

List of changes from Partner V11 to V12

1. Tax Manager

To ensure correct tax reconciliations and tax reporting to SARS, it is essential that the Tax Period is closed. In Tax Manager you will setup your Tax reporting periods and process your transactions as usual. At the end of each tax period, you will print your report and close the Tax Period. Any transactions that are backdated to a closed period will automatically form part of the next Tax period.

2. Conversion Assistant

The conversion assistant can now convert multiple companies in one session.

3. Customer Processing

A warning will display when using the same reference number per customer on All Updatable Customer Documents.

4. Point of Sale

A facility for Pack Sizes has been added. The Pack Size facility allows the retailer to repack their stock into smaller or larger quantities for resale. If a retailer purchased stock in packs of 6 items, the retailer can then repack the stock as single items or repack the items of 6 into cases of 24.

5. New features added to Debtors Manager include:

Debtors Dashboard - The dashboard gives management instant visibility of debtor's status and collection activity.

Sales Analysis Report - 12 month rolling sales analysis, displaying sales per customer, per month.

SMS Payment Reminder – Send automated SMS payment reminders to overdue customers.

Summarised Contact Report - This report displays an overall view of the age analysis, the latest contact notes saved, as well as PTP's saved.

6. Automatic Updates

An automatic update feature has been included which will automatically update your Pastel Accounting. The automatic update can be set to check for updates when opening Pastel Accounting, on a daily basis or on a weekly basis. A setting has been included to always ask before downloading the updates and while downloading the update a progress bar displays. Before the update is downloaded, a history of changes made will be displayed.