what's NEW?

VERSION 17
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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.
**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

<table>
<thead>
<tr>
<th>Select Documents or Statements to be enhanced</th>
<th>Select Colour style template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documents</strong></td>
<td><strong>New Form Layout</strong></td>
</tr>
<tr>
<td>- Emailed and PDF Documents</td>
<td>- ProgressMagenta</td>
</tr>
<tr>
<td>- Printed and On-screen Documents</td>
<td>- FormalBlue</td>
</tr>
<tr>
<td><strong>Statements</strong></td>
<td>- FormalGreen</td>
</tr>
<tr>
<td>- Emailed and PDF Statements</td>
<td>- FormalGrey</td>
</tr>
<tr>
<td>- Printed and On-screen Statements</td>
<td>- FormalMagenta</td>
</tr>
<tr>
<td></td>
<td>- FormalOrange</td>
</tr>
<tr>
<td></td>
<td>- ProgressBlue</td>
</tr>
<tr>
<td></td>
<td>- ProgressGreen</td>
</tr>
<tr>
<td></td>
<td>- ProgressGrey</td>
</tr>
</tbody>
</table>

- Insert a Logo
- Compare the old form to the new form
Forms designer enhancements
Forms Designer, a more complex method of customising your documents, has the following new enhancements:

<table>
<thead>
<tr>
<th>Enhancement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Border Colour and Fill Colour on Boxes</td>
<td>Customise your documents by changing the border colours and the colours of the boxes on the documents.</td>
</tr>
<tr>
<td>Rounded Corners on Boxes</td>
<td>You can change the boxes from square corners to rounded corners to enhance the look of your documents.</td>
</tr>
<tr>
<td>Snap to Grid</td>
<td>Snap your lines and boxes to the grid to ensure that all items are correctly aligned.</td>
</tr>
<tr>
<td>Convert all Text and Fields to Individual Font</td>
<td>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.</td>
</tr>
<tr>
<td>Convert to Greyscale</td>
<td>Convert your document to greyscale to ensure that the document is not printed in colour on a colour printer.</td>
</tr>
<tr>
<td>Colour Replacement Tool</td>
<td>Select a colour and replace the selected colour with a new colour throughout the document.</td>
</tr>
<tr>
<td>Select all Same Colour</td>
<td>This option selects all items in the form that are the same colour and you can reformat these selected items.</td>
</tr>
</tbody>
</table>

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**

![Rounded Corners](image_url)
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.

<table>
<thead>
<tr>
<th>Menu Access</th>
<th>User A</th>
<th>User B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Email</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF with Images</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word with Images</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel with Images</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF with Images and Colors</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word with Images and Colors</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel with Images and Colors</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF with Images and Colors and Watermarks</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word with Images and Colors and Watermarks</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel with Images and Colors and Watermarks</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF with Images and Colors and Watermarks and Barcodes</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word with Images and Colors and Watermarks and Barcodes</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel with Images and Colors and Watermarks and Barcodes</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to PDF with Images and Colors and Watermarks and Barcodes and QR Codes</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Word with Images and Colors and Watermarks and Barcodes and QR Codes</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Print to Excel with Images and Colors and Watermarks and Barcodes and QR Codes</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>
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.

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.
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 import product information. Your computer will need to be connected to the internet to get the important information.

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.

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.
Online E-learning purchases

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

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

Selected Document Types

- Email and PDF Documents
- Printed and On-screen Documents

Select Colour Template

Email and PDF Documents:

Select an enhanced layout from the drop-down list. After selecting, click on the form to preview it. Click Next to continue.

Current Form Layout

- Finalised
- FormBlue
- FormGreen
- FormGrey
- FormMagenta
- FormOrange
- FormRed
- FormWhite
- FormYellow

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.

---

**System Changes Audit Trail**

<table>
<thead>
<tr>
<th>Action Date</th>
<th>Time</th>
<th>User</th>
<th>Description</th>
</tr>
</thead>
</table>
| 06/09/16    | 13:59| User0| User chose not to create a backup during Year End on computer PASJHINB

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.
# Cheat Sheet – New Icons

## PASTEL MENU BAR ICONS

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>📃</td>
<td>📃</td>
<td>📂</td>
<td>📂</td>
</tr>
<tr>
<td>Open a Company</td>
<td>Process Customer Documents</td>
<td></td>
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<tr>
<td>📚</td>
<td>📚</td>
<td>📍</td>
<td>📍</td>
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<tr>
<td>Process Supplier Documents</td>
<td>Process Cashbooks</td>
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<td>📍</td>
<td>📍</td>
<td>📔</td>
<td>📔</td>
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<tr>
<td>Process Bank Reconciliation</td>
<td>Process Journals</td>
<td></td>
<td></td>
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<tr>
<td>📔</td>
<td>📔</td>
<td>📈</td>
<td>📈</td>
</tr>
<tr>
<td>Process Point of Sale</td>
<td>Edit Customers</td>
<td></td>
<td></td>
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<tr>
<td>📈</td>
<td>📈</td>
<td>🍂</td>
<td>🍂</td>
</tr>
<tr>
<td>Edit Suppliers</td>
<td>Edit Inventory</td>
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<td>🌋</td>
<td>🌋</td>
<td>🌋</td>
<td>🌋</td>
</tr>
<tr>
<td>Graphs / Financial Ratios</td>
<td>Intelligence Reporting</td>
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<td>🌋</td>
<td>🌋</td>
<td>🛡</td>
<td>🛡</td>
</tr>
<tr>
<td>Dashboard Reports</td>
<td>Pastel Debtors Manager</td>
<td></td>
<td></td>
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<tr>
<td>🛡</td>
<td>🛡</td>
<td>📤</td>
<td>📤</td>
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<tr>
<td>Pastel Fax</td>
<td>Pastel Payroll</td>
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<tr>
<td>📥</td>
<td>📥</td>
<td>🌐</td>
<td>🌐</td>
</tr>
<tr>
<td>Connected Apps</td>
<td>E-learning</td>
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<tr>
<td>🌐</td>
<td>🌐</td>
<td>📞</td>
<td>📞</td>
</tr>
<tr>
<td>Pastel Explorer or Navigator</td>
<td>Note Facility</td>
<td></td>
<td></td>
</tr>
<tr>
<td>📞</td>
<td>📞</td>
<td>🎉</td>
<td>🎉</td>
</tr>
<tr>
<td>Live Chat</td>
<td>Help Menu</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## ICONS REMOVED FROM THE MENU BAR

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌊 RSS Feeds</td>
<td>Sage Pastel Iron Tree online Backup</td>
</tr>
<tr>
<td>🛒 Sage Pastel Online Store</td>
<td>Internet</td>
</tr>
</tbody>
</table>