

sage Pastel Accounting

what's
NEW?

VERSION 17

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Icons



Video



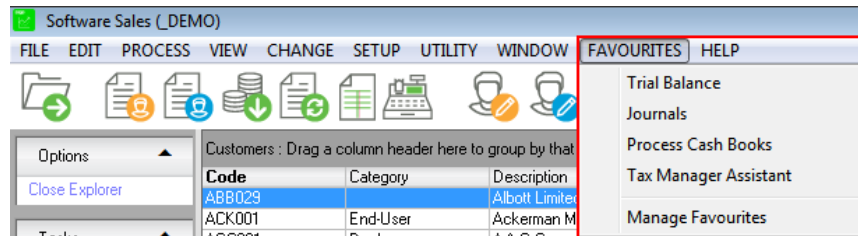
Cheat Sheet

New Features

The following new features are available in Sage Pastel Partner Version 17:

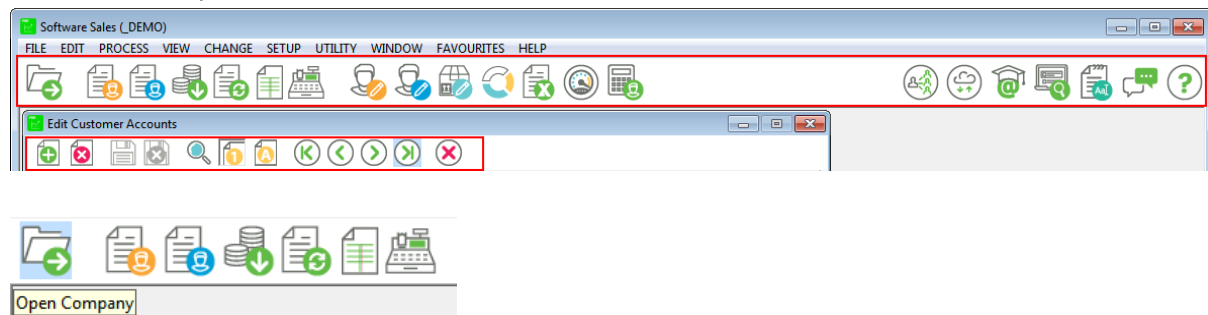
Favourites option

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.



New Icons

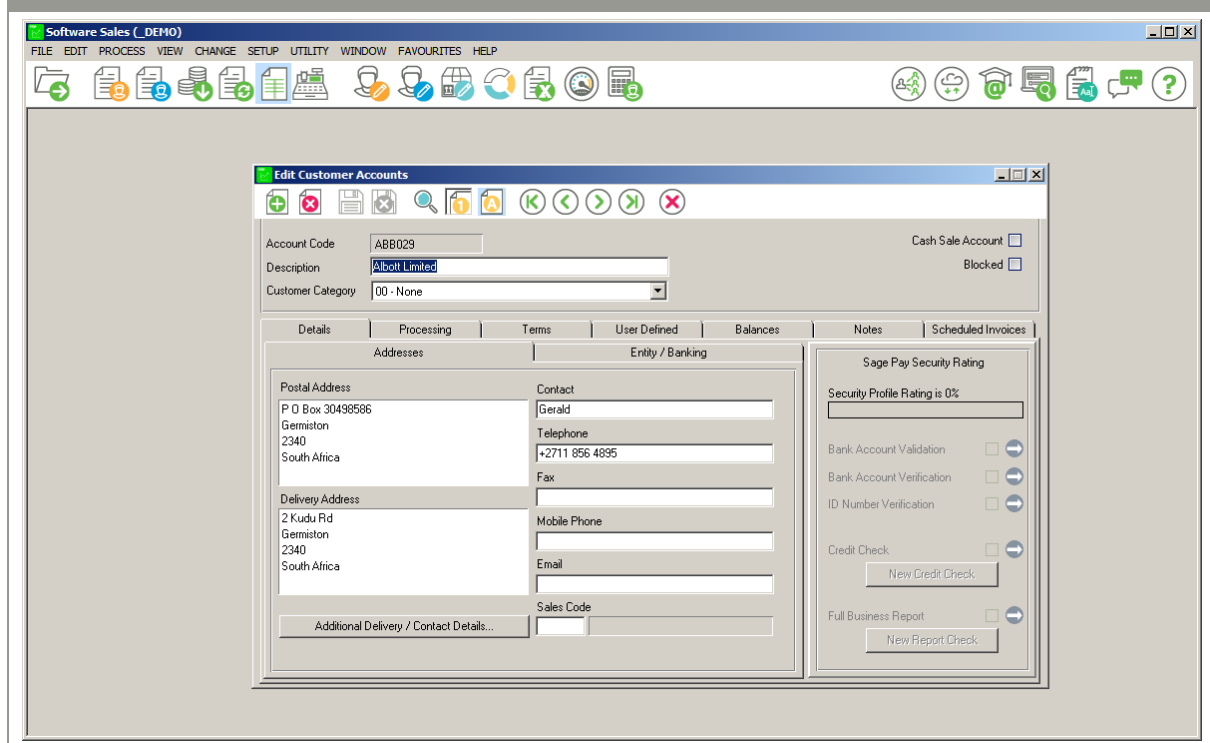
Out with the old and in with the new. Our icons have undergone a revamp and have been updated to a more modern style. Not sure which icon represents which function? Hover your mouse over the icon for a description.



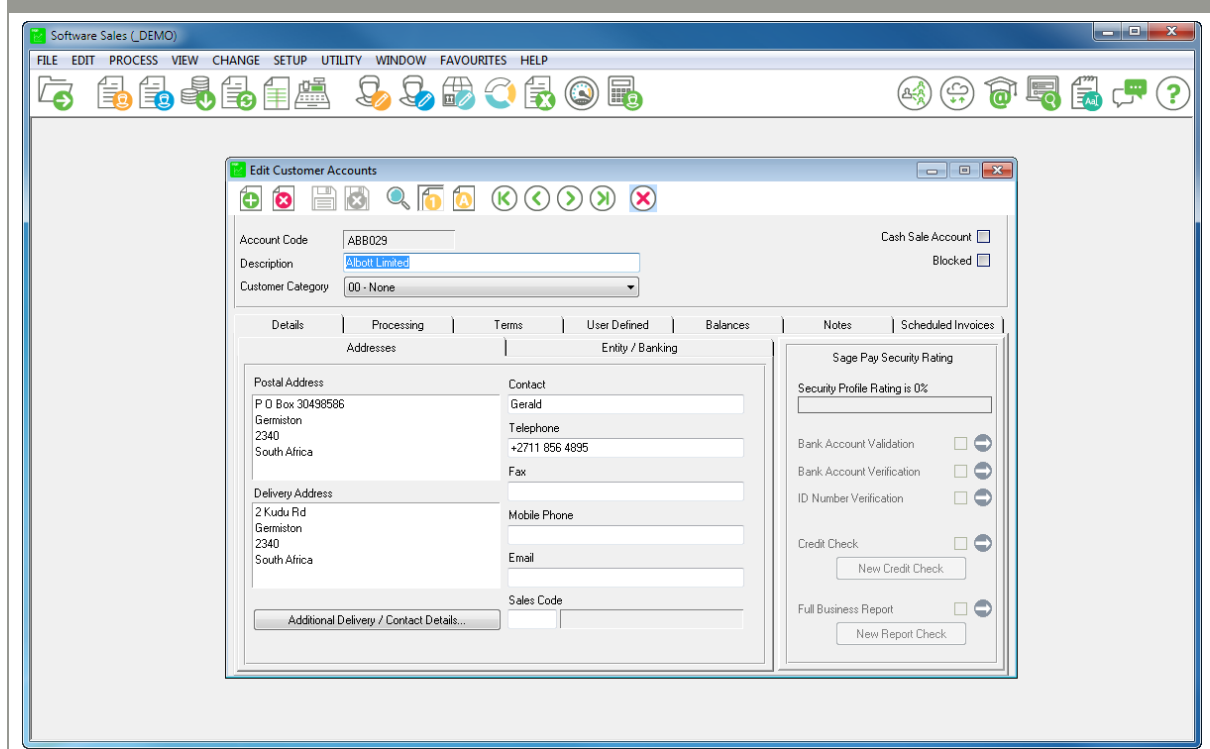
Windows theme integration

The user interface inherits elements such as buttons and colours from the Windows theme.

Windows Classic theme



Windows Aero theme



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

Select Documents or Statements to be enhanced

Documents

☒ Emailed and PDF Documents

☐ Printed and On-screen Documents

Statements

☐ Emailed and PDF Statements

☐ Printed and On-screen Statements

Select Colour style template

New Form Layout

ProgressMagenta

FormalBlue

FormalGreen

FormalGrey

FormalMagenta

FormalOrange

ProgressBlue

ProgressGreen

ProgressGrey

ProgressMagenta

ProgressOrange

Traditional

Insert a Logo

New Form Layout

Compare the old form to the new form

Current Form Layout

New Form Layout

Forms designer enhancements

Forms Designer, a more complex method of customising your documents, has the following new enhancements:

Border Colour and Fill Colour on Boxes

Customise your documents by changing the border colours and the colours of the boxes on the documents.

Rounded Corners on Boxes

You can change the boxes from square corners to rounded corners to enhance the look of your documents.

Snap to Grid

Snap your lines and boxes to the grid to ensure that all items are correctly aligned.

Convert all Text and Fields to Individual Font

Change the header and footer fonts on individual forms. This selection will then ignore the font settings selected in the Pastel Font Setup from the menu bar.

Convert to Greyscale

Convert your document to greyscale to ensure that the document is not printed in colour on a colour printer.

Colour Replacement Tool

Select a colour and replace the selected colour with a new colour throughout the document.

Select all Same Colour

This option selects all items in the form that are the same colour and you can reformat these selected items.

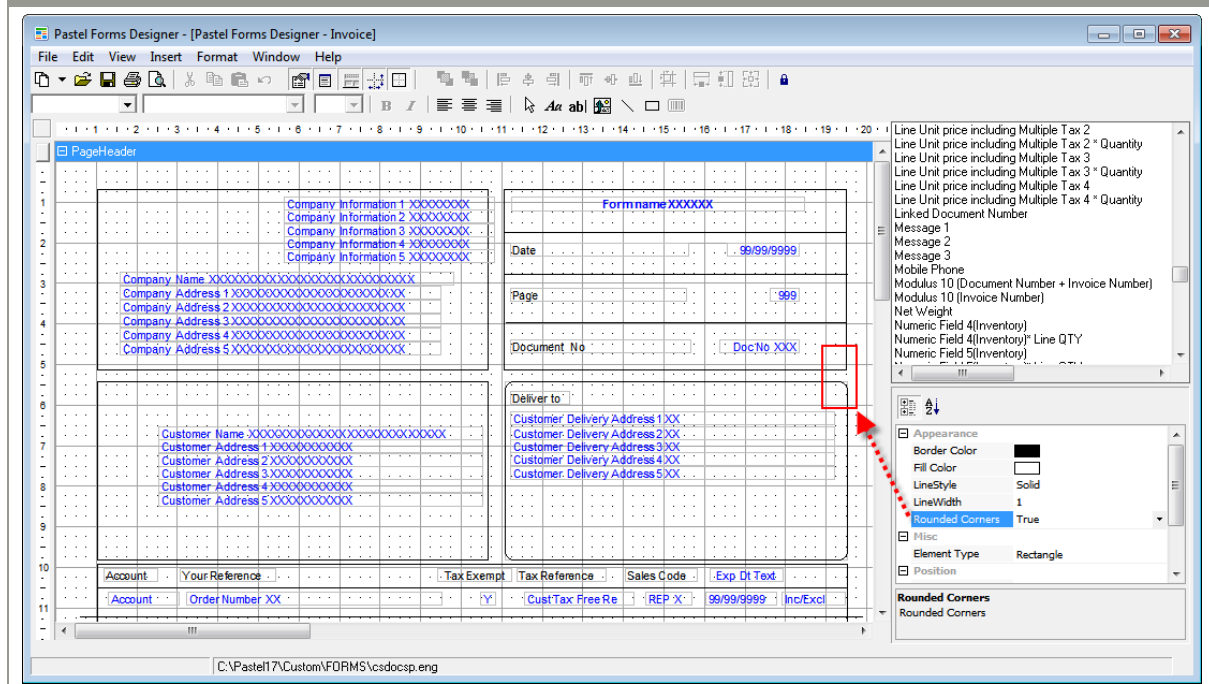
Image file automatically stored in company folder

Images are saved in the company folder.

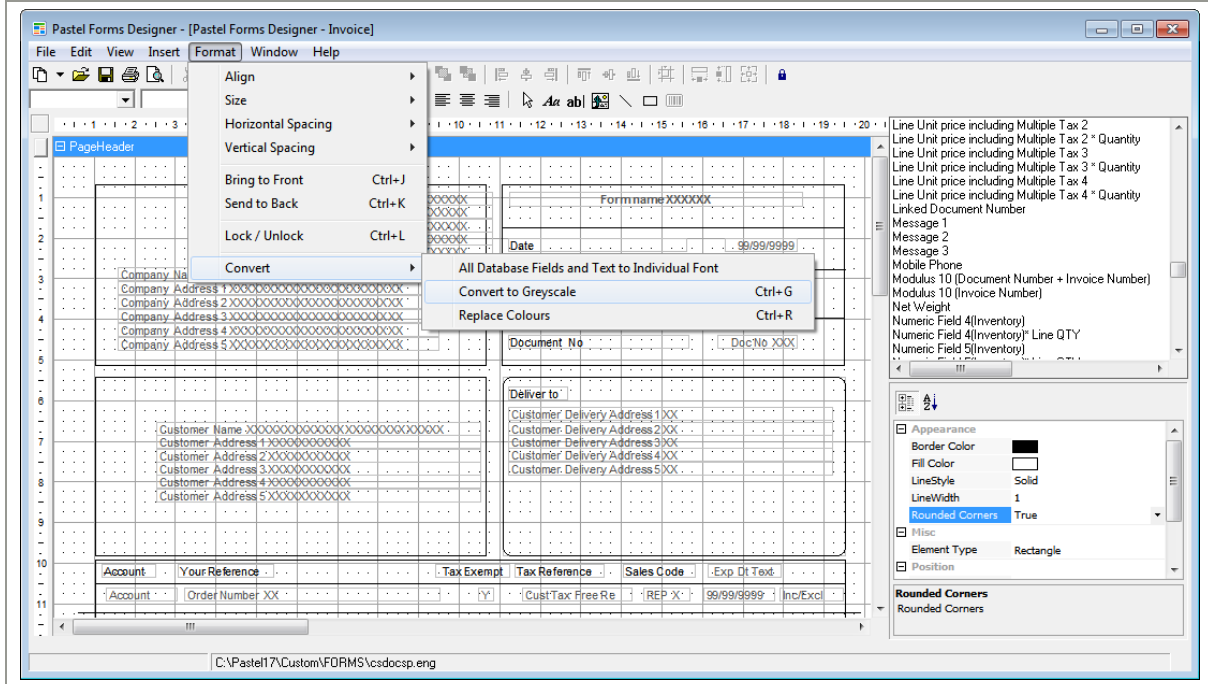
Images are sized according to available space and no longer change their aspect ratio

Images automatically resize when added to a document.

Rounded Corners



Convert to Greyscale



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

User Notifications for supervisor

In the past, the supervisor could not turn off specific notifications when processing. Now notifications can be turned off for all users including the supervisor. You will find this option under Setup...Users / Passwords...User Access Report.

User Notifications for User 0

Description	Allowed
Customers	☐
Enable Customer Reference Notification	☐
Enable Foreign Exchange Warning	☐
Suppliers	☐
Enable Foreign Exchange Warning	☒



Year End Backup

If a customer runs a year end without creating a new company, then once they reach the end of the year end assistant, the backup screen will open for the user to back up. If the user clicks on the Cancel or Close buttons or presses the Esc key, a message will display indicating that Pastel strongly advises you to make a backup before running the Year End assistant. This event will be logged on the System Changes Audit Trail under the "Backup" category.

Software Sales (.DEMO)

FILE EDIT PROCESS VIEW CHANGE SETUP UTILITY WINDOW FAVOURITES HELP

File Backup

Verify Method

☒ No Checking
☐ Ensure Files Readable

Where to Backup to

c:
C:\
PASTEL17
_Demo

Process

Cancel

File Backup

Pastel strongly advises that you create a backup before running the Year End. If you have already created a backup, click No to proceed.

This will be written to the System Changes Audit Trail under the Parameter Category Backup.

Do you want to create a backup now?

Yes

No

Software Sales			06/09/16 14:06 Page: 1
System Changes Audit Trail			Prepared by: Sage
Action Date	Time	User	Description
06/09/16	13:59	User 0	User chose not to create a backup during Year End on computer: PASJHBNB
----- End of Report -----			



In Product Communication

From time to time when there is important product information to share, a page will pop up when Pastel is opened. The page will display this important product information. Your computer will need to be connected to the internet to get the important information.

sage Pastel Accounting

What to look forward to in **VERSION 17**



Brand new look and feel

Updated icons and improved user experience.



In-product live chat (SA only)

Need help from one of our savvy support consultants?
We've got you covered!



Forms Assistant

Create professional looking documents and
statements in a few easy clicks.



Sage Intelligence Report Utility

Enjoy a growing library of free additional reports
via the Sage Intelligence (BIC) Report Utility.



Favourites option

Add your favourite or most used options for easy
access to a customisable menu tab



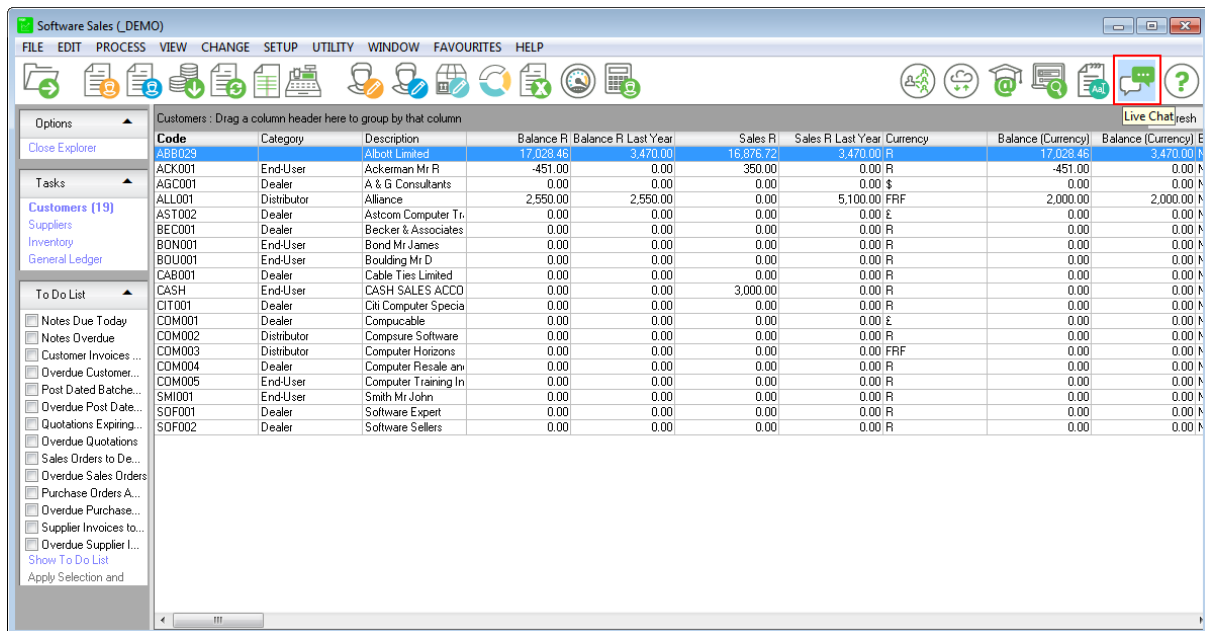
Purchase training online

Want to get the most out of your accounting software?
Browse and purchase e-learning courses from within
your Pastel Accounting package.

Click [HERE](#) to read more >

Live Chat (South African customers only)

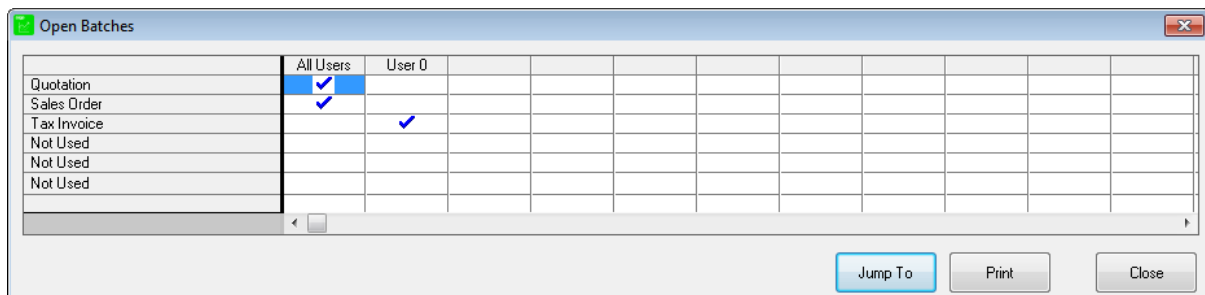
You can click on the Live Chat icon or access Live Chat from the Help menu to contact our support or client services team for assistance. The Live Chat to support is only available for customers who have a Business Care License or are on the Advantage package. All other Live Chat links will be directed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



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.

This does not apply to Point of Sale.



Online Help

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.



Sage Pastel Accounting
Online Help Centre



Home Software Packages Blog Contact Us [Live Chat](#)



Did you know that we have a **community of over 3 500 resellers** who provide backing and support for our software?

Sage Pastel Partner Advantage

Sage Pastel Partner Advantage is more than traditional small business accounting software. It is an integrated small business accounting software solution that helps small and medium sized companies manage their business and gain control. Work smarter using automated business processes, always receive the latest software version at no additional cost and have access to unlimited support when you need it with our business accounting software. Built-in tools such as intelligent reporting, automated bank feeds and mobility give you real-time accurate information, freeing up time to focus on running your business with confidence.

Getting Started	Working in Pastel
Working with Companies	Company Setup and Processing
Mobility	General Ledger
Customers	Suppliers
Inventory	Point of Sale
Multi-Store	Bill of Materials
Serial Number Tracking	Multi-Currency

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Latest News

How HH Accounting services have streamlined cash flow with Sage My Customer Zone
Not having a healthy cash flow is what keeps many South African small and medium businesses owners up at night. For Port Elizabeth based ...
[READ MORE](#)

Business intelligence software is the smart choice for your company
When it comes to managing a business there's no such thing as too much information; knowledge is definitely power. That's why business ...



Online E-learning purchases

Browse and purchase an e-learning course within Pastel Accounting.

Software Sales (DEMO)

FILE EDIT PROCESS VIEW CHANGE SETUP UTILITY WINDOW FAVOURITES HELP

Options

Close Explorer

Tasks

Customers (19)

Suppliers

Inventory

General Ledger

To Do List

Notes Due Today

Notes Overdue

Customer Invoices ...

Overdue Customer...

Post Dated Batche...

Overdue Post Date...

Quotations Expiring...

Overdue Quotations

Sales Orders to De...

Overdue Sales Orders

Purchase Orders A...

Overdue Purchase...

Supplier Invoices to...

Overdue Supplier I...

Show To Do List

Apply Selection and

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	E-Learning	Refresh
ABB023	End-User	Albott Limited	17,028.46	3,470.00	16,876.72	3,470.00	R		
ACK001	End-User	Ackerman Mr R	-451.00	0.00	350.00	0.00	R		
AGC001	Dealer	A & G Consultants	0.00	0.00	0.00	0.00	\$		
ALL001	Distributor	Alliance	2,550.00	2,550.00	0.00	5,100.00	FRF		
AST002	Dealer	Astcom Computer Tr.	0.00	0.00	0.00	0.00	£		
BEC001	Dealer	Becker & Associates	0.00	0.00	0.00	0.00	R		
BON001	End-User	Bond Mr James	0.00	0.00	0.00	0.00	R		
BDU001	End-User	Boulding Mr D	0.00	0.00	0.00	0.00	R		
CAB001	Dealer	Cable Ties Limited	0.00	0.00	0.00	0.00	R		
CASH	End-User	CASH SALES ACCO	0.00	0.00	3,000.00	0.00	R		
CIT001	Dealer	Citi Computer Specia	0.00	0.00	0.00	0.00	R		
COM001	Dealer	Compucable	0.00	0.00	0.00	0.00	£		
COM002	Distributor	Compure Software	0.00	0.00	0.00	0.00	R		
COM003	Distributor	Computer Horizons	0.00	0.00	0.00	0.00	FRF		
COM004	Dealer	Computer Resale an	0.00	0.00	0.00	0.00	R		
COM005	End-User	Computer Training In	0.00	0.00	0.00	0.00	R		
SMI001	End-User	Smith Mr John	0.00	0.00	0.00	0.00	R		
SOF001	Dealer	Software Expert	0.00	0.00	0.00	0.00	R		
SOF002	Dealer	Software Sellers	0.00	0.00	0.00	0.00	R		



Add-on Modules

Point of Sale

Enhancements

1. Pastel Point of Sale now runs on Microsoft SQL. This is mainly to cater for users that have large datasets.
2. New functionality allows POS payment types to be split between different General Ledger Control Accounts or Cashbooks. This allows for reporting on different payment types and makes it simple to trace or reconcile variances.
3. Entity tab has been added to allow users to enter additional Masterfile fields when creating new Customers.
4. On Edit of Documents, it was defaulting to On Hold. If there are no documents on hold, it will now default to COD.
5. There is new Search functionality for customer accounts. On the Zoom, activate the find option and the search fields are:
 - Code
 - Description
 - ID
 - Name
 - Surname
 - Passport
 - Delivery Address 1
 - Telephone No
 - Mobile No
6. If an invalid inventory code is entered, a message is displayed and a user cannot continue.
7. Enable or disable strong password option.

SMS Messaging

1. Send SMS Messages to customers or enter your own customer number for SMS notifications. SMS messages can be sent for the following transactions:
 - On completion of a Quotation
 - Sales Order
 - Tax Invoice
 - Credit Note
 - After a POS user or supervisor completes a Cash Up
 - For Money In or Money Out transactions
2. Customers can be instantly informed when a transaction has been posted against their accounts.
3. Managers or owners can be notified of the daily Cash Sales (Cash up) amount or when money has been taken from the till.

Debtors Manager

1. Back up and restore Debtors Manager files. (On the server only).
2. Refresh speed has been improved.
3. Password and permissions has been added to Debtors Manager.
4. A User Management panel is included to set up User Permissions (e.g. ability to delete notes).
5. The Dashboard has been updated.
6. The following enhancements have been made to payment reminders and emailing:
 - a. PDF Invoices are now attached to Payment Reminders.
 - b. PTP Date is included in the payment reminder.
 - c. User Customisable Subject line.
 - d. Use predefined fields to auto-populate the following:
 - Acc No.
 - Customer Name.
 - Customer Balance.
 - e. There is a mass email option to send emails to a customer base, using templates and optional predefined fields.
7. New Report:
 - a. Days overdue based on terms.
8. Age Analysis grid:
 - a. Quick PTP visibility on the Age Analysis.
 - b. Email | SMS visibility on the Age Analysis.
 - c. Age Analysis has space separators for large numbers e.g. instead of 100000,91, now displays 100 000,91.

Cheat Sheet

[Favourites](#)

[Forms Assistant](#)

[Back up before Year End](#)

[New Icons](#)



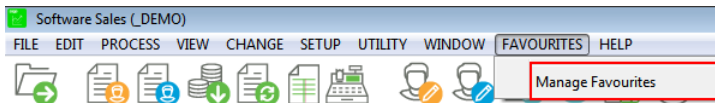
Cheat Sheet - Favourites

Features

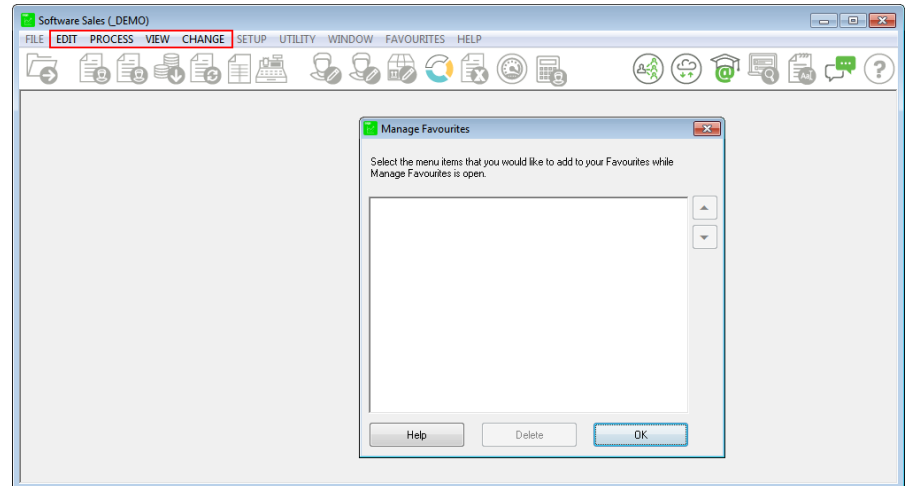
- Add your favourite or most used Pastel options for easy access.
- Customise the order of the options for quick access.
- If you add a new favourite, you can edit the description. This is useful when you add two options with the same description such as Edit Categories. You can then specify if the category is for Inventory, Customers or Suppliers.
- The description field of a favourite option can handle up to 50 characters.
- You can set up a maximum of 15 favourites per user.
- Favourites are per user and are stored in the Accgnprm.dat file.
- The "&" is a flag so Pastel knows that the character to the right of the "&" can be used as a shortcut key to reach the particular favourite. Press Alt + A to invoke Favourites, then Alt + T for the Trial Balance. In the Favourites menu, the letter to the shortcut is underlined.
- Special characters are allowed in the description of the favourites.

Adding options to Favourites

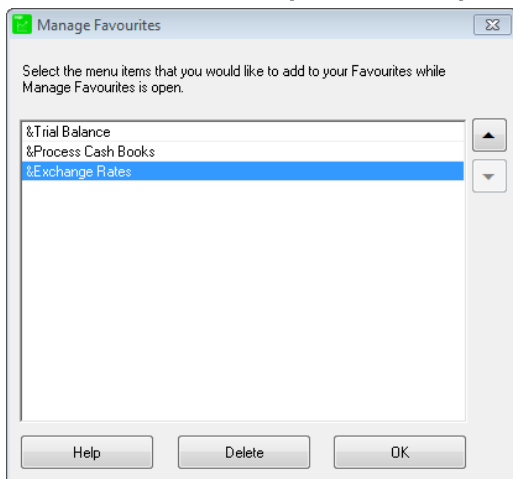
Select Favourites...Manage Favourites



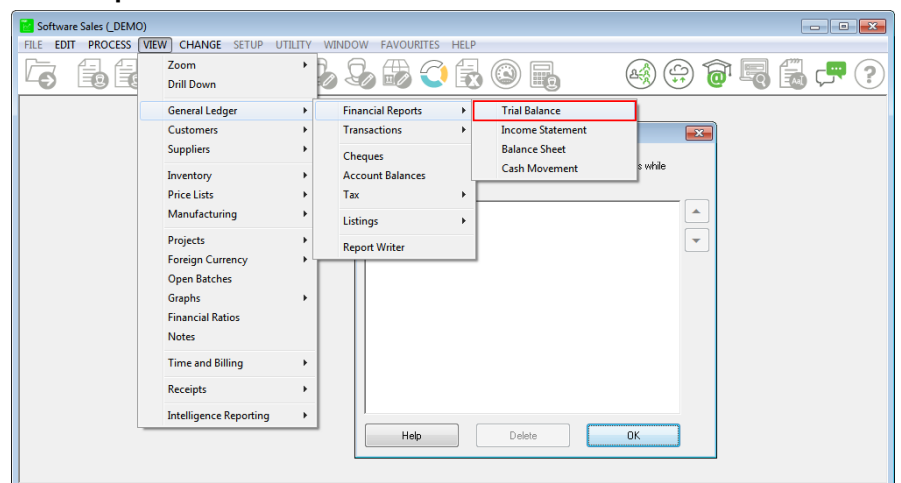
Only options from the enabled menus can be added



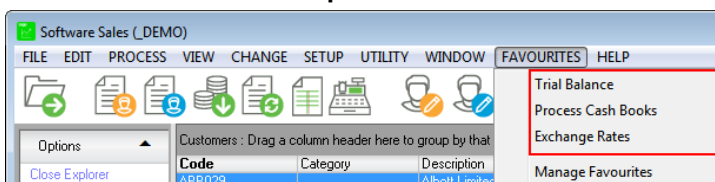
You can move options up or down on the list and edit the description of the options



Select options to add



The Favourites menu is updated



[Return to topic](#)



Cheat Sheet - Forms Assistant

Features

- Create professional looking Documents and Statements.
- Quickly and easily without having to open the forms designer.
- Only applicable to plain single sheet style for printing, not pre-printed stationary.
- Forms Assistant uses the forms with .zzz extension in the Custom folder. These specific forms should not be deleted if using Forms Assistant.
- For advanced customisation, open the *.zzz file in forms designer and then rename the file back to its original name in the Forms folder.

Insert an image

If the image size exceeds the picture box size, a message displays indicating the image will be resized. The aspect ratio is locked, ensuring a consistent image quality.

Images are automatically saved in the company folder ensuring a backup is available when upgrading.

The image path

The path of the image is stored on the form and when printing the system looks for the image in the company folder. If the image is not located, the original path the image was inserted from will be used.

If you encounter resize errors, it is possible that the wiaaut.dll file is not present on the server. Click on the link below to learn more about activating the file.

Consult with your system administrator.

[http://computerstepbystep.com/windows_image_acquisition_\(wia\)_service.html](http://computerstepbystep.com/windows_image_acquisition_(wia)_service.html)

Backups

If you have created a new form and would like to restore the previous form, you can click on the Restore button and the old form will be restored. This old form is backed up to the company directory as *formname.BAK*.

Customising your forms with Forms Assistant

Select Document to customise

Emailed or Printed Forms

Select which form types you would like to change the layouts for. This assistant may be run multiple times to change multiple forms.

Documents

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

Statements

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

Insert a logo

Insert Picture

If you would like to insert your company logo, click on the browse button to select the image. Click on the form to preview it. Click Next to continue.

Browse

New Form Layout

The preview shows a form layout with a pink background. At the top left, there is a large '39MM' logo. Below the logo, there are several sections for data entry, including a table with multiple columns and rows. The form is titled 'Form Name' at the top right.

Select colour template

Emailed and PDF Documents

Your current forms display in the Current Form Layout drop down. An enhanced layout can be selected from the New Form Layout drop down. Once applied, forms can be edited using the Forms Designer. Click on the form to preview it. Click Next to continue.

Current Form Layout

The current form layout is a standard form with a white background. It has a header section with 'CSDOCPDFSP.ENG' and a main body with a table. The form is titled 'Form Name' at the top right.

New Form Layout

The new form layout is a list of color templates. The list includes: FormalBlue, FormalGreen, FormalGrey, FormalMagenta, FormalOrange, ProgressBlue, ProgressGreen, ProgressGrey, ProgressMagenta, ProgressOrange, and Traditional. The 'ProgressMagenta' template is selected and highlighted in blue.

Original Customer/Supplier Document, PDF And Email, Plain Single Sheet

Preview the changes and click on the Process button to complete the action.

Confirm Operation

You are about to replace your current form layout with the new form layout. Your current customised form will be backed up in the company folder in case you want to restore it later. Click on the forms to preview.

Current Form Layout

The current form layout is a standard form with a white background. It has a header section with 'CSDOCPDFSP.ENG' and a main body with a table. The form is titled 'Form Name' at the top right.

New Form Layout

The new form layout is a form with a pink background. At the top left, there is a large '39MM' logo. Below the logo, there are several sections for data entry, including a table with multiple columns and rows. The form is titled 'Form Name' at the top right.

Click Process to finalise the new form, or Cancel to leave this assistant.

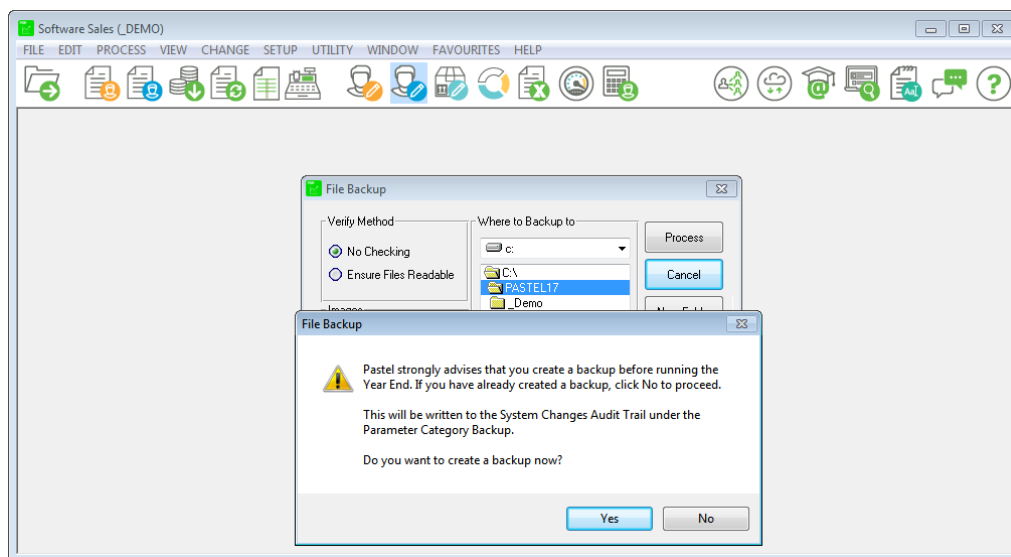
[Return to topic](#)



Cheat Sheet – Backing up before Year End

Features

If a customer runs a year end without creating a new company, once they reach the end of the year end assistant the backup screen will open for the user to make a backup. If the user clicks on the Cancel or Close buttons or presses the Esc key, a message will display indicating that Pastel strongly advises you to make a backup before running the Year End assistant. This event will be logged on the System Changes Audit Trail under the “Backup” category.



Software Sales

06/09/16 14:06 Page: 1

System Changes Audit Trail

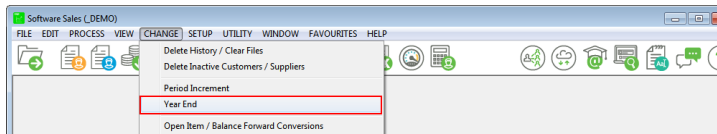
Prepared by: Sage

Action Date	Time	User	Description
06/09/16	13:59	User 0	User chose not to create a backup during Year End on computer: PASJHBNB

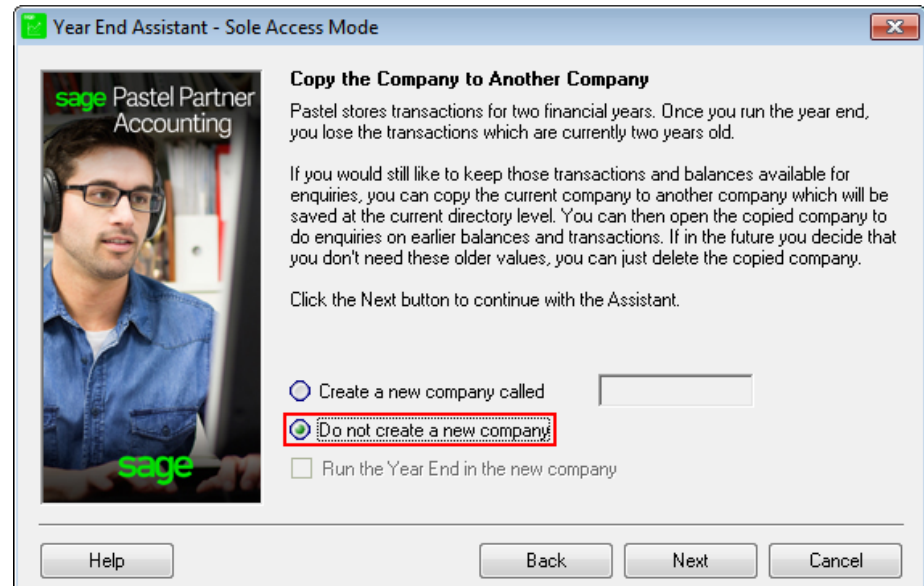
----- End of Report -----

Not backing up before running a Year End

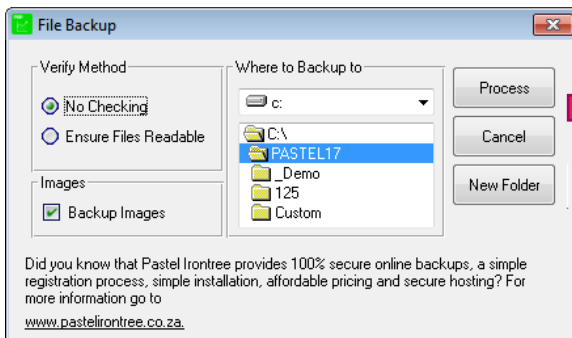
Select Change...Year End



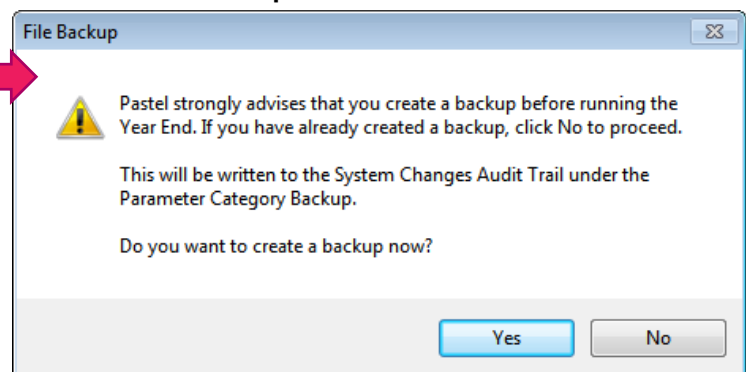
You select the option not to create a new company



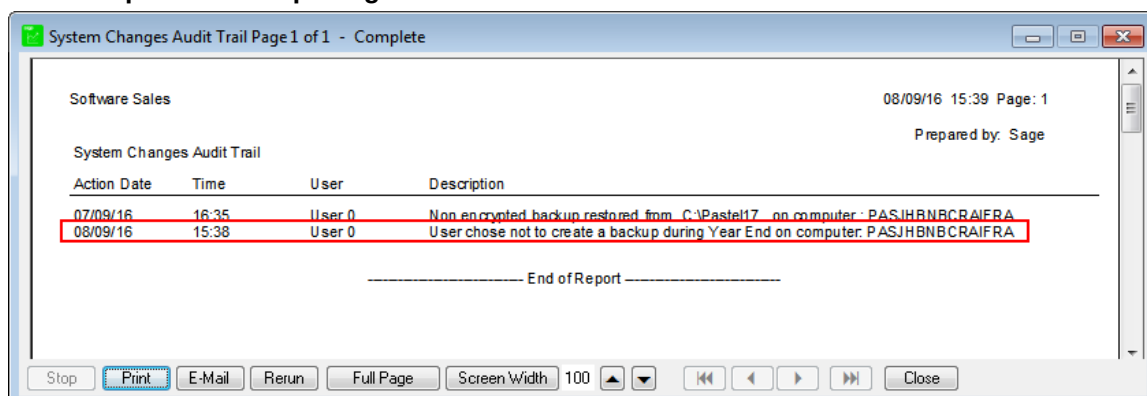
At the end of the process you receive the backup screen and select Cancel or you close the screen



You will receive the following message. You select No to not create the backup.



On the System Changes Audit Trail report there is an entry indicating the user chose not to back up before completing the Year End.



[Return to topic](#)



Cheat Sheet – New Icons

PASTEL MENU BAR ICONS					
Old	New		Old	New	
		Open a Company			Process Customer Documents
		Process Supplier Documents			Process Cashbooks
		Process Bank Reconciliation			Process Journals
		Process Point of Sale			Edit Customers
		Edit Suppliers			Edit Inventory
		Graphs / Financial Ratios			Intelligence Reporting
		Dashboard Reports			Pastel Debtors Manager
		Pastel Fax			Pastel Payroll
		Connected Apps			E-learning
		Pastel Explorer or Navigator			Note Facility
		Live Chat			Help Menu
ICONS REMOVED FROM THE MENU BAR					
		RSS Feeds			Sage Pastel Iron Tree online Backup
		Sage Pastel Online Store			Internet

[Return to topic](#)

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