the open batch item under the user column and you will be taken directly to the document.

Open Batches

	All Users	User 0									
Quotation	✓										
Sales Order	✓										
Tax Invoice		✓									
01 CB 1 Payments		✓									
02 CB 1 Receipts		✓									
Not Used											
Not Used											
Not Used											

Double-click or press Enter on the check mark to jump to that batch. Note you cannot jump to POS batches.

Jump To Print Close

17. Sage Pastel Intelligence Reporting – Report Utility

The Report Utility will automatically detect which Sage accounting or business management solution you are running and show all the available free reports for your solution. You can then select the required reports to be automatically imported into a “New Reports” folder in the Sage Intelligence Report Manager for immediate use. Once you have installed the Report Utility, a shortcut will appear on your desktop, allowing you instant access to our regularly updated library of free, additional reports.

Sage Pastel Intelligence Reporting



Free reports suitable to your business needs



Report Utility

The Report Utility allows you to select the reports you would like and automatically imports these reports into a “New Reports” folder in your Sage Intelligence Report Manager module.

[Download](#) >

Can't find the report you are looking for?
We'd love to hear your report ideas.
[Click here to submit your idea](#)

Pastel Partner V14 Bill Of Materials	Open	+
Pastel Partner V14 Cash Management	Open	+
Pastel Partner V14 Financial Reports	Open	+
Pastel Partner V14 Inventory Reports	Open	+
Pastel Partner V14 Power View Reports	Open	+
Pastel Partner V14 Purchases Report	Open	+
Pastel Partner V14 Sales Reports	Open	+
Pastel Partner V17+ Bill Of Materials	Open	+
Pastel Partner V17+ Cash Management	Open	+
Pastel Partner V17+ Financial Reports	Open	+
Pastel Partner V17+ Inventory Reports	Open	+
Pastel Partner V17+ Power View Reports	Open	+
Pastel Partner V17+ Purchases Report	Open	+
Pastel Partner V17+ Sales Reports	Open	+

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