

## EVOLUTION TRAINING

### Pastel Evolution End User Module 3: Pastel Evolution Product Consultant

This comprehensive training programme covers all the Pastel Evolution add-on modules.

#### Entrance Requirements

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

1. Computer Literacy at NQF Level 3.
2. Evolution Practitioner.
3. Evolution Installation Technician.

#### Target Learners

This course is designed for learners with an established Pastel Evolution background and want to specialise in Pastel Evolution's added benefits.

#### Training

This is a 5 day course.

#### Delivery Methods

Delivery methods include

- Facilitated Workshop

#### Benefits

This course will provide a broad product information base and create greater awareness and confidence when using Pastel Evolution. Learners will learn about the different features add-on features, as well as why they need to know this information and how it affects them in a practical way.

#### Course Outline

##### Fixed Assets

- This module calculates book and tax depreciation.
- It also lets you keep track of the assets in your system.
- You can link assets in a master and sub asset relationship, which is useful, for example when you make changes to computer workstations.
- You can integrate directly into the General Ledger Module or Pastel Partner.

##### Point of Sale

- This module controls cash and account sales in retail environment.
- You can control cash drawers, pole displays, and receipt printers.

### **Procurement**

- This module allows you to control purchase order processing.
- It is a two fold process which includes the processing of purchase orders and requisitions.
- The Procurement add-on module makes extensive use of the Contact Management Premium (Resolve Premium) add-on module to send requests, notifications, and authorisations between agents.
- This involves the setting up of workflows and incident types, and the use of incidents.

### **Annuity Billing**

- If you have repetitive periodic sales to customers, such as service calls, maintenance contracts, and so on, you would use this module to track these, inform an agent when they are due and create the invoices automatically.

### **Job Costing**

- This module lets you create jobs with its unique elements and costs attached to it.
- Each job can contain multiple transactions or processes from one or more customers, suppliers, inventory, general ledger and payroll sources.
- For example, you can bring customer's vehicle, appliances etc. into your workshop, use parts and labour to repair it and then invoice the customer for the job.

### **Linked Accounts**

- This module lets you link customers in a head office / branch hierarchy.
- You sell branches and the system invoices the head office.
- Payments take place at the head office as well.

### **Multi-Warehousing**

- This module lets you create separate warehouses.
- You allocate inventory items to the different warehouses.
- The system tracks quantities per warehouse per item.
- You can also have different selling prices in each warehouse.
- Goods in Transit warehouse processing.
- Variance Warehouse and Damage Warehouse.

### **Bill of Materials / Manufacturing**

- These modules allow you to manufacture and assemble items that you sell.
- You can manufacture as a process or on the fly as you invoice.
- You can create as many sub-levels or components as you require.

### **Pricing Matrix**

- This module lets you design unique discount matrices for suppliers and customers.
- Discount matrices can be grouped per item, supplier and/or customer.
- It also allows you to create powerful date driven volume discount contracts.

### **Serial Number Tracking**

- This module lets you track inventory items individually by their serial numbers.
- This function is very useful for tracking warranties.
- The system keeps a full history of each serial number item's movement into and out of the company.

### **Bank Manager**

- This module lets you import your bank statement into the system.
- Eases the bank reconciliation process.
- Create recurring entries like fixed debit orders etc.

### **Lot Tracking**

- This module allows you to track your items in lots and assign expiry dates to them.

### **Sales Force Automation**

- Assists in identifying prospective customers.
- Rates probabilities.
- Manages the sales cycle.
- The Procurement add-on module makes extensive use of the Contact Management Premium (Resolve Premium) add-on module to send requests, notifications, and authorisations between agents.

### **Resolve (Premium / Lite)**

- Also known as CRM or Contact Management.
- This module controls incidents on a timed basis.
- It establishes an escalation hierarchy.
- Can create invoices for contracts.
- Workflows.

### **Multi Currency**

- This module allows you to create different countries currencies.
- It is mainly used for doing business overseas.

## Assessments

The assessment is not part of the course and is not included in the course price. Assessments must be completed within four weeks of attending the course.

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