

PASTEL | EVOLUTION

Resolve



The powerful and intuitive business activity management system

PASTEL | EVOLUTION RESOLVE

Pastel Evolution Resolve is a powerful, intuitive business activity management system that provides you with an integrated view of all your business activities.

All too often, a manager's main concern is financial information. Evolution Resolve takes management software to the next level by providing absolute control over activity-based information.

Evolution Resolve's flexibility allows you to define processes as a "business activity". Traditionally, the popular term given to tracking customer related activities is CRM (Customer Relationship Management). Tracking supplier related activities is sometimes called "Supply Chain Management". These and other processes all fall under the ambit of Evolution Resolve.

Evolution Resolve's functionality extends far beyond merely reporting on supplier and customer related activities. Any issue that takes place in a business, and is important enough to be tracked, is recorded as an Incident in Evolution Resolve. This allows you to track a history of events as they occur, as far back as you wish.

There are two versions of Evolution Resolve:

- **Evolution Resolve Basic** contains *basic* Incident tracking.
- The full version, **Evolution Resolve Premium** contains more advanced features.



Developed within the Pastel Evolution Framework, all components and modules in the Pastel Evolution range are fully integrated and share a common interface providing a consistent user experience. Microsoft's SQL Server Database ensures data integrity and maintains all your data in one, central database. Evolution Resolve provides you with one access point to all information on operations within your business.

Evolution Resolve can be used in conjunction with the core Pastel Evolution Accounting system and Evolution Resolve Premium can be purchased as a stand-alone product.

KEY FEATURES OF PASTEL EVOLUTION RESOLVE

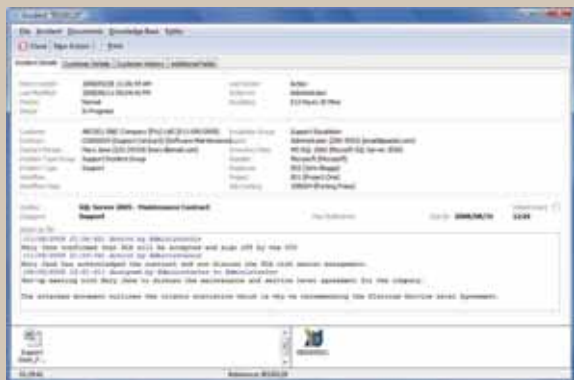
• Incident Tracking
• Incident Graphs
• Escalations
• Workflows
• Calendar
• Knowledge Base
• Reports
• Microsoft® Outlook Integration
• Sales Force Automation
• Procurement **
• Business Gateway **

** Add-on module to Evolution Resolve

INCIDENT TRACKING

In today's competitive environment, businesses need to take advantage of technology that can improve and streamline customer management, sales and marketing activities and support systems. Evolution Resolve does this by keeping track of all employee activities, including interaction with customers and/or suppliers, thereby keeping you on top of all activities within your business.

An Incident is any recorded action with customers, suppliers, fellow employees or any other activity related to your business.



INCIDENT GRAPHS

View Incidents graphically (bar charts) per user, per Incident type and per Incident status. Graphical representations of Incident information give a bird's eye view of your business activities - perfect for management. You can even drill-down by clicking on a particular area of the chart to see the underlying detail making up the chart.



ESCALATIONS

One of the most compelling reasons to use Evolution Resolve is its ability to ensure that Incidents are processed within acceptable time frames. Taking too long to respond to a customer is damaging to your company. Escalations allow you to design a flow of responsibility for each Incident Type. If an Incident is not resolved within a specified time, the system escalates it to a higher level such as a supervisor. From there, unless the supervisor takes action, the system escalates the Incident to a manager, and so on. Incidents can be archived for referring to at a later date.

WORKFLOWS

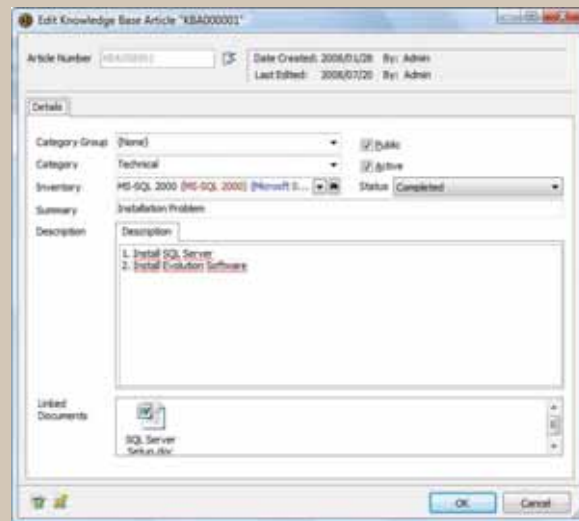
Workflows let you break a task down into sequential successive steps. This allows you to fully predefine complex processes and ensure maximum control of these processes, on a fully automated basis. The Workflow tool handles this process allowing each task to be assigned to an individual or a team of individuals for completion.

CALENDAR

The calendar organises your company time management and also allows you to integrate Incident priorities with employee's availability, as well as prioritising Incidents by date.

KNOWLEDGE BASE

The Knowledge Base enables employees to share information by creating Knowledge Base Articles. You obtain these Articles from support, sales or any other source within the business. In addition, you can link documents into Knowledge Base Articles. You link Articles to Incidents and attach them as additional information when corresponding via e-mail with customers or suppliers.

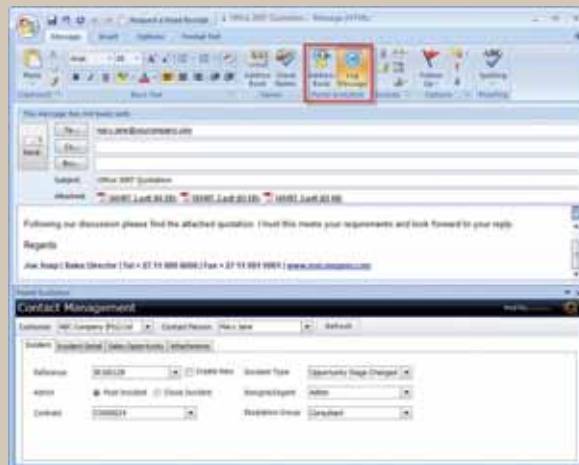


REPORTS

Reports in Evolution Resolve can be customised using the Report Writer functionality, enabling you to change layouts, add and remove fields, and perform additional calculations or sub-totals. You can even write your own SQL script for advanced reporting.

MICROSOFT® OUTLOOK INTEGRATION

Seamless integration with Microsoft Outlook 2007 allows you to capture any communication with your customers directly into the Contact Management. The ability to capture new or existing incidents and sales leads allows you to be more efficient and productive using an interface that you use to communicate with everyday. Customer and prospects contact details are available from Evolution and Outlook Calendar appointments make tracking appointments via the Contact Management module even easier to do.



SALES FORCE AUTOMATION

Evolution Sales Force Automation allows you to track sales opportunities for existing and prospective customers. Sales personnel can update the status of opportunities through customisable sales cycle workflow steps. They can continually update the estimated possibility of making a successful sale. Information can also be captured on competitors, so that you can recognise and track patterns regarding sales lost to competitors.

You can use this information to give sales personnel, and managers an overview of the current sales pipeline, and to produce sales forecast reports. These reports show actual values weighted by the probability of closing the sale. Integration with Evolution's existing functionality, such as Inventory and Accounts Receivable, simplifies initial setup and day-to-day operations, which are traditionally cumbersome with non-integrated solutions. For example, in the integrated Evolution Resolve environment, you only need to maintain a single customer and supplier database.

PROCUREMENT

The Procurement module from Evolution Accounting is seamlessly and tightly integrated into the Resolve CRM module allowing the user to track all actions and information regarding the authorisation processes.

Throughout the span of a requisition to the completion of a PO, all movements or comments are logged against incidents in Resolve Premium. Workflows are configurable to different levels and allow the relevant users to automatically acknowledge any authorisations required. Escalation rules are also configurable, ensuring that requisitions or purchase orders are actioned on time or escalated to the available persons who are able to grant authorisations. Any purchase orders due for authorisations automatically appears in the relevant users incidents to action. Resolve Incidents that are linked to purchase orders allow the purchase order to be viewed from the incident screen.

For further information please refer to the Pastel Evolution Accounting brochure.

ANNUAL RENEWAL FEE

Evolution Resolve is subject to an annual renewal fee. This business module provides a number of important benefits including: updates and upgrades, first line telephonic and e-mail support. The compulsory annual renewal is payable on the anniversary date of registration of the application.

BUSINESS GATEWAY MODULE

The Business Gateway extends Evolution Resolve onto the Internet and allows customers to log into the system via the web. Customers create, view, and update Incidents, and so on. Customers do not need to contact a call centre and wait in queues for an agent.

Internet queries are notorious for not being dealt with. However, the Business Gateway sends each query into Evolution Resolve individually, where it is tracked and escalated according to predefined rules.

The Business Gateway requires Microsoft® IIS and Windows 2000 Server or later.

OPTIMISE BUSINESS OPERATIONS

The utilisation of the MS-SQL database makes Evolution Resolve scalable, supporting an unlimited number of concurrent users. Evolution Resolve is unique in that it takes the concept of traditional Contact Management to another level. By weaving it into the Accounting environment and giving it the ability to incorporate other business operations, Evolution Resolve becomes a highly valuable tool.

Accounts and Administration

You can track account queries, faxes, and Incident history linked to both customers and suppliers. E-mail any document to any client and keep a history record. Attach important documents to customer and supplier records for a future correspondence. Block customers for non-payments and initiate a Workflow for debt collection.

Information Management

Use the Knowledge Base facility to store Frequently Asked Questions, documentation of complex issues, and procedures. This lets you share expertise across your business. You can search any entry to find a document or an article stored over time. Attach and e-mail Knowledge Base Articles within seconds to customers and suppliers. Track information requests by attaching Articles to Incidents and report on them for common queries.

Project Management

Control customer interaction using Evolution Resolve's powerful contact management reports. Use the Workflow feature to track each Project Stage and assign different teams or individuals to each stage. You can set Escalations for each stage of the project to maintain efficiency of the project cycle. Using the Incidents, you can consolidate all project documents and files required per stage per project. The Knowledge Base facility can store all documents and templates for quick reference within the project lifecycle. View all activities per stage, per project, and view Incident history by customer or supplier.

Contract Management

Create multiple contracts per customer and track each contract by its type. Maintain your customer relationships by creating user-defined fields that allow for additional information specific to your business needs. Contracts can have a clearly defined cost per contract. Block contracts for non-payment and charge accordingly per Incident.

Support or Call Centre Management

Maintain your relationships with customers and suppliers by tracking unlimited Incidents per customer/supplier and by managing multiple open issues.

Customer queries need to be resolved on time, every time. Use the Escalations feature to ensure efficiency in the Call Centre. Track Incidents per Service Level Agreement or other Support Contracts and report on them accordingly. Graphically view all Incidents and their status per Agent (user).

SYSTEM REQUIREMENTS

	SINGLE USER	WORKSTATION	SERVER
HARDWARE			
Minimum	Pentium IV	Pentium IV	Intel Core 2 Duo or equivalent
Recommended	Intel Core 2 Duo or equivalent	Intel Core 2 Duo or equivalent	Xeon Dual/Quad Core
OPERATING SYSTEM	Microsoft® Windows 2000 Pro, Windows XP Pro, Windows Vista ¹ , Server 2000, Server 2003, Server 2008		
DATABASE SERVER	Microsoft® SQL Server 2000 & 2005		
MEMORY			
Minimum	512MB	512MB/1GB	2GB or higher
Recommended	1GB or higher	1GB or higher	4GB or higher
SCREEN RESOLUTION			
Minimum	800 x 600	800 x 600	800 x 600
Recommended	1024 x 768	1024 x 768	1024 x 768

Kindly note, if you have 11 users or more on your network, we strongly recommend you speak to your Pastel Evolution Business Partner regarding the system requirements recommended for your specific environment.

OTHER SYSTEM REQUIREMENTS:

- DVD-Rom
- 256 Colour VGA or SVGA Video Graphics
- The on-line help requires Internet Explorer version 6 or higher, or a compatible browser
- Up-to-date network drivers, service packs and updates for your network and operating systems
- Windows Vista Home and Basic editions are not supported¹
- Windows Vista personal computers/notebooks need to ensure that the recommended RAM memory requirements and Video Graphics adapter are met¹

The above serves as a guideline. Hardware requirements may differ depending on the operating system and the version of SQL Server.



Softline Pastel: JHB (011) 304 3000 • CT (021) 680 9000 • DBN (031) 566 3670

www.pastel.co.za • info@pastel.co.za

© Softline (Pty) Ltd, 2008