

Pastel Evolution Product Consultant (Module 4)

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

[Entrance Requirements]

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

1. Bookkeeping NQF Level 3 qualification or Standard 8/Grade 10 Bookkeeping
2. Computer Literacy at NQF Level 3 or Standard 8/Grade 10 Computer Literacy
3. Mathematical Literacy or Standard 8/Grade 10 Mathematics
4. Pastel Evolution Practitioner Course (Module 1)
5. Pastel Evolution Advanced Practitioner Course (Module 2)

If you are not yet competent in the required prerequisites, you must first complete the relevant courses before enrolling for this course. It is essential that the course prerequisites are met so as to avoid being asked to leave and the course fees being forfeited.

[Target Learners]

If you have an established Pastel Evolution background and would like to specialise in Pastel Evolution's add-on modules, this course is for you.

[Training]

This is a five day (30 hour) course.

[Delivery Methods]

The delivery methods include:

- Self study.
- Facilitated workshops.

[Assessments]

The assessment forms part of the course and has to be written within 6 months from the commencement date of your classroom training or self study course. To make it easier for you, all the Pastel assessments are now ONLINE. This means that you can write the assessment in your own time and in the comfort of your own home (as long as you have a PC with internet access).

How to register for your ONLINE assessment?

1. Visit the www.pastel.co.za or www.sagepastel.com website.
2. Select the Training Zone on the top right hand side of the website.
3. Using the Serial Number that you received with your course material, select the option Register Your Training Serial Number.
4. Register your Serial Number within 3 days of receiving your course material.
5. Follow the subsequent steps.

[Course Outline]

This course will explain the detailed set up, processing and reporting aspects of the Pastel Evolution add-on modules. An overview of each add-on module's course content is explained below:

Annuity Billing

The Annuity Billing content explains how to create recurring invoices for your customers. Recurring invoice templates are also discussed.

Bank Manager

The Bank Manager content covers how to download and import your electronic bank statement into the system. An explanation is given on how to create recurring entries and, how this add-on module eases the reconciliation process.

Bill of Materials and Manufacturing

The BOM and Manufacturing content explains how the two add-on modules work together to effectively assemble and manufacture items. The manufacturing process is explained. The process on how to create a bill containing different items is also explained.

Cash Manager

The Cash Manager content will show you how to use the Cash Manager add-on module to effectively manage your debtors age analysis.

Credit Control

The Credit Control content covers how to use the Credit Control add-on module to streamline your customer credit applications.

Contact Management

The Contact Management content focuses on how to manage your internal contact and communications by creating and using incidents, workflows, escalation hierarchies and time allocations to tasks. The benefits of this add-on module are discussed and demonstrated.

Fixed Assets

The Fixed Assets content details the set up, processing and reporting requirements available for your assets. Depreciation methods are explained and demonstrated. It further explains how you can create and link sub assets to master assets as well as keep track of your assets using the Asset Tracking feature.

Job Costing

The Job Costing content explains how to set up job defaults. Thereafter, explanations are given on how to create and process jobs, job cards as well as how to link the various item and labour elements to them.

Linked Accounts

The Linked Accounts content explains how this add-on module integrates with the Accounts Receivable module by linking customers in a head office / branch relationship. Processing abilities are also explained and demonstrated as to how transactions reflect in the head office / branch relationship setup.

Lot Tracking

The Lot Tracking content explains how this add-on module allows you to track your items in lots/batches. An explanation is also given on how to assign expiry dates to your lots.

Multi-Currency

The Multi-Currency content illustrates how to create and process different foreign currencies for customer, supplier and item transactions.

Multi-Warehousing

The Multi-Warehousing content outlines the fact that multiple warehouses can be created when using this add-on module. It is brought to your attention that for each warehouse, different items and item prices can be allocated. The Goods in Transit (GIT) feature is explained as well as how you can manage damaged items and item variances for reporting purposes.

Point of Sale

The POS content starts by introducing you to the elements of a retail environment and continues to explain how to process cash and account sales using this add-on module. Emphasis is put on the detailed reports and other management tools that are available for accurate cash-up and till reconciliation processes.

Pricing Matrix

The Pricing Matrix content explains how to create different pricing/discount matrices for your customers and suppliers as well as how to set up powerful date driven volume discount contracts.

Procurement

The Procurement content explains how to use this add-on module to enhance your purchase order and requisition processes in your business. It explains that this Procurement add-on module is dependent on the Contact Management add-on module, for authorisations and notifications between the agents.

Sales Force Automation

The Sales Force Automation content introduces you to the features and benefits of this powerful sales management tool. The setup and processing abilities are demonstrated, such as sales steps, prospective customers, probabilities and so on. It also explains how this module is dependent on the Contact Management and Procurement add-on modules.

Serial Number Tracking

The Serial Number Tracking content explains how to set up and create serial number items. It is further discussed how the system keeps a full history of each serial number item's movement into and/or out of the business. Powerful reports are introduced.

[Booking process for South Africa, Lesotho and Swaziland]

To book online please ensure that you have your ID number, Pastel serial number and customer/pin number ready. If you are not currently a Pastel user, all you need is your ID number.

Step 1

Visit www.pastel.co.za and select the **Book Training** button on the homepage. Select "**Search for Training Event**".

Step 2

You will be prompted to select an **event type** or course. Select the event you want to attend from the drop down menu.

Step 3

Select the **area** in which you would like to attend training, and then select the **Search** button. A list of possible dates and venues will display.

Step 4

Select the **area and date combination** that is most convenient for you to attend training. A brief overview of the course with confirmation of price, availability and the venue will then be shown prior to you actually booking. You may now elect to book or to go back and select another event or a different venue.

Step 5

If you are happy with your event, area and date, go to the **Book for event** box at the bottom of the page. Enter your ID number, Pastel serial number and customer/pin number.

Step 6

You are now required to enter your **personal details**, including your reasons for attending the course and any food requirements you may have. On completion of this section you must submit your provisional booking. A pro-forma invoice will be generated, giving you a unique TRA booking number.

Step 7

You have 2 days in which to **make payment** for this course and to send the proof of payment to Pastel. Fax numbers for our branches are as follows: Johannesburg – +27 11 304 3671; Cape Town – +27 21 522 7401; Durban – +27 31 537 7101. When sending through your proof of payment, please quote your **unique TRA booking number**.

Step 8

Once payment has been confirmed, you will receive your course confirmation and a map to the selected training event. Should you wish to confirm your booking later, please return to www.pastel.co.za, select the **Book Training** option and then select the **Confirm Booking/Event** button. By entering either your ID number OR unique TRA Number you will be able to verify the details of your booked event, the status of your payment, view your invoice and reprint your map.

[Booking process for Other Countries]

To book for your Sage Pastel training, email itraining@sagepastel.com.

