

**Ensuring Optimal Speed  
Performance & Efficiency of  
Sage 200 Evolution company.  
Preventing Slowness and  
Latency/Hanging issues in  
Company across Network**

**Sage**

## Outline:

This article explains how to ensure that your Evolution companies and network are working at maximum speed performance and efficiency levels.

Applying the advice in this article should also greatly prevent frustrations experienced with **Inefficiencies-, Slowness-, Latency issues, and/or related Errors** (further referred to as **ISLE**) in the general navigation, record maintenance, processing, reporting, importing, enquiring in the company, Branch Accounting syncing, etc., in addition to basic company opening/closing actions.

Therefore, carefully consider and apply the advice provided below. Each time, test the outcome before moving on to the next point on the list.

### **Please also note:**

For several of the advice points as provided below, you should consult with your local IT technician and/or Evolution Business Partner to ensure they are properly adhered to.

## Solution / Details

Note that all tips and advice on resolving **ISLE** issues in this article resort under the following categories:

- Section A: General Network, Hardware, Environmental Setups and Factors
- Section B: MS SQL Database Related Setups and Issues
- Section C: Running System Utilities
- Section D: Evolution- & Company Setups, -Status and -Content
- Section E: Slow previewing/printing of reports/documents

## Section A: General Network, Hardware, and Environmental Setups and Factors

### 1. Adhering to Sage's recommended server and workstation system specifications

A host of network related errors may be due to insufficient Operating System version, PC RAM and/or PC Chip speed specifications on the server and/or workstations.

Open the following link to download a detailed PDF guide that outlines the minimum required server and workstation specifications for working with Sage Evolution:

#### [Sage 200 Evolution System Requirements](https://www.sage.com/en-za/-/media/files/sagedotcom/master/documents/pdf/sage%20200%20evolution%20system%20requirements.pdf?la=en-za&hash=E7F38C0D5C02185F1DA21197F64A0ECC)

<https://www.sage.com/en-za/-/media/files/sagedotcom/master/documents/pdf/sage%20200%20evolution%20system%20requirements.pdf?la=en-za&hash=E7F38C0D5C02185F1DA21197F64A0ECC>

#### **Please note:**

The recommended specifications provided should be regarded as those exclusively allocated and used by MS SQL Server/Express and Sage Evolution.

### 2. Running other, resource hungry applications on the Evolution/MS SQL Server/workstations

Be careful when also running resource-hungry applications on the Evolution server and/or workstations and adjust their PC RAM and PC chip speeds as required.

For example, you may be running applications such as MS Exchange Server on the MS SQL Server/Evolution server. Setting it up this way could lead to competing system resources on the MS SQL/Evolution server and thus result in ISLE issues as Evolution is struggling for resources.

In addition, consider other resource-hungry applications such as POWER-BI or other report applications that are scheduled to run at specific time intervals. You may observe a significant dip in Evolution Company's performance across the network when the reports are running.

Therefore, rather set up the report running intervals to occur after working hours, e.g. after 12:00 AM.

Otherwise, you should consider increasing the server's chip speed and RAM to accommodate all processes/applications to prevent ISLE issues.

### 3. Preventing, fixing, and diagnosing network errors and issues: Network Health and Diagnostic Protocol

The Sage Evolution Network Health and -Diagnostic Protocol (referred to as the Protocol below) is a comprehensive set of guidelines and advice on how to prevent, fix, and perform various network diagnostic and hardware validation tests, to identify the primary cause of several network related errors and issues that can then be addressed by your local IT technician.

These errors and issues may be randomly observed in various instances, e.g., locating or opening an Evolution company, processing, navigating in the company, etc.

## The Protocol's stated objectives:

- To find and identify the cause of network related issues/errors that may have a detrimental effect on working in Evolution across the network, to have them ultimately resolved.
- To assist in identifying the cause of both MS SQL- and other network related issues and errors.
- To promote maintaining a healthy and stable network for Sage Evolution.
- To help ensure a fast-paced, robust network that increases productivity and efficiency without frustrating interruptions; and
- To generally prevent potential company data corruption due to network drops or errors.

## To conclude:

By applying the Protocol, you should have a healthy and strong network environment in which Sage Evolution can thrive, and that should also lead to increased speed and efficiency performances.

In addition, you'll also be able to efficiently prevent/counter several potential network issues/errors, as a core principle of the Protocol is exactly that: **Prevention is Better than Cure!**

Open this link for a detailed article on the Protocol:

## Network Health and Diagnostic Protocol

### URL:

<https://za->

[kb.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=200324135316637&page=1&position=2&q=Preventing%2C%20Fixing%20%26%20Diagnosing%20Network%20Errors%20%26%20Issues%20-%20Network%2C%20Health%20and%20Diagnosing%20Protocol](https://za-kb.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=200324135316637&page=1&position=2&q=Preventing%2C%20Fixing%20%26%20Diagnosing%20Network%20Errors%20%26%20Issues%20-%20Network%2C%20Health%20and%20Diagnosing%20Protocol)

## 4. Integrating with 3rd party / external applications and/or foreign objects included in the company database

Your Evolution company may:

- be linked/integrated with 3rd party / external application(s) and/or
- have foreign objects (triggers, stored procedures, tables, and/or views, etc.) linked to the company database.

Please note that there is **nothing wrong** in principle with the above added infrastructure. However, it may be that this setup could lead to possible ISLE issues in the Evolution company when the setup is not properly done.

You should consider an improper setup as a possible reason for having company ISLE issues. Therefore, if needed, consult with the relevant 3<sup>rd</sup> party developer that established the above infrastructure. Have it properly tested, fine-tuned to ensure it's not causing undue ISLE issues.

## Testing should at least include the following steps:

1. Backup the live company and restore it as a new database called e.g., DEMO.
2. In the DEMO company, drop all foreign objects and the integration to any 3<sup>rd</sup> party integration software.

- Now properly test processing, reporting, navigation, etc. on this company and check if there are any improvements in efficiency, speed, and no errors.
- If ISLE issues are resolved in the DEMO company, then systematically troubleshoot the foreign objects and 3rd party integration (if relevant) setup in the live company environment until resolved.

## 5. Corrupted Agent or Agent Registry keys

Specific agents' local PC Registry Editor keys may be corrupted, and this could be the source for having ISLE issues on their local PC's. One clue for this source is that only a specific agent on the network is experiencing ISLE issues.

Therefore, consider deleting all the agents' Registry Keys, including the agents' Registry folder itself, on the local PC of each agent. Alternatively, do the same when working in an RDP or any kind of centrally hosted environment.

Open this link for a detailed guide on how to accomplish it:

### Deleting Agent Registry Editor Key

**URL:**

**<https://za-kb.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=200331160304539&page=1&position=1&q=DELETING%20AN%20AGENT%E2%80%99S%20REGISTRY%20EDITOR%20KEY>**

## 6. Deleting unnecessary system files

Do the following to increase Evolution company loading speeds per PC:

- Close Evolution on the local PC.
- Go to the following Evolution installed subfolder.  
C:\Program Files (x86)\Sage Evolution\Addins.
- Identify which of the add-ins listed below are not used by the Evolution user on the local PC and delete them (or alternatively cut and save them in a location outside of the Evolution folder):

Name	Date modified	Type	Size
Evolution.MailMerge.AddIn.dll	2014/10/16 12:21 ...	Application extens...	1,508 KB
Evolution.Utilities.AddIn.dll	2014/11/05 1:02 PM	Application extens...	1,079 KB
Pastel.Evolution.BIC.Addin.dll	2014/06/27 9:17 AM	Application extens...	148 KB
Pastel.Evolution.DataExport.dll	2014/10/16 12:21 ...	Application extens...	743 KB
Pastel.Evolution.DataImport.dll	2014/10/16 12:21 ...	Application extens...	1,027 KB
Pastel.Evolution.DiagnosticTool.Core.dll	2014/04/22 9:31 AM	Application extens...	1,937 KB

- If you open any Evolution company, you should notice that the loading of the deleted add-ins is no longer observed, and the company should open much faster.
- Repeat steps 1 to 3 on all other workstations.

6. If you need these add-ins to be available later, copy them back into the above folder (while Evolution is closed).

## **7. Performing Internet Upload and Download Speed Tests**

Especially for Offline Branch Accounting, clients who observe slowness in uploading and downloading speeds need to consider the following:

1. Obtain a decent Internet Upload and Download speed testing software package.
2. You can then formally analyse and evaluate your general Internet speed/performance and draw your own conclusions if it needs to be improved by, e.g., upgrading to a better Internet package, addressing hardware issues, etc.

## **8. Regularly restarting the Evolution Server / MS SQL Server PC's**

You should implement a schedule in which the Evolution and MS SQL server PC's are regularly restarted (with all Evolution users logged out), e.g. once a week.

Doing this should prevent any memory/cache built up on the server/s and therefore contribute to enhancing the general performance of working in Evolution.

## **9. Available hard drive space on Evolution/MS SQL Server and workstations**

It's a known fact that PCs (servers and workstations) perform better when their hard drives are not nearly full.

Please consult with your local IT technician to provide advice on the allowed used-up space of the servers' and workstations' hard drives before ISLE issues may be observed in Evolution.

As required, clear up/delete/move to other drives as many redundant files/folders as possible to remain within the allowed space limitation.

## **10. Adding Sage Evolution and MS SQL as exceptions/exclusions on the local Windows Firewall and Antivirus packages**

It's always recommended to add both Sage Evolution and MS SQL Server as application exceptions on the local server's/workstations' Windows Firewall and on the local anti-virus packages.

Especially for anti-virus packages, note that all incoming and outgoing traffic gets scanned. If Evolution and MS SQL are added as exceptions, this scanning should not occur, leading to potentially higher levels of performance when working in Evolution.

## **11. Number of Evolution users**

You may observe that as more Evolution users (agents) log onto the company/ies, ISLE issues are increasing progressively.

If Evolution becomes unbearably slow when all users are logged on, consider the following:

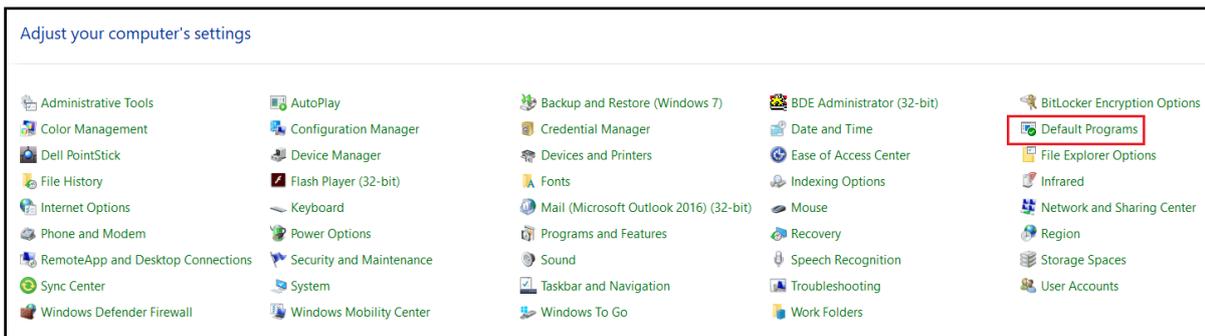
- upgrading from, e.g., MS SQL Express to MS SQL Standard or Enterprise editions (if working with the Express edition), or

- upgrading your main Evolution server (and/or the server where MS SQL Server is running, if on a different server box as the Evolution server), with a higher RAM and/or chip speed.
- until you're again satisfied with Evolution's general performance.

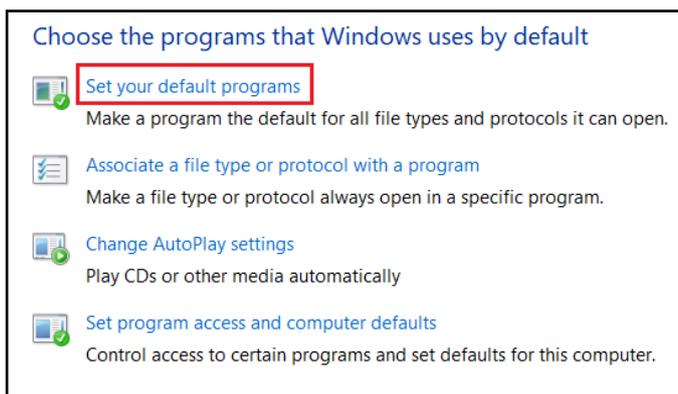
## 12. Default Email Application

Do the following to increase the speed and efficiency of mailing documents and reports in the Evolution company.

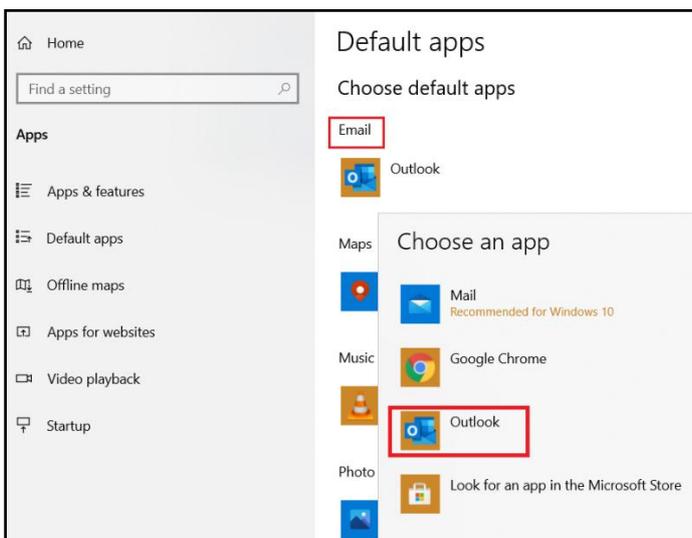
1. On the local PC where Evolution is used, go to **Control Panel | Default Programs**



2. Open the **Set your default programs** link below.



3. Select your relevant default application under the Email heading, e.g., Outlook.



4. Repeat the same steps on the Evolution server and workstations where e-mails are sent out of the company.

### 13. General PC Maintenance

As with any office PC, your local IT technician should always perform proper PC maintenance routines on the Evolution server and all workstations to achieve optimal PC performance.

Such maintenance routines should ensure (among a couple of things)

- Clear the hard drive to ensure it has at least 15% to 20% free available space.
- Run regular PC defragging (e.g., once every 6 months).
- Ensure the local antivirus is up to date.
- Clear old cache files in various locations on the PC.
- Ensure all local PC drivers are up to date.
- Anything else that the IT technician should deem appropriate to improve PC performance.

### 14. Optimizing/Increasing the network speed between the Evolution server and all workstations

Open the following link for a detailed guide on how to optimize the network speed between the Evolution server and all workstations:

**<https://za-kb.sage.com/portal/app/portlets/results/view/solution.jsp?solutionid=200526054148023&page=1&position=1&q=Optimising%2FIncreasing%20the%20network%20speed%20between%20the%20Evolution%20server%20and%20all%20workstations>**

### 15. Improving Evolution's opening speeds

You may notice that it takes several seconds, e.g., 1 minute or more, just to open Sage Evolution after double-clicking on the Evolution desktop icon, just to land on the company opening screen.

Note that this issue may be especially relevant to RDP / Terminal Server environments (but can also be observed in a normal LAN setup) with all users observing the above-mentioned slowness.

#### Solution

Consider the following 3 main strategies that should be considered to resolve the above issue.

#### A. OSI Model

Please involve your local IT Technician to assist in implementing the advice discussed below:

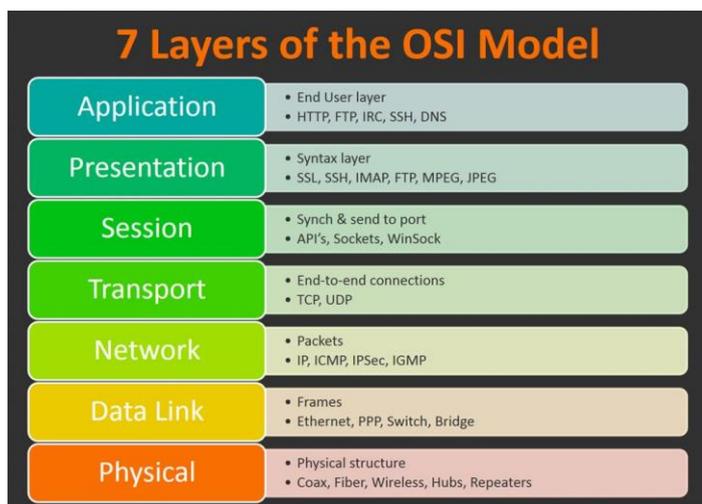
OSI Model Defined:

As taken from **<https://www.imperva.com/learn/application-security/osi-model/>**

“The Open Systems Interconnection (OSI) model describes seven layers that computer systems use to communicate over a network. It was the first standard model for network communications, adopted by all major computer and telecommunication companies in the early 1980s”

This means your IT technician should do a complete systems/performance audit on all 7 layers below, starting at the Physical-, and working his way up to the Application layer.

Also note that the performance of lower layer/s always affects the performance of the layers on top of them. This implies that if you have any slowness, sub-par performance issues in e.g., the Physical and Data Link layers, performance in all layers higher than those are automatically also not running at an optimal level.



## B. Upgrading to Sage Evolution version 10.1

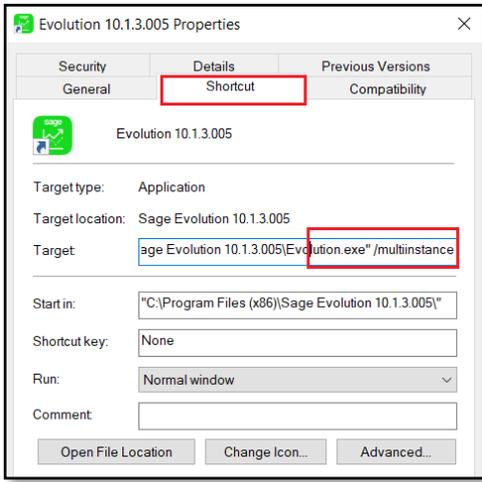
You may find that upgrading to Sage Evolution version 10.1 or higher may result in immediate speed improvements in opening Evolution.

In a recent query, such improvements were observed when the client upgraded from Evolution version 7.20 to a higher version.

## C. Running Multi-instance on Evolution shortcut

Apply the following steps on each Evolution workstation:

1. Close Evolution on the local PC.
2. Right-click on the Evolution shortcut icon and select **Properties**
3. On the Shortcut tab, enter a single space after the .....Evolution.exe” phrase and then add **/multiinstance** as can be seen below. When done, save the change.



## D. Running the Process Monitor

The Process Monitor is a Windows diagnostic utility that can be used to, among other things, analyze and measure various issues such as the slowness, and latency of opening an Evolution company.

Open this link for more details on how to set it up and use it:

<https://zabk.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=241118175133637&page=1&position=0&q=241118175133637>

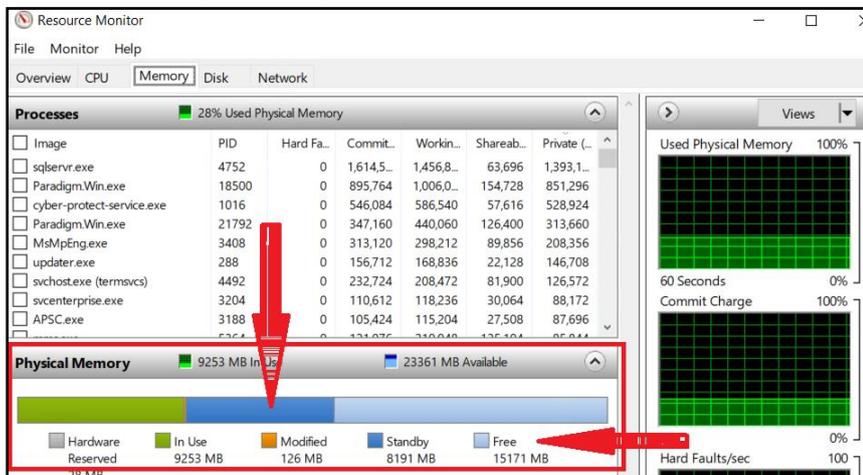
## 16. Upgrading to a Solid State Hard Drive (SSD)

Consider upgrading to a high-quality Solid State hard drive on your Sage Evolution, SQL Server, and RDP servers (as relevant), if separate from each other.

## 17. RAM / Memory Optimizer software

Windows places a large amount of 'Free' memory into 'Standby' mode (caches it) when working in Evolution or any PC application.

Even though it's supposed to be available, Evolution appears to be unable to access it, resulting in certain periods of efficiency dips and certain intermittent errors. This is even despite there being more than enough 'Standby' memory.



Document Version 2025.01

Therefore, consult with your local IT technician to implement RAM Optimiser software to properly release the 'Standby' memory, thereby preventing the above issues.

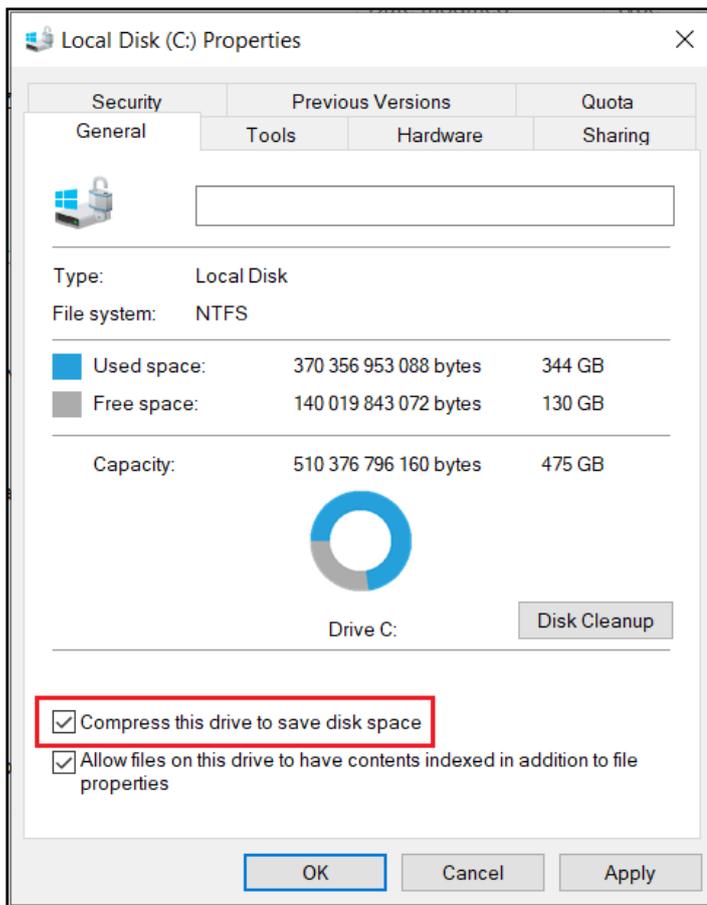
Once implemented, you may notice speed improvements in your Evolution company.

### 18. Increase RAM allocation for MS SQL Server

Consult with your local IT technician about increasing RAM (memory) allocation for the MS SQL Server instance.

### 19. Compressed Hard Drive of Evolution Server and Workstations

Always refrain from compressing the Server and workstations' hard drives.



If any Evolution server or workstation PC hard drive is currently compressed, uncompress it.

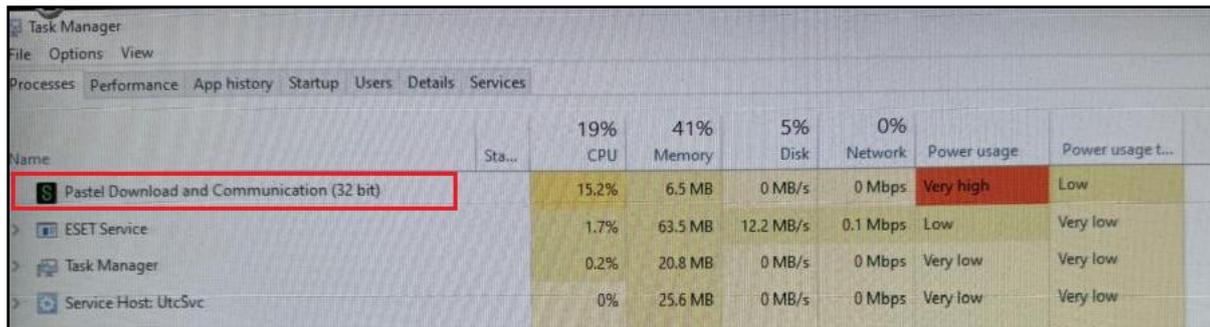
## 20. 'Sage Connected Services' installed on Evolution Server and/or Workstation PC

Sage Connected Services may be installed on the Evolution Server and/or Workstation PCs.

This application is installed as part of Sage50c (Sage Pastel Partner) and used as a reminder service. However, sometimes, it becomes highly resource-hungry and can cause local and network PC hanging issues. In addition, it can also cause Evolution companies on the workstations to close unexpectedly.

### Also, notice the following:

It should display a **Pastel Download and Communication** on the local PC's Task Manager. Its **Power Usage** indicator may be set to **Very High**, especially when it's currently consuming a high level of PC resources.



The screenshot shows the Windows Task Manager Performance tab. The 'Pastel Download and Communication (32 bit)' process is highlighted with a red box. The table below represents the data shown in the screenshot:

Name	Status	CPU	Memory	Disk	Network	Power usage	Power usage t...
Pastel Download and Communication (32 bit)		15.2%	6.5 MB	0 MB/s	0 Mbps	Very high	Low
ESET Service		1.7%	63.5 MB	12.2 MB/s	0.1 Mbps	Low	Very low
Task Manager		0.2%	20.8 MB	0 MB/s	0 Mbps	Very low	Very low
Service Host: UtcSvc		0%	25.6 MB	0 MB/s	0 Mbps	Very low	Very low

Therefore, it should be advisable to uninstall the 'Sage Connected Services' as it's listed on the local PC's Control Panel | Programs screen.

## 21. New Windows User Account

Consider creating a new Windows user account for the relevant Evolution agent to use on his/her PC.

In some cases, unknown issues with the current Windows user may lead to inefficiencies and slowness in Evolution on the local PC.

## Section B: MS SQL Database Related setups and issues

### Please note:

- It's recommended that the advice in this section should preferably be applied by a professional Evolution support consultant.  
This is due to its requirement of having experience in working with and navigating in MS SQL Management Studio and running SQL scripts. Therefore, please contact either your Evolution business partner (BP) or Evolution Support for assistance.
- Before applying the solutions below, fully back up the relevant Evolution company and ensure all users are logged out.

### 1. Company Database MS SQL LOG file size has grown too large

When any new MS SQL database is created, the initial file size of the MS SQL LOG file (Log Data File = LDF) is about 576 KB.

However, as records are created and processing occurs in the company, its size can grow to such an extent that it has a detrimental impact, leading to potential ISLE issues.

However, it's not always easy to confirm when the current LDF file size has grown too large, resulting in ISLE issues in the company. This depends mainly on the number of Evolution users, the main company data file (MDF) size, the current level of ISLE symptoms observed, and the processing power of the Evolution server PC, to name but a few factors.

You should therefore apply your internal database management policies to constrain uncontrolled LDF file size growth.

Finally, as a rule of thumb, please open the link below to access a detailed guide to manually shrink the size of the LDF file once its size exceeds 1,5 to 2 GB.

### Shrinking Database LOG File

#### URL:

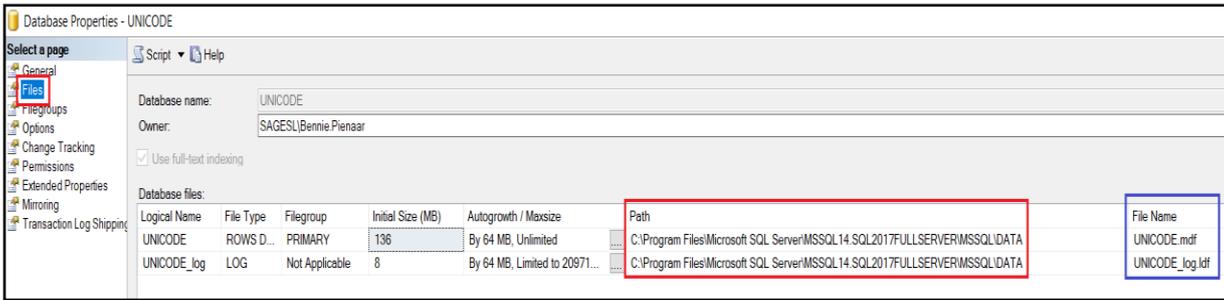
<https://za->

[kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200305053233799&page=1&position=2&q=MS%20SQL%20Database%20Maintenance%2C%20Issues%20and%20Objects%3A%20Shrinking%20a%20MS%20SQL%20company%20database%20log%20file](https://za-<br/>kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200305053233799&page=1&position=2&q=MS%20SQL%20Database%20Maintenance%2C%20Issues%20and%20Objects%3A%20Shrinking%20a%20MS%20SQL%20company%20database%20log%20file)

### 2. Company database's LDF and MDF files located on the same drive

Usually, both the MDF and LDF files of all Evolution company (and SageCommon) databases reside in the same drive and folder, e.g., both in the C:\Program Files\Microsoft SQL Server\MSSQLSERVER\MSSQL\DATA folder.

This can be confirmed by simply opening the **MS SQL Management Studio | relevant company database | Properties | Files** screen and noting the two file paths in the **Path** field.



However, you can consider separating the two files to reside on two different drives (e.g. on the C and D drives).

This may prove to enhance the company's efficiency, especially for large company datasets (e.g., larger than 10 GB).

### 3. Company database Generic Re-indexing Required

In some cases, the company's database needs to be re-indexed. Open the link below for a detailed guide on running a generic (manual) re-indexing of the company database tables.

#### Generic Re-Indexing of Database Tables

**URL:**

**<https://kb.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=200311102342609&page=1&position=1&q=Company%20General%20Maintenance%20Utilities%2C%20Tools%20%26%20Issues%3A%20Running%20a%20generic%20re-indexing%20of%20an%20Evolution%20company>**

### 4. MS SQL Express vs MS SQL Server

Even if you're running on a powerful server PC, please note that the MS SQL **Express** edition has a built-in limit on the processing power of the PC's chip and RAM (memory) it can actually use.

For instance, the 2016, 2017, and 2019 Express editions can only use 1.4 GB RAM and only 1 socket or 4 cores with regard to the actual chip speeds available to it (regardless of the server's actual PC specifications).

Therefore, please consider upgrading from MS SQL Express to perhaps SQL Standard or Enterprise if observing ISLE issues, when this factor becomes relevant.

For more details, refer to this link:

#### **Microsoft SQL Server Express: Version Comparison Matrix and Free Downloads**

**URL:**

**<https://www.fmsinc.com/microsoftaccess/SQLServerUpsizing/express/index.html>**

Here, refer especially to the image below for more details on the above discussed factor.

SQL Server Express Limitations						
There are many editions of the full version of SQL Server with Enterprise, Standard and Web being the most common. Here are some of the major differences of the 2017 version compared to the 2016 and 2017 Express editions:						
	Enterprise	Standard	Web	2019 Express	2017 Express	2016 Express
Maximum Database Size	524 PB	524 PB	524 PB	10 GB	10 GB	10 GB
Compute Capacity	OS Max	4 sockets or 24 cores	4 sockets or 16 cores	1 socket or 4 cores	1 socket or 4 cores	1 socket or 4 cores
Maximum Memory	OS Max	128 GB	64 GB	1.4 GB	1.4 GB	1.4 GB
Database Mirroring	✓	✓	✓	✓	✗	✗
Smart Backups, Encrypted Backups	✓	✓	✗	✗	✗	✗
SQL Profiler	✓	✓	✗	✗	✗	✗

Please also research the inherent limitations of MS SQL Express 2022 if in use.

## 5. Analysing the SQL server's memory status and performance

You may observe any number of error messages in the Evolution company, such as 'Access Violation', '..Select.int...', 'Deadlock...' , etc., related.

In addition, users across the network may also experience ISLE issues (e.g., poor performance issues such as the company hanging when moving between screens or when processing, reporting, and enquiring).

Fortunately, there is a way to properly diagnose the SQL server's performance by doing the following:

1. While the Evolution network is at peak traffic (while all Evolution users are still logged into the company/ies), run the SQL scripts below on the relevant SQL server to analyse, especially the current memory status of the SQL DB Engine.
2. Note that these scripts should be analysed by a qualified SQL Database Administrator. He should be able to decide on the appropriate course of action to ultimately resolve the abovementioned issues e.g., upgrading the server PC.

### Script 1

```
select * from sys.dm_os_sys_info
Select * from sys.dm_os_memory_cache_counters
select * from sys.dm_os_performance_counters
```

### Script 2

```
DBCC MEMORYSTATUS
```

### Script 3

```
SELECT
(physical_memory_in_use_kb/1024) AS Memory_usedby_Sqlserver_MB,
(locked_page_allocations_kb/1024) AS Locked_pages_used_Sqlserver_MB,
(total_virtual_address_space_kb/1024) AS Total_VAS_in_MB,
process_physical_memory_low,
process_virtual_memory_low
FROM sys.dm_os_process_memory;
```

3. The table below indicates the most common memory-related performance counters you should monitor if you're experiencing memory pressure on the SQL Server.

Object	Counter	Description
Memory	Available Bytes	Amount of memory available for processes; should be consistently higher than 5,000 KB.
Memory	Pages/sec	Should never climb consistently above 0.
Process	Page Faults/sec	A high value indicates excessive paging, which can result in both memory and the hard disk becoming performance bottlenecks. You must determine if the problem is being caused by SQL Server or by another process running on the system.
Process	Working Set	Monitor this value for each instance of SQL Server running on the system to determine the amount of system memory being used by SQL Server. This value should always be greater than 5,000 KB.
SQLServer: Buffer Manager	Buffer Cache Hit Ratio	For most applications, this value should be 90 or higher, indicating that most data requirements are being serviced from the cache. A lower value can indicate a memory bottleneck or a poorly designed application.
SQLServer: Buffer Manager	Total Pages	A low value here can indicate a need to install additional memory. Typically, a low number here is accompanied by a low Buffer Cache Hit Ratio.
SQLServer: Memory Manager	Total Server Memory (KB)	If this value is relatively high in comparison to total system memory, it's a good indicator that you should install more memory.

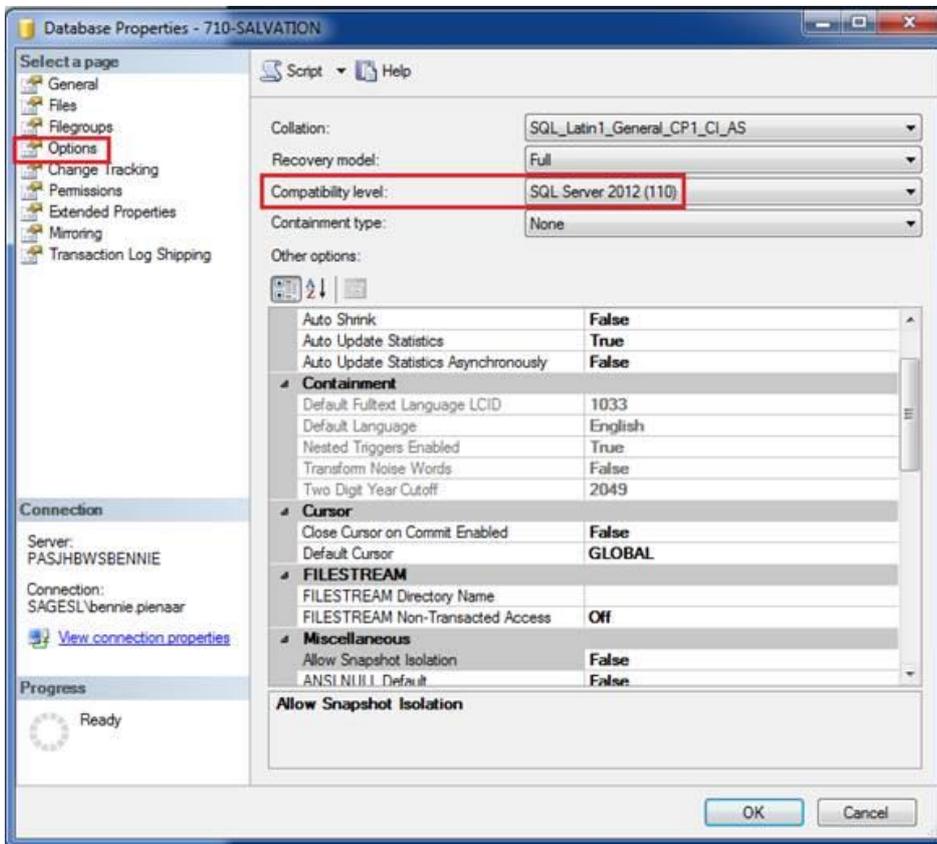
4. Also, run the same SQL scripts on the company database while all users are logged out, and then compare the results between running the script for the first time and the second time.
5. You should therefore now be able to form a more holistic perception and view of the general memory management and performance of your server's capabilities. Thus, being in a better position to decide on the way forward, e.g., upgrade to SQL Standard/Enterprise (from Express) or the server's RAM or perhaps even chip speed, etc.

## 6. MS SQL Compatibility Level

Consider the MS SQL Server's Compatibility Levels in relation to the Evolution version currently in use, and the recommended configuration.

For example, if you're running **MS SQL 2014** with Evolution version **7 or 7.10**, do the following:

1. Ensure all users are logged out of the company.
2. Open MS SQL Management Studio.
3. Back up the company database/s.
4. Go to Databases | right click and select **Properties on the relevant company database | Options | Compatibility Level**.
5. Set this value to SQL Server 2012 (not 2014) and save the changes.



6. Repeat steps 4 to 5 for all other Evolution companies.
7. For good measurement, restart the SQL server PC as a whole and not just the SQL DB Engine.

**Also note:**

- If running Sage Evolution version 7.10 and SQL Server 2012, ensure the Compatibility Level = SQL Server 2012 (the highest level available).
- If running Sage Evolution version 7.20 and SQL Server 2014, ensure the Compatibility Level = SQL Server 2014.
- If running Sage Evolution version 7.20 and SQL Server 2012, ensure the Compatibility Level = SQL Server 2012 (the highest level available).
- If running any Evolution version, and any SQL server version higher than 2012, e.g., 2014, then set up the Compatibility Level to the relevant SQL Server version.

**7. Truncating `_etbdeleted` and `_btbllogdetails` tables**

First, understand the use of the `_etbdeleted` table and `_btbllogdetails` tables:

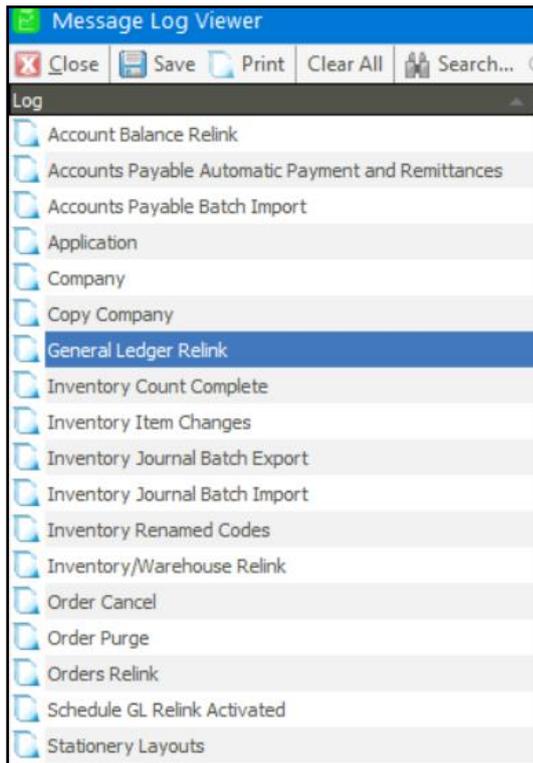
- **`_etbldeleted`**

This table stores all records that are deleted by users in the front end of a Branch Accounting company, e.g. source documents, master file records, etc.

- **`_btbllogdetails`**

This table stores the log details of the Administration | System Tools | Message Log Viewer.

The Message Log Viewer is used to view the results of all relinks (e.g. Inventory Relink) and several utilities (e.g. Copy Company) as run from within the company.



Over several months/years these tables may accumulate a huge, significant number of records and can contribute to general ISLE issues.

Therefore, consider deleting the contents of these tables by running truncating SQL scripts on them, **after backing up the companies and ensuring all users are logged out.**

Separately run the SQL scripts below on the company databases.

- **`_etbldeleted`**

Run this script on both the Head Office and Branch databases (if using Offline Branch Accounting).

```
truncate table _etbldeleted
```

- **`_btbllogdetails`**

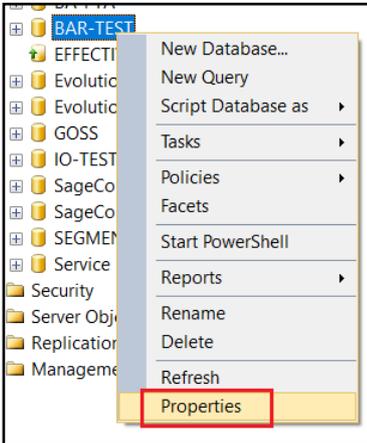
```
truncate table _btbllogdetails
```

## 8. Auto Shrink setting

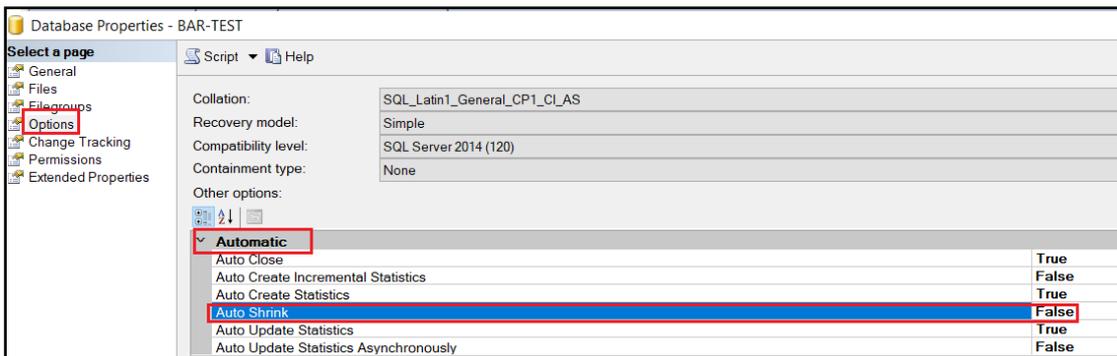
Always ensure that the Auto Shrink setting on the company database Properties screen is set to **False**.

**To confirm this setting, do the following:**

1. Ensure all users are logged out of the company.
2. Within MS SQL Management Studio, right-click on the relevant company database | Properties.



3. On the Options page, under the Automatic section, ensure the **False** setting is selected for the **Auto Shrink** setting.

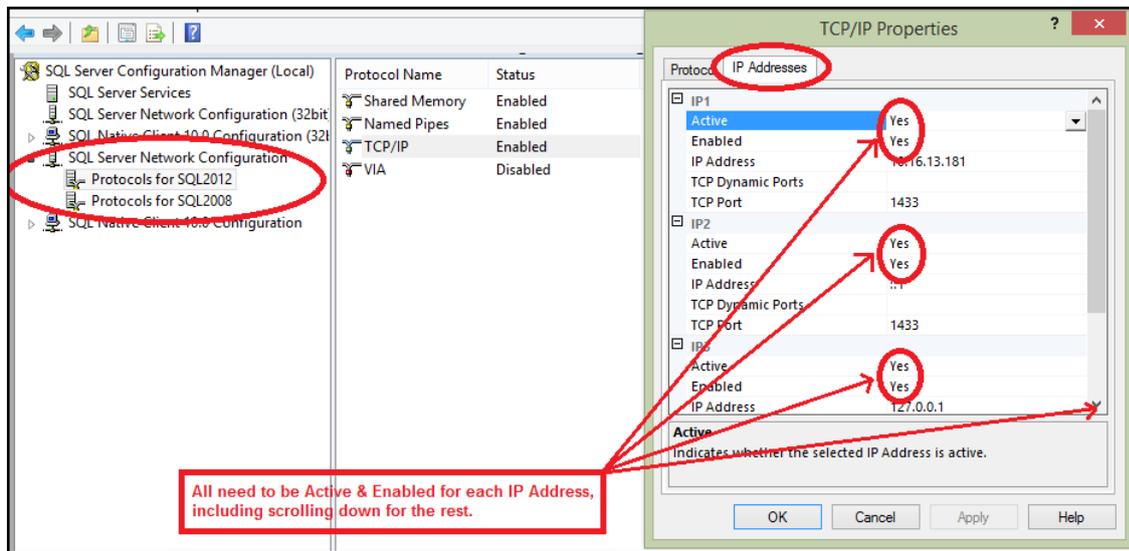


4. Repeat steps 2 and 3 for all other Evolution companies.
5. When done, restart the SQL server instance.

## 9. TCP/IP Enabled for all IP Addresses

Apply the following steps to ensure the above has been configured:

1. Open the MS SQL Server Configuration Manager.
2. Expand **SQL Server Network Configuration** (2nd from the bottom).
3. Double-click on the **IP Addresses** tab.
4. Here, ensure that all IP instances are active and enabled for your SQL instance as displayed below.



## 10. Number of MS SQL server instances installed and running

You may have more than one installed and running MS SQL server instance, and not all may be in use.

It should be obvious that all running SQL instances also take up memory resources and can thereby contribute to ISLE issues.

Even if only one additional SQL instance is unused but running, it may not necessarily be contributing towards ISLE issues, but consider the following logical principle:

At the end of the day, **all ISLE reasons/factors add up together**, and eliminating them should clearly lead to improvements in Evolution's general performance.

## Section C: Running System Utilities

### 1. Running the Evolution Database Management Utility

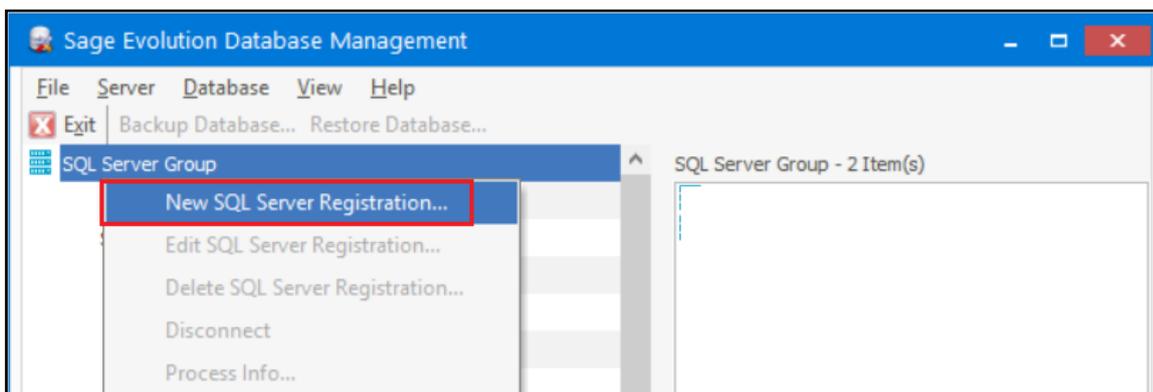
The Evolution Database Management utility accomplishes the company maintenance functions as listed below. As a result, they may improve the company's general speed and efficiency.

- Recompiles Stored Procedures
- Refreshes database views
- Updates statistics on all the tables
- Runs a DBCC Database Re-index

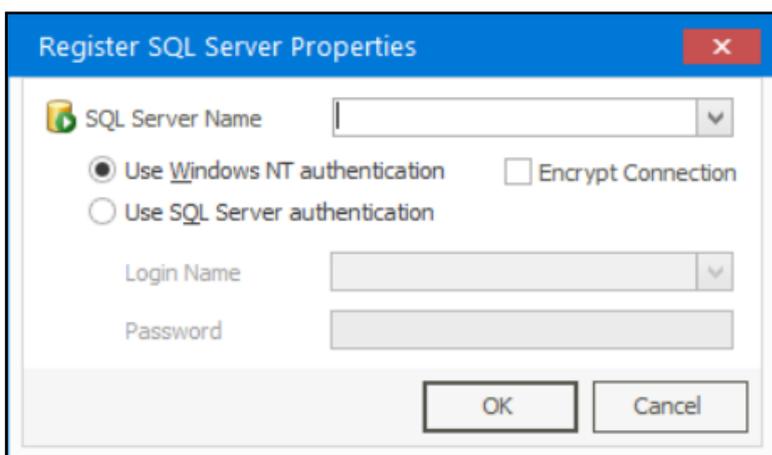
Apply the following procedures to run the Evolution Database Management Utility:

1. Ensure all users are logged out of the company, and then perform a company backup.
2. Within the installed Evolution folder on the server PC, find and open the EDM.exe file.
3. If needed, register the SQL server if the screen below opens.

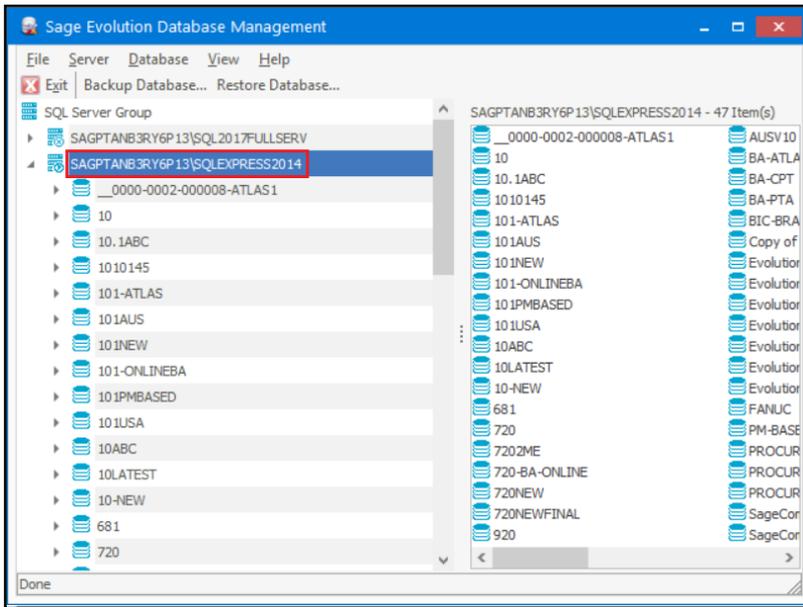
Do this by first right-clicking on **SQL Server Group | New SQL Server Registration**



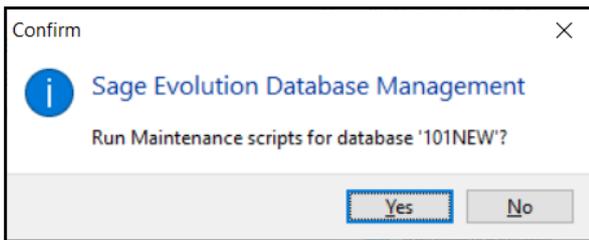
4. Enter the correct SQL server instance name and then select Windows NT Authentication (as the logged-on Windows account should have such permissions).



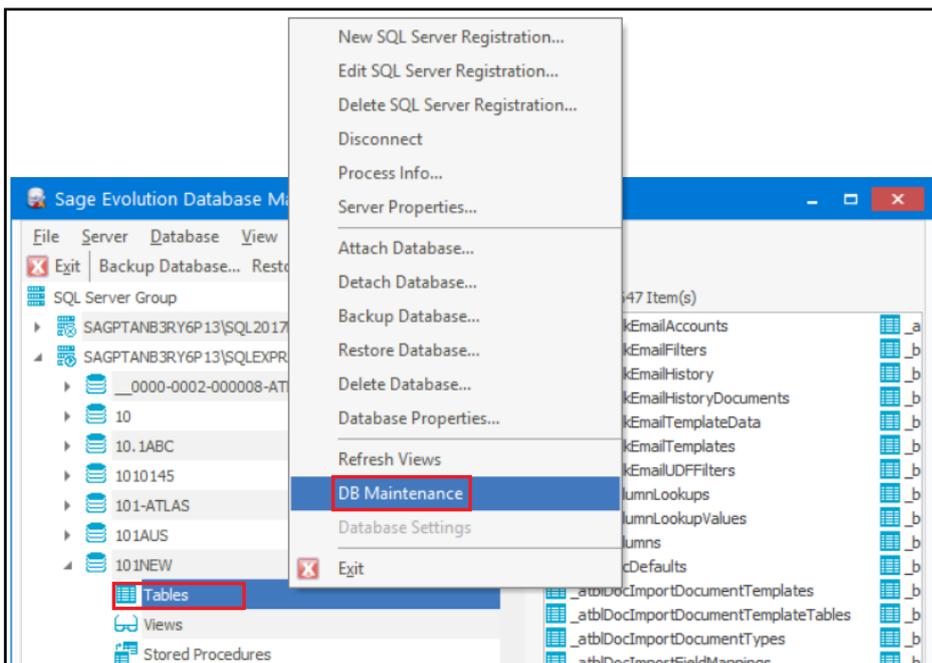
5. Expand the SQL instance on the top left of the screen to reveal the various, existing company databases that are running on the SQL server instance registered above.



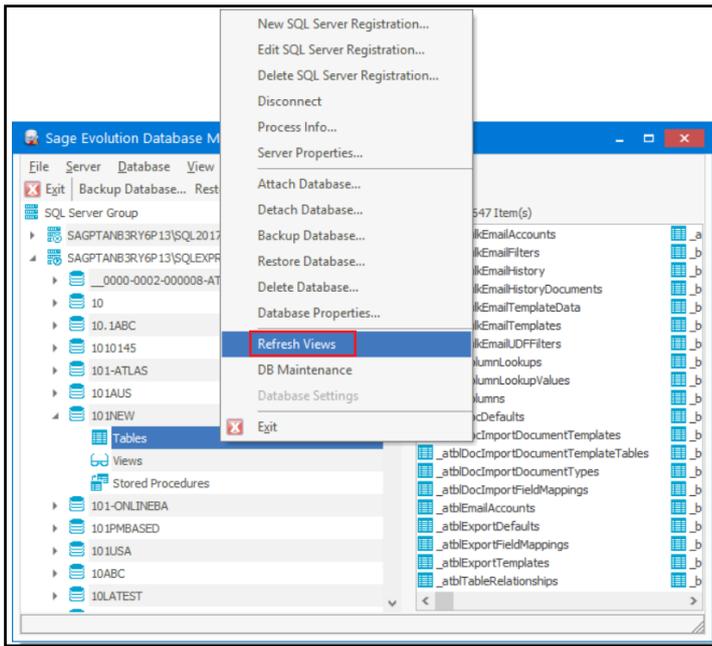
6. Double-click/expand the specific company database to reveal the Tables, Views, and Stored Procedures objects.
7. Right-click on the Views object and select DB Maintenance.
8. Click Yes on this message.



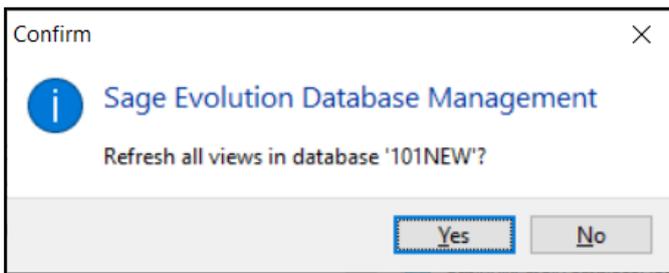
9. Now wait until it runs through (until the hourglass is no longer displayed).



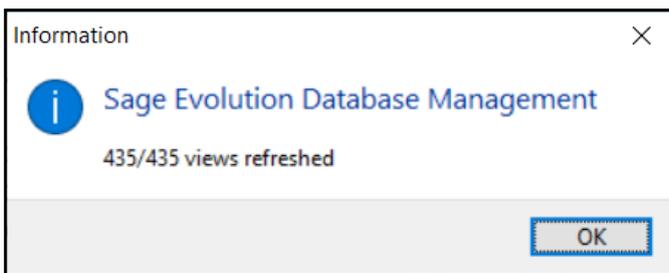
10. When done, right-click again on Tables and select the Refresh Views option.



11. Click Yes on this message.



12. When it's done, click OK on this message.



13. Back in the Evolution company, test if there are any speed/performance improvements. If not, please continue with the rest of the advice provided below.

## 2. Reducing 'Deadlock' related errors

You can also use the Database Management utility to significantly reduce the number of record-locking issues and errors.

For example, 'Deadlock' related errors may be observed by certain users, especially those working in companies with high daily transactional traffic.

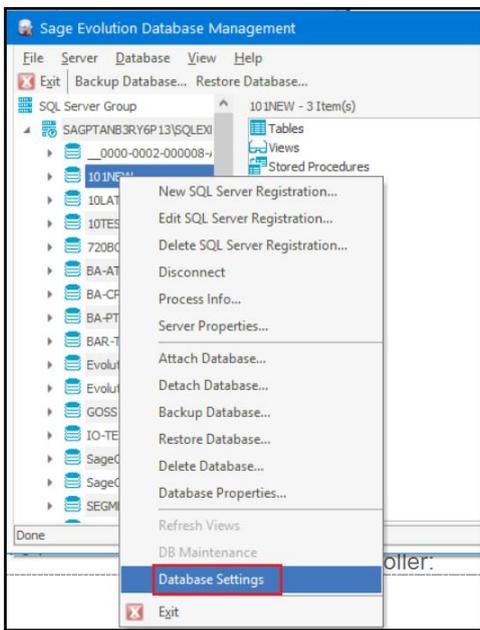
In addition to reducing the abovementioned error, applying the advice below may also improve ISLE issues.

This can be achieved by configuring the **Isolation Level** settings within the **Evolution Database Management** utility.

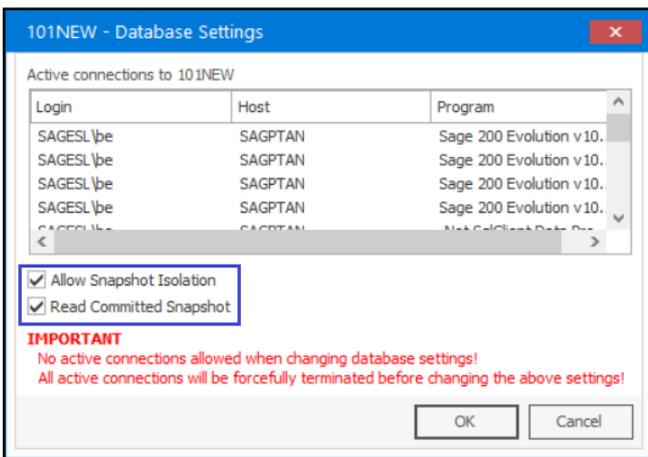
With the appropriate setting, the application can better manage the way in how processed data flows through the relevant SQL Server Database Engine.

**To configure the above settings, do the following:**

1. First, ensure **all users** are logged out of the Evolution company.
2. Open Evolution Database Management (double-click on the **EDM.exe** file within the Evolution installed folder).
3. Identify the specific Evolution company database, right-click on it, and select **Database Settings**.



4. Click on the options below to activate Isolation Levels and click on OK to save it.



### 3. Running a Full Copy Company

You can also consider running a Full Copy Company, which has proven to be a quick and sufficient way to resolve a host of ISLE issues and even certain data corruption instances, as opposed to performing a company data fix under certain conditions.

**Please note:**

You should only apply the steps in this article if you're **not working** in an **Offline Branch Accounting (BA)** environment.

If working in an **Offline** BA environment, the Full Copy Company Procedure is not allowed/not recommended. Running a Full Copy Company Procedure is allowed when working in an **Online**, or non-BA environment.

Click **this** link for a detailed guide discussing how to perform a Full Copy Company Procedure and the limitations to be considered.

**URL:**

<https://za-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200313132731784&page=1&position=0&q=200313132731784>

### 4. Running Company Relinks

The following 7 Relink types below are diagnostic and self-correction (where possible) relinking tools.

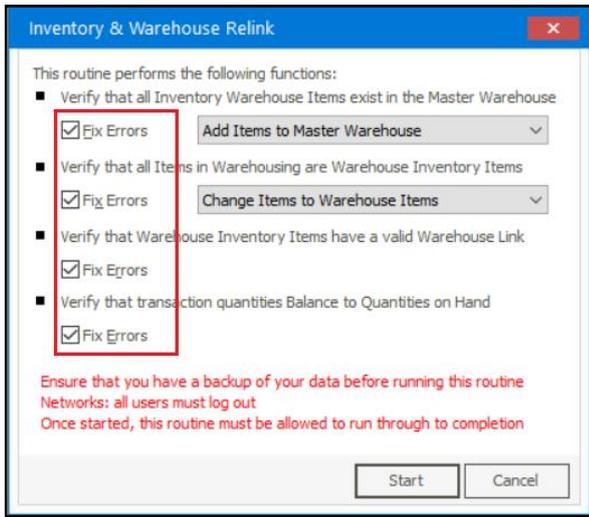
They can detect and correct certain errors/issues due to unexpected occurrences such as power interruptions, minor types of data corruption, or hardware failures. As a result, running these Relinks may also greatly improve, resolve, and prevent ISLE issues.

It's recommended to consult with an Evolution Support consultant (Evolution Support of your local Business Partner) prior to using these functions, as well as to assist you in understanding errors/issues reported in their individual Log files.

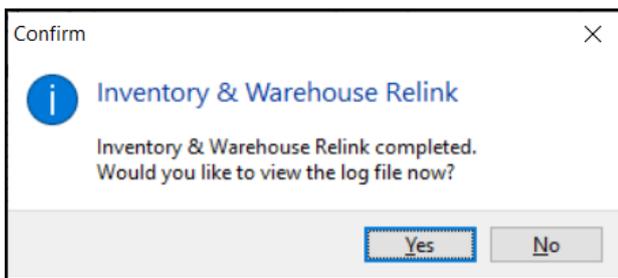
#### 4.1 Running an Inventory and Warehouse Relink

Apply the following steps to run the Inventory and Warehouse Relink:

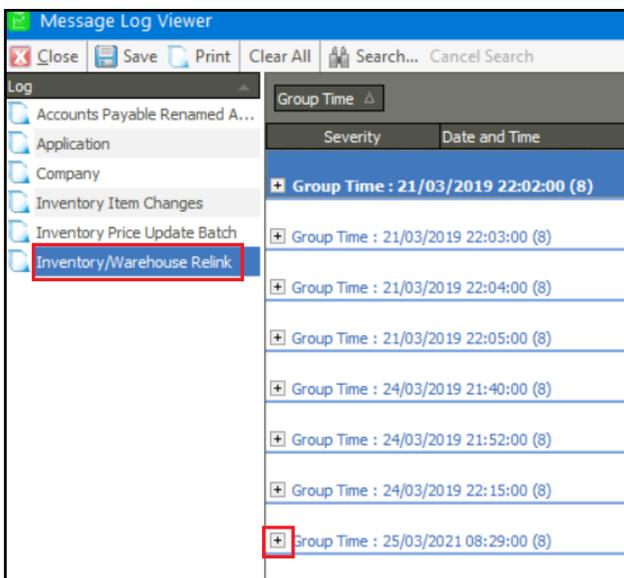
1. Back up the company and ensure all users are logged out of the company.
2. Go to Inventory | Maintenance | Inventory Relink.
3. Ensure all the options below are selected, and then click the Start button.



4. Click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



5. In the opened Message Log Viewer, expand the relevant/latest Inventory/Warehouse Relink Group Time record as marked below.



Carefully inspect the contents of the log below.

**Note the following:** In some cases, it may report on certain issues detected during the above Relink, but these issues have not been resolved.

Please consult with a professional Evolution consultant to help you understand and resolve such issues.

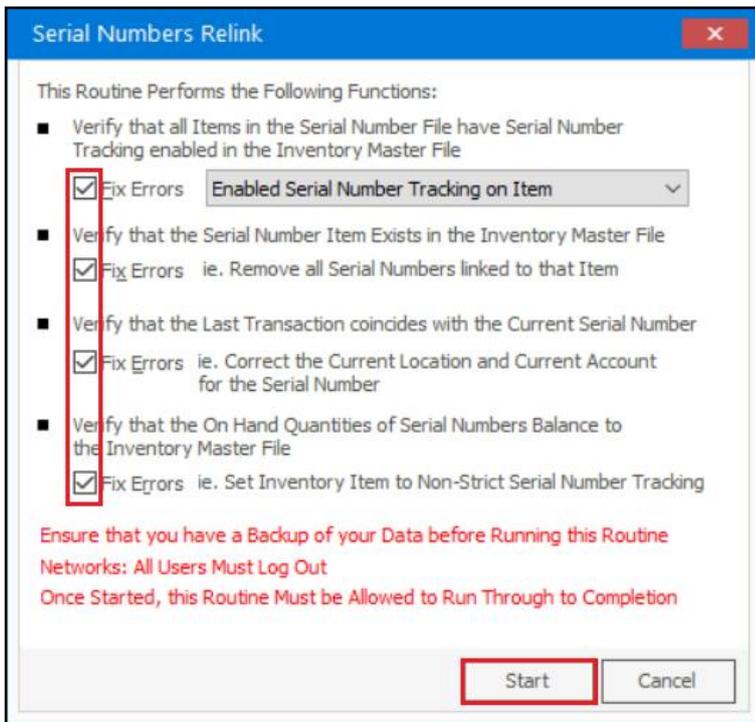
Group Time : 25/03/2021 08:29:00 (8)			
	25/03/2021 08:28:33	Inventory & Warehouse Relink started.	Admin
	25/03/2021 08:28:33	Items exists in Master Warehouse verified successfully.	Admin
	25/03/2021 08:28:33	All Items are Warehouse Items verified successfully.	Admin
	25/03/2021 08:28:34	Warehouse Quantities verified successfully.	Admin
	25/03/2021 08:28:34	Warehouse Inventory Items with valid Warehouse Link verified	Admin
	25/03/2021 08:28:34	Lot Tracking validated successfully - All Lot Tracking Rows exist.	Admin
	25/03/2021 08:28:34	Attribute Quantities verified successfully.	Admin
	25/03/2021 08:28:34	Inventory & Warehouse Relink terminated normally.	Admin

## 4.2 Running a Serial Number Relink

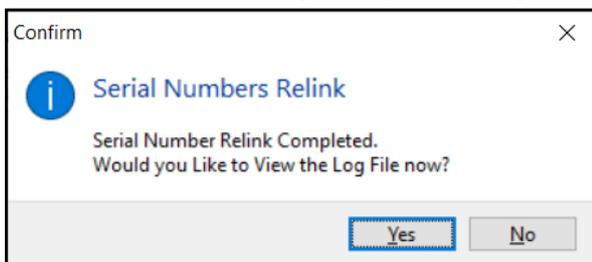
Apply the following steps to run the Serial Number Relink:

1. Back up the company and ensure all users are logged out of the company.
2. Go to Inventory | Maintenance | Serial Number Relink.

Select all options below and click the Start button to commence.



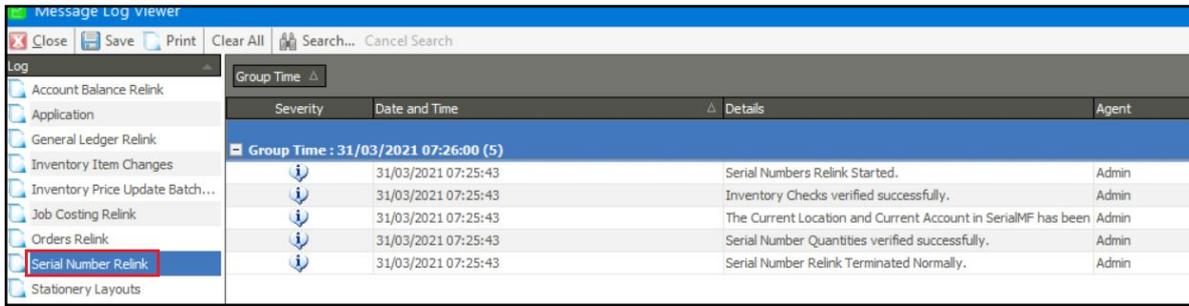
3. Click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



4. In the opened Message Log Viewer, expand the relevant/latest Group Time record.
5. Carefully inspect the contents of the log below.

**Please Note:** In some cases, it may report on certain issues detected during the above Relink, but these issues have not been resolved.

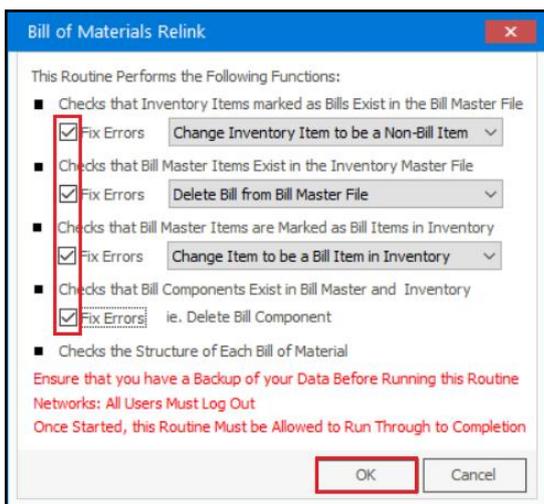
Please consult a professional Evolution consultant to help you understand and resolve such issues.



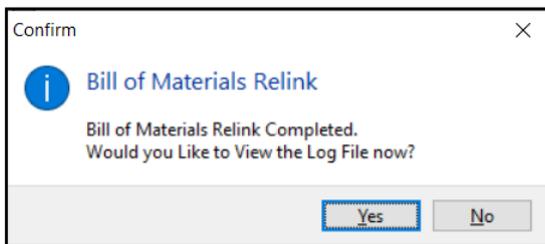
### 4.3 Running a Bill of Materials Relink

Apply the following steps to run the Bill of Materials Relink:

1. Back up the company and ensure all users are logged out of the company.
2. Go to Bill of Materials | Maintenance | Bill Relink.
3. Select all options below and click the OK button to commence.



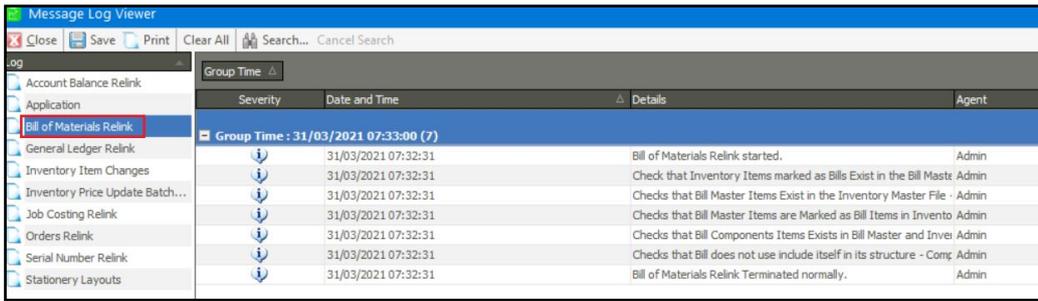
4. Click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



5. In the opened Message Log Viewer, expand the relevant/latest Bill of Materials Relink Group Time record.
6. Carefully inspect the contents of the log below.

**Note the following:** In some cases, it may report on certain issues detected during the above Relink, but these issues have not been resolved.

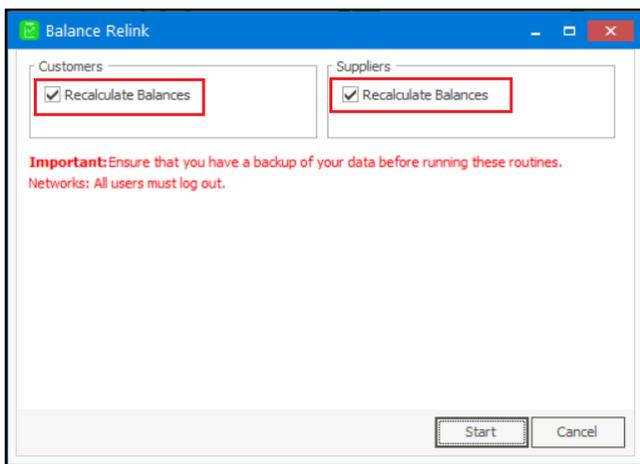
Please consult with a professional Evolution consultant to help you understand and resolve such issues.



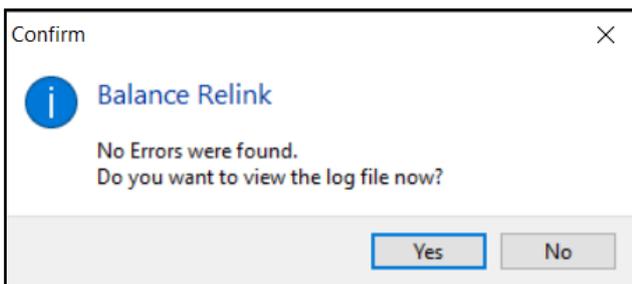
#### 4.4 Running a Customers / Suppliers Balance Relink

Apply the following steps to run a Customers / Suppliers Balance Relink:

1. Ensure all users are logged out of the company.
2. Back up the company.
3. Go to Customers/Sales | Maintenance | Balance Relink.
4. Ensure the options marked below are selected and click the Start button to continue.



5. When done, click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



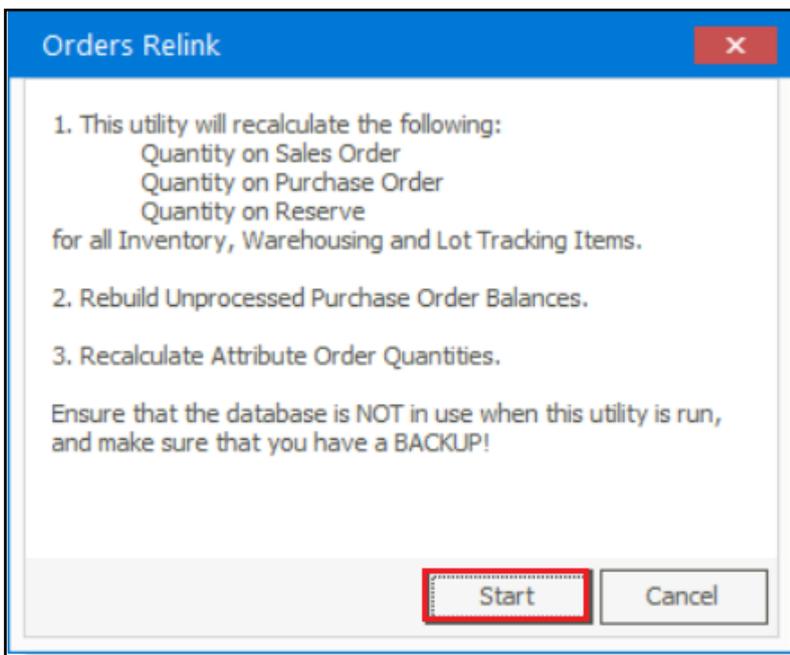
6. Find, expand, and review the log file for the above Balance Relink.
7. Carefully inspect the results of the Balance Relink in the log file. If there are any issues reported below that are not resolved, please consult with your Evolution Business Partner or Sage Evolution Support.



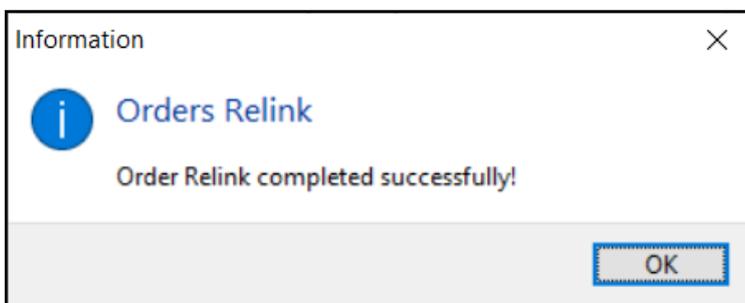
## 4.5 Running an Orders Relink

Apply the following steps to run an Orders Relink:

1. Ensure all users are logged out of the company.
2. Back up the company.
3. Go to Order Entry | Maintenance | Orders Relink.
4. Click the Start button.

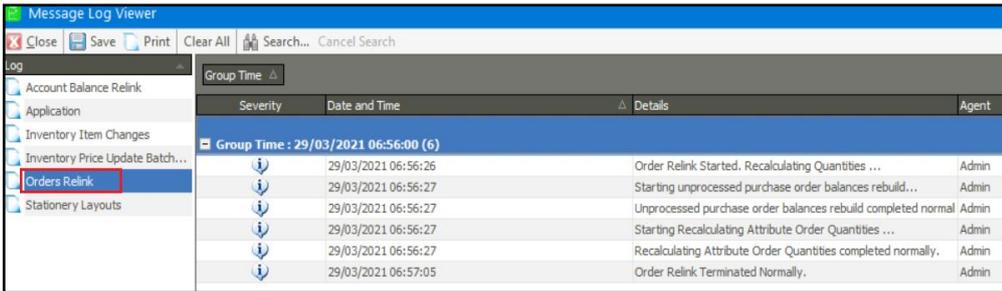


5. When done, click the OK button below.



6. You can now also check the results of the Orders Relink by going to Administration | System Tools | Message Log Viewer.
7. Here, find and open/expand the Orders Relink, and then review the log file.

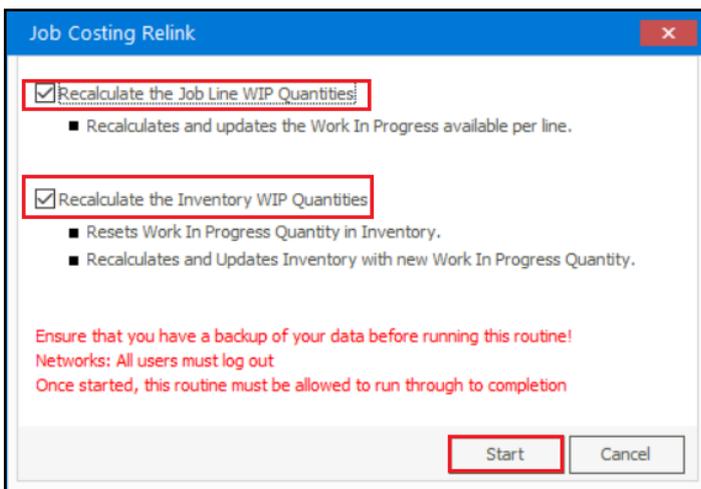
- Carefully inspect the results of the Orders Relink in the log file. If there are any issues reported below that are not resolved, please consult with your Evolution Business Partner or Sage Evolution Support.



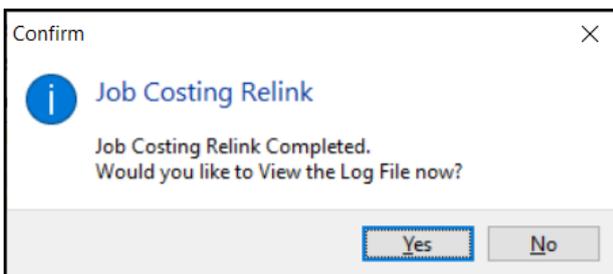
## 4.6 Running a Job Costing Relink

Apply the following steps to run a Job Costing Relink:

- Ensure all users are logged out of the company.
- Back up the company.
- Go to Job Costing | Maintenance | Relink.
- Select the options marked below and click the Start button.



- When done, click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



- In here find and open/expand the relevant Job Coting Orders Relink log file to review the results.
- Carefully inspect the results of the Job Costing Relink in the log file. If there are any issues reported below that are not resolved, please consult with your Evolution Business Partner or Sage Evolution Support.

Severity	Date and Time	Details	Agent
<b>Group Time : 29/03/2021 07:11:00 (6)</b>			
	29/03/2021 07:10:52	Job Costing Relink started.	Admin
	29/03/2021 07:10:52	Job Line Work In Progress Quantities recalculated successfully.	Admin
	29/03/2021 07:10:52	Inventory Work In Progress Quantities reset successfully.	Admin
	29/03/2021 07:10:52	Inventory Work In Progress Quantities recalculated successfully	Admin
	29/03/2021 07:10:52	Recalculated Inventory Work In Progress Attribute Quantities si	Admin
	29/03/2021 07:10:52	Job Costing Relink Terminated normally.	Admin

## 4.7 Running a General Ledger Relink

Apply the following steps to run a General Ledger Relink:

1. Ensure all users are logged out of the company.
2. Back up the company.
3. Go to General Ledger.
4. Ensure all options below are selected and then click the Start button.

General Ledger Relink

Relink Options

- Check Master/Sub Account Flags
- Check Account Types
- Check for Master Account Transactions
- Check for Transaction Dates Out of Bounds
- Check Transaction Date/Period Synchronisation
- Rebuild Account Balance Table
- Check Master/Sub Project Flags
- Check for Master Project Transactions
- Rebuild Project Balance Table
- Check Master/Sub Project Budgets

Start Cancel

5. Click Yes below.

Warning

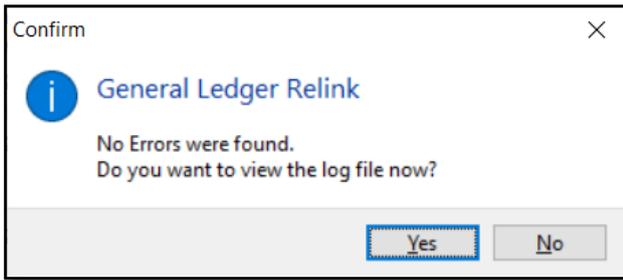
**General Ledger Relink**

As always, it is advisable to have a backup of your data. Please ensure that no other users are accessing this data at this time.

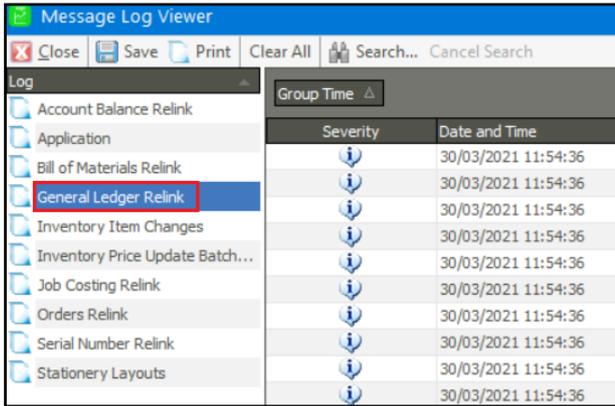
Are you sure you wish to continue?

Yes Cancel

- When done, click Yes on this message to open the log file of the above Relink in the Message Log Viewer.



- In here find and open/expand the relevant GL Relink log file to review the results.



- Carefully inspect the results of the GL Relink in the log file. If there are any issues reported below that are not resolved, please consult with your Evolution Business Partner or Sage Evolution Support.

i	30/03/2021 07:31:50	Setting sub-project levels...	Admin
i	30/03/2021 07:31:50	Setting master project levels...	Admin
i	30/03/2021 07:31:50	Checking master projects exist...	Admin
i	30/03/2021 07:31:50	Master/sub project flag check completed normally.	Admin
i	30/03/2021 07:31:50	Starting master project transaction check...	Admin
i	30/03/2021 07:31:50	Master project transaction check completed normally.	Admin
i	30/03/2021 07:31:50	Starting project balances rebuild...	Admin
i	30/03/2021 07:31:50	Looking for transactions with an invalid project...	Admin
i	30/03/2021 07:31:50	Project balances rebuild completed normally.	Admin
i	30/03/2021 07:31:50	Starting master/sub project budgets check...	Admin
i	30/03/2021 07:31:50	Looking for master project budgets...	Admin
i	30/03/2021 07:31:50	Master/sub project budgets check completed normally.	Admin
i	30/03/2021 07:31:50	General Ledger Relink terminated normally. No Errors were four	Admin

## Section D: Evolution- & Company Setups, -Status and -Content

### 1. Enable Master File Record Filter Start

Especially when your Evolution company has a significant amount of master file records (e.g., Inventory Items, Customers, Suppliers or GL Accounts), you should consider activating the relevant module's **Filter Start** feature.

For example, an Evolution company has over 5,000 stock items, and users observe ISLE issues (Evolution is frustratingly slow, seems to hang, observes latency issues, and or takes a significant amount of time) to accomplish the following actions:

- Simply populate any stock item dropdown on e.g., Invoice, GRV, IBT Issue/Request/Receipt, Manufacturing, etc. (basically any kind of transaction document that involves stock).
- process any such type of documents, and
- view or add/create new master file records on the relevant module's Maintenance screen (e.g., Inventory | Maintenance | Inventory Items grid).

#### Please note:

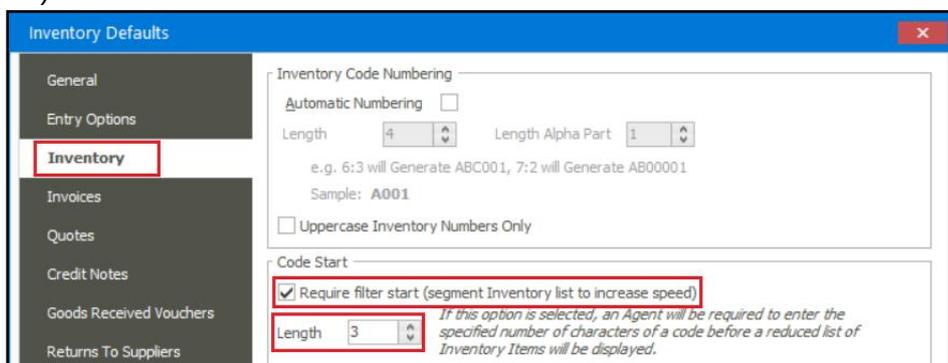
It's difficult to pinpoint which number of records may start to cause the above-mentioned issues, as it all depends on various factors in the company and its environment.

E.g., in one company, having 5000 stock items may cause the above issues, but in another company and/or in a different environment, everything may be fine and efficient without any issues.

Please consider the following example on how to enable Filter Starts and how to continue using the relevant master file on any type of dropdown/selection field. In this case, we'll be referring to the **Inventory** Items' Filter Start setup, but the same principles also apply to all other modules' master records.

#### Phase 1: Setting up Filter Start

1. In the Evolution company, go to Inventory | Maintenance | Inventory Defaults | Inventory.
2. In here select the Require filter start option marked below.
3. Also specify the minimum number of characters a user should enter when searching/finding stock items on any screen where stock items are used in any form (e.g., Invoice, Manufacturing Process, IBT Receipt, etc).



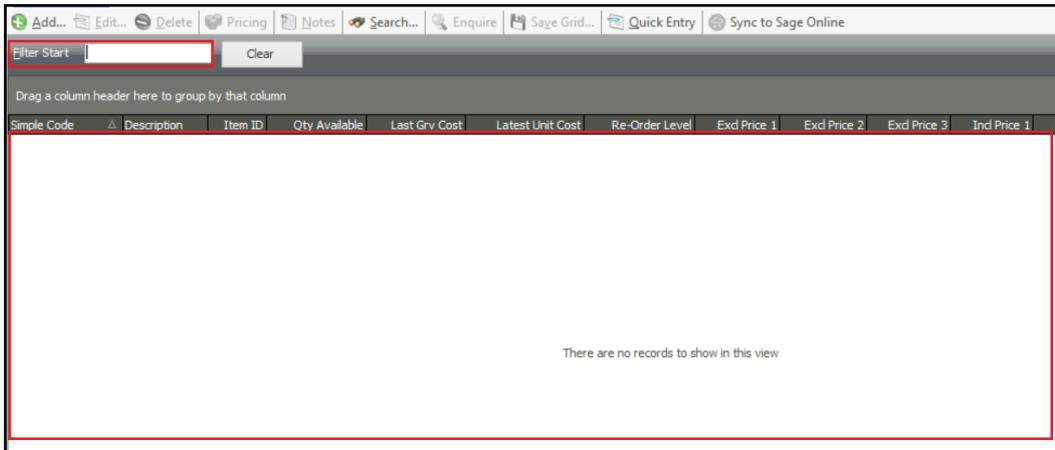
The screenshot shows the 'Inventory Defaults' window with the 'Inventory' tab selected. In the 'Inventory Code Numbering' section, 'Automatic Numbering' is unchecked, 'Length' is 4, and 'Length Alpha Part' is 1. Below this, it says 'e.g. 6:3 will Generate ABC001, 7:2 will Generate AB00001' and 'Sample: A001'. The 'Uppercase Inventory Numbers Only' checkbox is unchecked. In the 'Code Start' section, the 'Require filter start (segment Inventory list to increase speed)' checkbox is checked. Below it, the 'Length' is set to 3. A note states: 'If this option is selected, an Agent will be required to enter the specified number of characters of a code before a reduced list of Inventory Items will be displayed.'

See further below in Phase 2 for more details on how the minimum number of characters is entered.

4. When done, click the OK button at the bottom of the screen to save your changes.

## Phase 2: Searching for Stock Items on Inventory Maintenance grid

1. Go to Inventory Maintenance | Inventory Items.
2. Here, notice that the grid is empty, and the Filter Start field is on the top left of the screen.



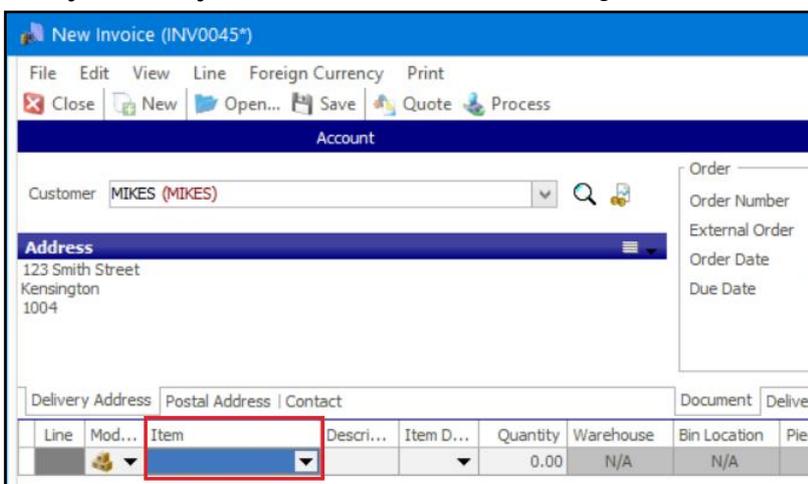
3. Now enter at least the first 3 characters of the specific Item Code (not working on Item Description) on the Filter Start field.
4. Notice how all stock items that match the above entered 'search' criteria on the Filter Start field are now populated below.
5. You can now open/edit the specific stock item you're looking for and continue as normal from this point forward.

The screenshot shows the same interface as before, but the 'Filter Start' field now contains 'DRM'. The grid is populated with the following data:

Simple Code	Description	Item ID	Qty Available	Last Grv Cost	Latest Unit Cost	Re-Order Level
DRM-X1	Dry Wall Mark 1	60	0.00	R0.00	R0.00	0.00
DRM-X2	Dry Wall Mark 2	61	0.00	R0.00	R0.00	0.00
DRM-X3	Dry Wall Mark 3	62	0.00	R0.00	R0.00	0.00
DRM-X4	Dry Wall Mark 4	63	0.00	R0.00	R0.00	0.00
DRM-X5	Dry Wall Mark 5	64	0.00	R0.00	R0.00	0.00

## Phase 3: Searching for Stock Items on any transaction screen

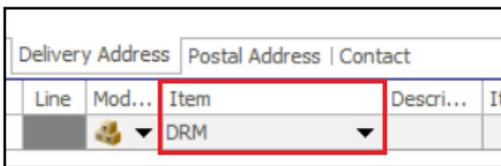
1. On any Inventory related transaction screen, e.g., Invoice, notice the Item field below.



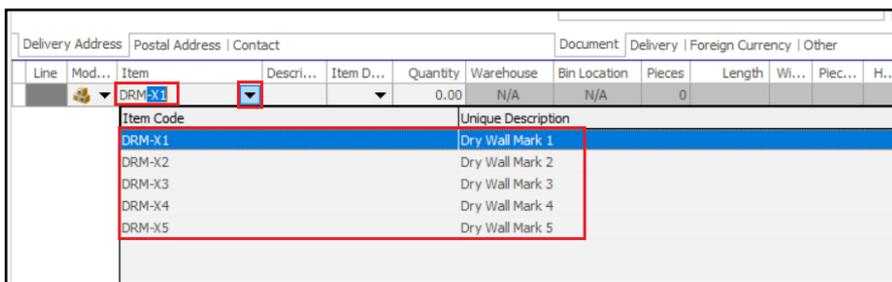
2. If you click on the Item dropdown field, you'll notice the message below.



3. Therefore, enter at least the first 3 characters of the item code you're looking for.
4. Even before you click the dropdown, you'll notice how Evolution is auto populating the Item field.



5. Now click the dropdown button and notice the stock items that match the above entered 'search' criteria.



6. You can now select the specific stock item you're looking for and continue as normal from this point forward.
7. Finally, as mentioned earlier, the same setup and record 'search' principles also apply to Customer-, Supplier- and GL Account records.

First, start in the relevant module's Defaults screen, activate the Filter Start (with the specific number of minimum characters) and then continue on the various modules' Maintenance grids and transactions screens as discussed above.

## 2. Corrupted Evolution company database

Note that any type of company data corruption, even seemingly insignificant, may contribute to any number of errors and ISLE issues.

There can be several symptoms of data corruption, including but not limited to:

- Persistent errors observed by all users across the network working in the same company when performing the same action (e.g. processing, reporting, navigating, etc.) in the same company
- Any kind of ISLE issues observed by all users when performing the same action (e.g. processing, reporting, Customer/Supplier/Inventory Item/GL Enquiring, navigating, etc.) in the same company
- Any kind of record duplications observed – e.g. duplicate stock items on the Inventory Item grid or lookups.
- Wrong/inaccurate information on reports, source documents, grids, Enquiries screens, etc.

Therefore, please consult with your Evolution Business Partner or Sage Evolution Support should you expect to have company data corruption.

**As a good example, consider the following case study:**

The client observed that it took about 15 seconds for each transaction to be displayed on the Customer Enquiry screen, which is obviously unacceptably slow.

Fortunately, it was determined to be caused by a corrupted Accounting Period table (\_etblPeriod). A formal company data fix was then performed, and this ISLE issue was resolved.

**3. A significantly large number- and/or duplicate agent period permission records**

Your company may have a significant number of, and/or duplicate agent period permission records set up in the **Common | Company Details | Accounting Periods** screen, as can also be identified in the **PeriodPermissions** table.

In addition, you may also be unaware of possible **duplicate** agent period permission records.

Having any of the above conditions may lead to detrimental ISLE issues, especially company opening, navigation and processing.

Please note that it's difficult to define 'significant number' in this context as there may always be various factors that can determine when there are simply too many records per unique client environment. However, you should always consider not to 'misuse', or have too many agent-accounting period relationships and manage its use better.

**Getting rid of duplicated agent period permission records:**

A handy script to get rid of duplicate records is below. Run this script after making a new backup and ensuring all users are logged out.

Please note that the solution requires an understanding of how to navigate in MS SQL Management Studio and how to run SQL scripts.

Therefore, please contact either your Evolution business partner (BP) or Evolution Support to get this issue resolved if needed.

```
WHILE EXISTS(  
SELECT AgentID FROM PeriodPermissions GROUP BY AgentID, Period  
HAVING COUNT(*) > 1)  
DELETE PeriodPermissions WHERE idPeriodPermissions IN (SELECT MAX(idPeriodPermissions)  
FROM PeriodPermissions GROUP BY AgentID, Period  
HAVING COUNT(*) > 1)
```

In addition, if you want to get rid of all agent period permission records and recreate the correct ones afterwards, run the following script **after making a new backup and ensuring all users are logged out.**

Truncate table periodpermissions

## 4. Preloading of Forms / Use Server-Mode Grids

### Preloading of Forms

When the Evolution company opens, the opening sequence first goes through the **My Desktop** nodes (e.g., My Calendar, My Incidents, My Dashboard, etc.).

Consider the advice below to prevent this from happening.

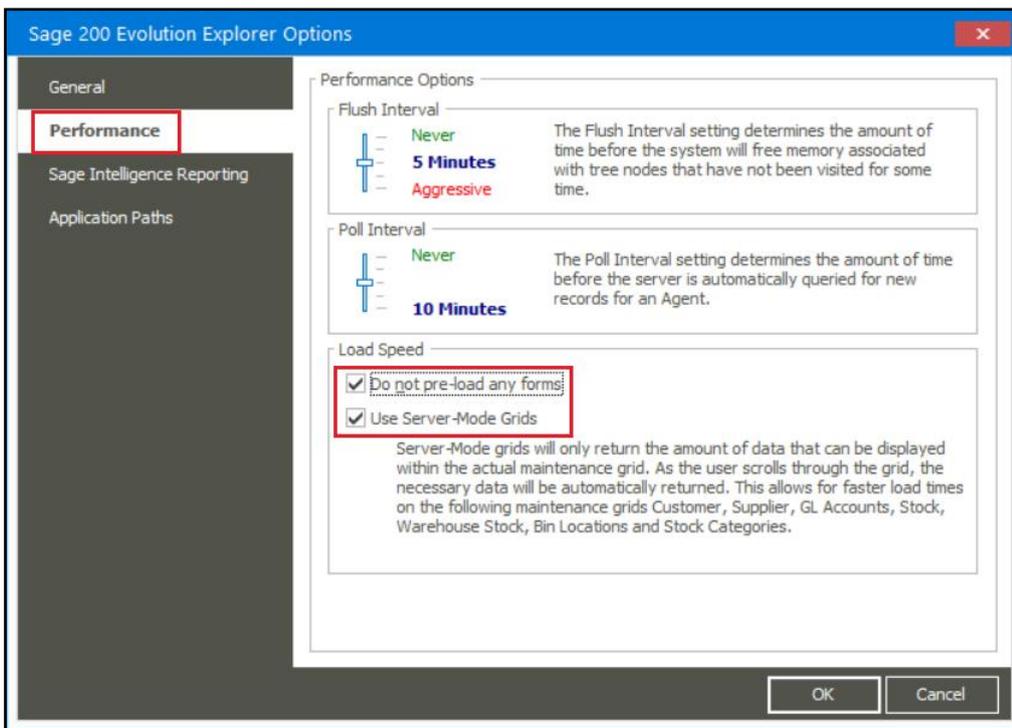
This is especially true if it may take a long time for the Evolution company to be opened

### Improve grids' performance/loading speeds

Evolution allows you to have improved efficiency and faster loading grids in the company (e.g., Inventory, Customers, Suppliers, etc.).

To accomplish both abovementioned benefits, consider applying the steps below:

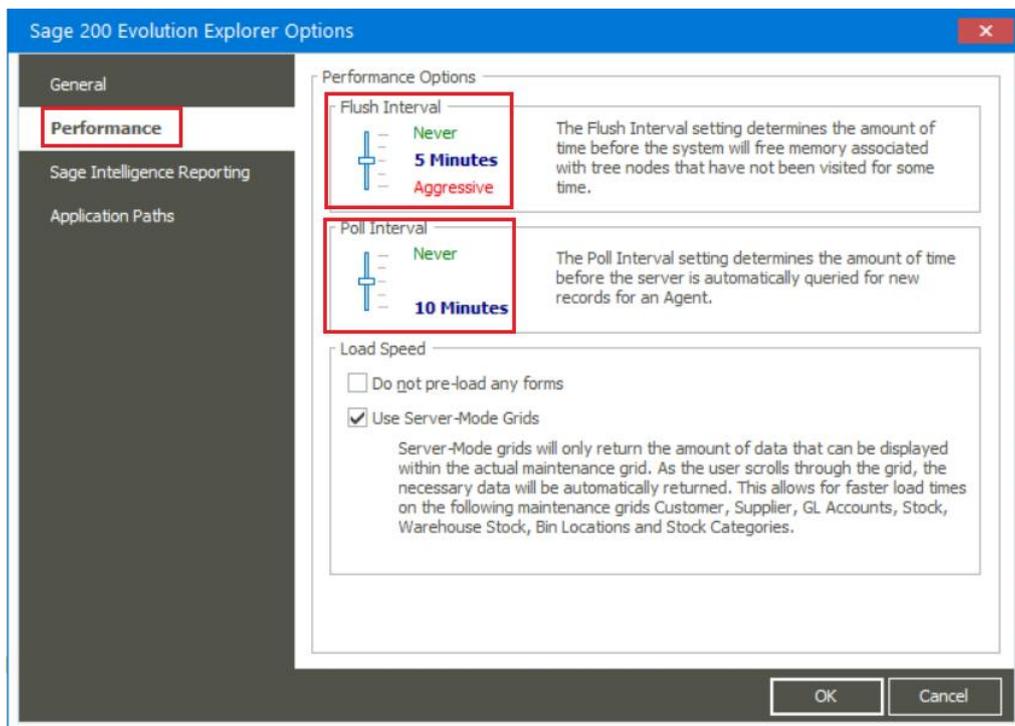
1. Go to Utilities | Explorer Options | Performance.
2. In here select the options marked below per agent per PC (each agent setting it up on his own PC).



## 5. Flush Interval and Poll Interval

Still being on the Utilities | Explorer Options | Performance screen, notice the two setting options marked below, including their detailed descriptions.

As a rule of thumb, keep the default settings as below. However, you may consider carefully testing the outcome on your company's overall performance, by changing them. **Immediately** set the changed setting back to its original position if you detect any deterioration in the company's performance.



## 6. Upgrading to the latest version of Evolution

Sage always strives to improve on its products, and with Evolution, it's no exception.

Therefore, for any type of general ISLE issues observed in processing, enquiring, records maintaining reporting or anywhere else, always consider upgrading to the latest version of Evolution to resolve it.

A good example refers to the frustrating slowness observed when generating the Customer Statement or Suppliers Remittance Advice reports in earlier versions of Evolution (e.g., version 7.20). Fortunately, we have significantly improved Evolution in later versions, and you can now be far more productive when running these (and other) reports.

## 7. Having too many User Defined Fields

Users may observe ISLE issues, especially whenever a Customer, Supplier, GL Account and/or Stock Item record is opened/edited.

This problem may be caused by having a significant number (e.g., more than 50) of User Defined Fields (UDFs) on Customer -, or Supplier, GL Account- and/or Stock Item Maintenance (as relevant) screens.

As an example, in an actual query, a client's company had over 300 UDFs on his Customer Maintenance screen.

Note however: There is no internal limit on the number of UDFs allowed in an Evolution company, but the client should at least be aware of this possible contributing to ISLE issues.

If needed, please consider deleting old, unused UDFs where possible. Also, consider upgrading the Evolution server's / workstation's specifications (chip speed / RAM) if the above issue is observed and (for some reason) you cannot significantly reduce the number of UDFs.

## 8. Including Running Balance column in Enquiries' grids

Especially when you have thousands of records in a certain module's Enquiry grid screen, Evolution may need extra time to populate the grid.

For example, on the Supplier Enquiries screen, the Running Balance column has been included on the grid as can be seen below.

Supplier ALPHA (ALPHA)						
Transactions   Account   Balances   Orders   Annuity Billing   People   Incident History   Inventory Items   Additional Fields   Post Dated Cheques						
Drag a column header here to group by that column						
Date	△ Code	Reference	Debit	Credit	Running Balance	
15/01/2020	SINV	GRV0003		R 460.00	(460.00)	
19/02/2020	SINV	GRV0004		R 575.00	(1 035.00)	
03/03/2020	SINV	GRV0035		R 3 200.00	(4 235.00)	
26/03/2020	SINV	GRV0005		R 17 940.00	(22 175.00)	
21/05/2020	CASH	REF001	R 2 000.00		(20 175.00)	
21/05/2020	CASH	REF001	R 30 000.00		9 825.00	
25/05/2020	SINV	GRV0006		R 23 000.00	(13 175.00)	
29/05/2020	SINV	GRV0001		R 30 000.05	(43 175.05)	
29/05/2020	RTS	RTS0001	R 6 000.01		(37 175.04)	
29/05/2020	SINV	GRV0002		R 39 999.99	(77 175.03)	
29/05/2020	RTS	RTS0002	R 8 000.00		(69 175.03)	
09/06/2020	SINV	GRV0007		R 115 000.00	(184 175.03)	
09/06/2020	RTS	RTS0003	R 4 000.00		(180 175.03)	
12/06/2020	SINV	GRV0008		R 46 000.00	(226 175.03)	
18/06/2020	SINV	GRV0009		R 1 150.00	(227 325.03)	
18/06/2020	RTS	RTS0004	R 575.00		(226 750.03)	
18/06/2020	SINV	GRV0010		R 1 150.00	(227 900.03)	

You should therefore consider removing the Running Balance column when there are hundreds/thousands of transactions, as it may contribute to unnecessary waiting times as the grid is slowly populating.

### Do the following per agent per PC:

1. First, right-click anywhere on the grid and select Customise Grid Columns.

Debit	Credit	Running Balance
	R 460.00	(460.00)
	R 575.00	(1 035.00)
	R 3 200.00	(4 235.00)
	R 17 940.00	(22 175.00)
R 2 000.00		(20 175.00)
R 30 000.00		9 825.00
R 6 000.01		
R 8 000.00		
R 4 000.00		
R 575.00		
R 230.00		

- Transactions
- Details
- Balances
- Orders
- Put On Hold
- Reset Form Defaults
- Grid Options...
- Customise Grid Columns...
- Copy To Excel

- Then drag and drop the **Running Balance** from the column row into the Customisation box.

Debit	Credit	Note
	R460.00	
	R575.00	
	R3 200.00	
	R17 940.00	
R2 000.00		
<b>R30 000.00</b>		
	R23 000.00	
	R30 000.05	
R6 000.01		
	R39 999.99	
R8 000.00		
	R115 000.00	
R4 000.00		
	R46 000.00	
	R1 150.00	
R575.00		
	R1 150.00	
R230.00		
	R5 750.00	
R1 150.00		
	R8 050.00	

**Customization** ✕

Columns

- Project ▲
- Project Active
- Project Description
- Project ID
- Reference 2
- Running Balance
- Settlement Term
- Settlement Term Days |
- Settlement Term Descriptio |
- Settlement Term Disc
- Settlement Term Pay Meth
- Supplier ID ▼

## 9. Retail POS Till Configuration

It may be helpful to improve the printing speed of your Retail POS tills' printers by simply performing a Till Configuration, even if the tills are currently already connected and working.

That means effectively rerunning a Till Configuring to ensure the tills' connection with the Evolution company is refreshed.

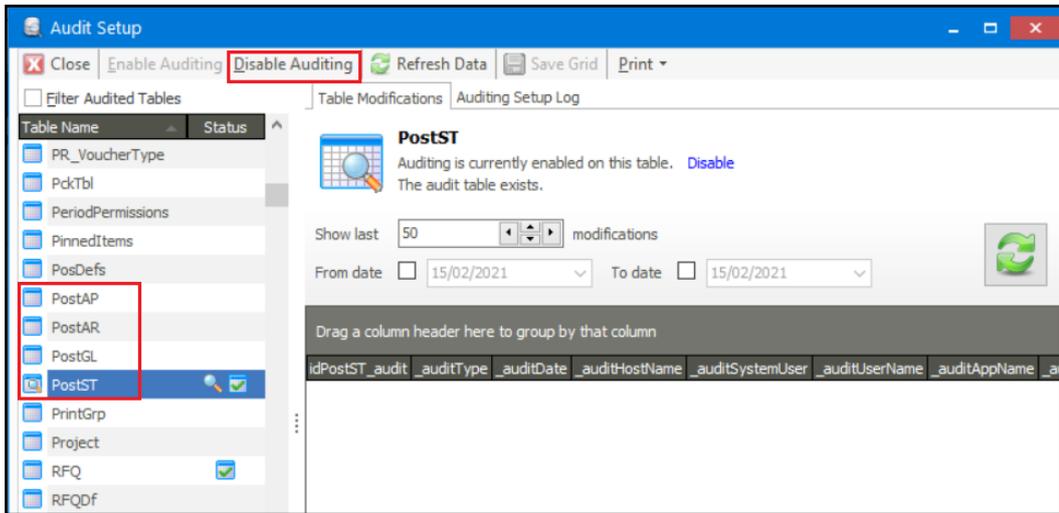
Use the **RetailTillConfig.exe** file in the installed Evolution folder (e.g., C:\Program Files (x86)\Sage Evolution) and continue in the normal way in applying the Till Configuration.

## 10. Database Audit Setup

It should be considered to deactivate the auditing on some tables. The more tables being audited, as well as the nature of certain audited tables, may be causing your company to experience ISLE issues.

Consider deactivating the Database Audit Setup, especially on certain posting tables such as **postgl**, **postar**, **postap** and **postst** if their auditing is no longer relevant. Also note that running auditing on any table is supposed to be of a temporary nature to track/audit agent activity over a certain period, and is not supposed to be permanent.

The above-mentioned main posting tables are constantly updated when processing occurs on the company, resulting in a lot of database update traffic, and thus putting pressure on the server's memory and processing resources.



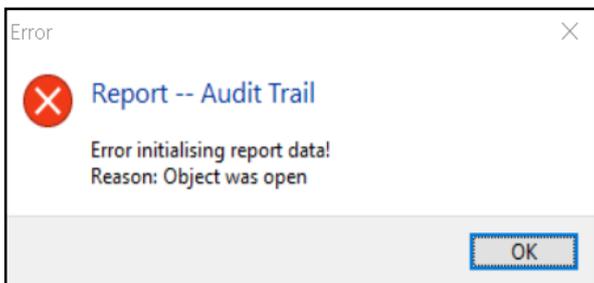
## 11. Significant number of Accounting Years and General Ledger Transaction history volume

When you don't regularly run a Purge First Year routine, General Ledger transaction history accumulates over the years.

Therefore, especially in companies with a high volume of transactions, you may eventually have hundreds of thousands or a couple of millions of transactions residing in the main GL posting table (POSTGL).

This could lead to critical ISLE issues when running any kind of GL related reports, e.g. Trial Balance, Balance Sheet, Account Transactions, Audit Trail, etc. or even with any transaction processing. This is due to the POSTGL (and other GL related) table taking longer to be updated with the new transaction.

In addition, error messages such as the below can also be observed when running GL related reports, e.g. Audit Trail, GL Account Transactions report, etc.



Therefore, open the relevant (for Branch Accounting- or non-Branch Accounting type companies) link below for a detailed Evolution Year-End guide.

These guides also include how to run a Purge First Year routine: Deleting all GL account transaction history (as coming from all modules' transactions) in the specific year being purged.

### A) Sage Evolution Year End Guide for **NON-Branch Accounting** companies

#### URL

<https://za-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=210216192624610&page=1&position=1&q=Sage%20Evolution%20Year%20End%20Guide%20for%20NON-Branch%20Accounting%20companies>

## B) Evolution Year End Guide for Branch Accounting companies

### URL

<https://za-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=210216190659930&page=1&position=2&q=Sage%20Evolution%20Year%20End%20Guide%20for%20Branch%20Accounting%20companies>

Also, consider the following article:

### General Ledger: When running a Purge First Year routine as part of the financial year end is required or not required

This article also discussed the use and role of the General Ledger Archive utility that can also help to increase the speeds of running GL related reports.

### URL

<https://za-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200310052234553&page=1&position=1&q=General%20Ledger%3A%20When%20running%20a%20Purge%20First%20Year%20routine%20as%20part%20of%20the%20financial%20year%20end%20is%20required%20or%20not%20required>

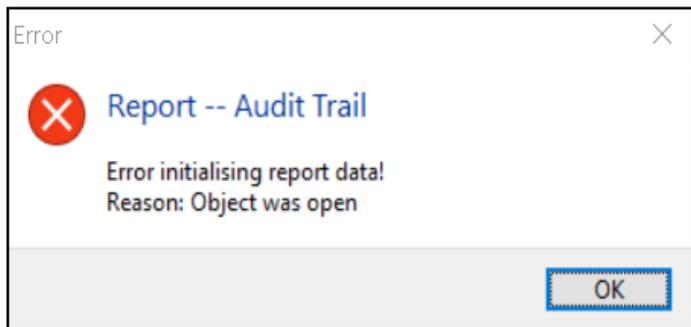
### Please also consider the following scenario that prevents transactions from being purged

- All **unreconciled** bank (GL accounts with an account type of Cash and Cash Equivalents) account transactions WILL NOT BE PURGED when you run the Purge First Year routine. This means that there could still be a certain (potentially massive) amount of transactions for Cash and Cash Equivalents GL accounts, even for purged years, as per the example below.

Year	Year Description	Start Date	Archived	Purged
1	Year 1	2012/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Year 2	2013/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Year 3	2014/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Year 4	2015/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Year 5	2016/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Year 6	2017/01/01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Year 7	2018/01/01	<input type="checkbox"/>	<input type="checkbox"/>
8	Year 8	2019/01/01	<input type="checkbox"/>	<input type="checkbox"/>
9	Year 9	2020/01/01	<input type="checkbox"/>	<input type="checkbox"/>
10	Year 10	2021/01/01	<input type="checkbox"/>	<input type="checkbox"/>

- The existence of especially a huge number (e.g., hundreds of thousands, into millions) of these transactions may contribute towards ISLE issues and especially the type of error below.
- This is due to having simply JUST TOO MANY transactions on the POSTGL table that even a powerful server can't handle when running GL related reports, e.g., Audit Trial report.

The result may be the error message below (this is just another way of informing you it can't find enough memory resources to run the report).



- The only way to get rid of them is to do the following:
  - Consult with your Chief Financial Officer (or responsible financial officer) to confirm which accounting years'/periods' bank account transactions can/should be reconciled in the General Ledger | Transactions | Bank Reconciliation screen.
  - Reconcile the identified bank account (Cash and Cash Equivalent account) transactions.
  - Now run another Purge First Year routine (after first making a company backup and ensuring all other users logged out of the company).
  - If you now check the GL Enquiries for those GL Bank account/s, you'll notice that the above reconciled transactions have been removed (deleted from the company database) from all the previously purged years and are no longer available.
  - As a result, your ISLE issues may now be resolved when running a GL related report, e.g., Audit Trial.

**Please also note the following:**

**You may have reached a dilemma as explained in the following scenario:**

- Your company's current accounting year is January to December 2021.
- So far, all Accounting Years until 2019 have already been purged earlier, but that was before reconciling the bank account transactions.
- You have then reconciled all bank account transactions from the start (e.g., 2015) to 2020.
- But if you now run another Purge First Year, it means you will lose all GL account transactions for 2020 as well, which may be undesirable/unwanted at this stage.
- That is because you still need to run your financial reporting for 2020 as well (for normal business operations, year-end, and various other financial reporting reasons).

**To resolve this dilemma, consider the following advice:**

1. Back up your live company.
2. Restore the backup as a new company database with a new name e.g., AAA
3. Now perform the Purge First Year in company AAA (after ensuring all relevant bank accounts are reconciled).
4. You will at least now be able to run GL related reports in this company as required.
5. Back in the live company, continue working and processing as normal, except for reporting as you may observe the ISLE issues and the above error.

## 12. Significant volume of Customer and/or Supplier transaction history

As with the GL module, having significant numbers of customer and/or supplier transactions may also contribute to ISLE issues when processing and running relevant reports (e.g., Age Analysis, Statements, Remittance Advice, Transactions report, etc.).

Please note it's not easy to determine which number of transactions is considered too high, and that may cause ISLE issues as it all depends on your local processing power, number of users, and other environmental factors.

However, at some stage, you may have to consider running a Purge Transactions routine in the Customers and/or Suppliers module (as relevant). This is because there may eventually be hundreds of thousands (perhaps millions) of transactions.

Also note that when transactions are purged, they are deleted from the following tables:

- Customer transactions: postar
- Supplier transactions: postap

These steps explain how to purge Customer Transactions (with the same principles also applying to purging supplier transactions):

1. Plan for a date/time when all other users will be logged out of the company.
2. Ensure the range of transactions to be purged is fully allocated (e.g., all invoices/debits to be allocated against payments, credit notes, etc.). This also implies the following should be adhered to:

If an invoice of R5000 is fully allocated to a R7 000 payment transaction, the remaining R2 000 payment portion should also be fully allocated to another invoice/s.

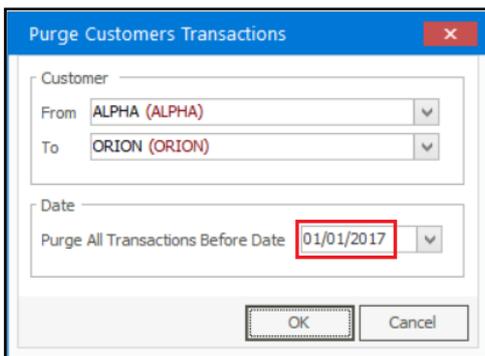
3. To check if transactions are allocated or not, do the following:
  - a. Go to Customers | Reports | Allocations Report
  - b. Set up the report's filters as below and run the report.
    - The **From Date** is from the earliest date for which old transactions exist. The **To Date** range option below is the date **to which** you want to purge transactions.
    - Select only the **Debits** and **Credits** options below.

- c. The results should only display the unallocated transactions as evident in the Outstanding column below.

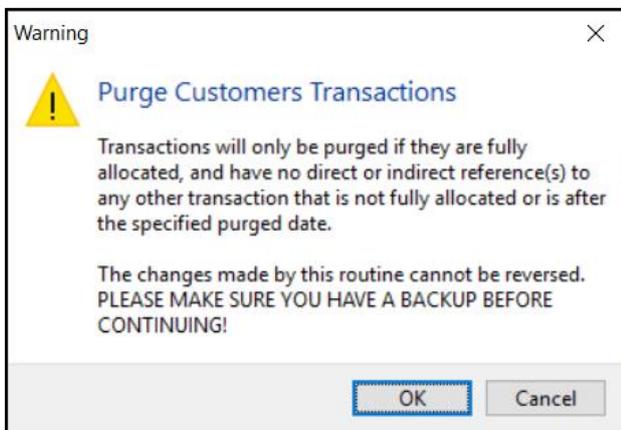
Accounts Receivable Allocations								Page 1 of 2				
Customer: ALPHA						Date: 10/02/2021						
Name: ALPHA												
Date	Age	Code	Reference	Description	Debit	Credit	Outstanding	Total				
				Previous Allocations	57 607 950.00	8 960.00		57 598 990.00				
27/11/2020	60 Days	INV	INV0040	Invoice	101 844.00	0.00	101 844.00	57 700 834.00				
15/01/2021	Current	INV	INV0044	Invoice	1 150.00	0.00	1 150.00	57 701 984.00				
26/01/2021	Current	INV	INV0045	Sales Order	345.00	0.00	345.00	57 702 329.00				
26/01/2021	Current	INV	INV0046	Sales Order	345.00	0.00	345.00	57 702 674.00				
					Current	30 Days	60 Days	90 Days	120 Days	150 Days	180 Days	Amount Due
					1 840.00	0.00	101 844.00	56 934 020.00	0.00	20 500.00	644 470.00	57 702 674.00

Document Version 2025.01

- d. That means you should first fully allocate the above transactions before running the transactions purge.
  - e. Note that no UNALLOCATED transactions (both Debit and Credit) will be purged as per Evolution design. This is to **prevent customers' balances** from changing after the purge has been run.
  - f. Therefore, first ensure there are no records on the above report before running the purge to ensure that those transactions are actually purged.
4. When the above has been done, back up the company and ensure there are no users logged onto the company.
  5. Go to Customers | Maintenance | Purge Transactions.
  6. In here, select the complete list of customers in the From and To fields and the date: transactions should be purged before this date. When done, click the OK button to start the purge.



7. Click OK on this message and wait until the urge is completed.

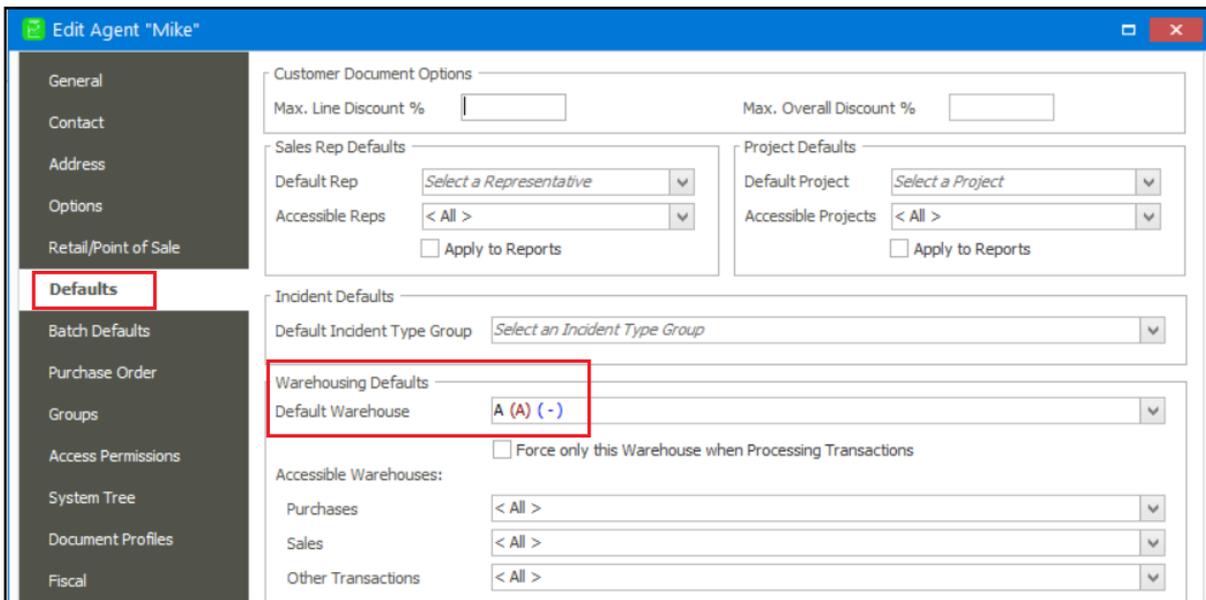


### 13. Point of Sale (POS) and Retail POS Speed improvements

As mentioned above, a significant number of customer transactions may lead to ISLE issues. Especially in the POS and Retail PSO modules, the CASH customer usually accumulates a massive amount of transactions over a relatively short period of time.

Therefore, consider regularly purging especially the CASH customer's transactions, e.g., once a month. Else, if you want to keep the CASH customer's transactions for a longer period (e.g., 1 year), then simply regularly create a new CASH customer to be used by the various till operators.

Also, always specify a Default Warehouse for each agent that will act as POS or Retail POS till operators on the Administration | Agent Administration | Agents | Defaults screen.



## 14. Making use of a new SageCommon database

It has been noted that in some cases creating and linking a new SageCommon database to your Evolution company database/s may lead to improved speed and performance levels various places/functions in the company.

This is also true when processing source documents as a document layout is then recalled, as well as printing any report (that uses a report layout, both residing in the SageCommon database).

When a new SageCommon database is to be created remember the following:

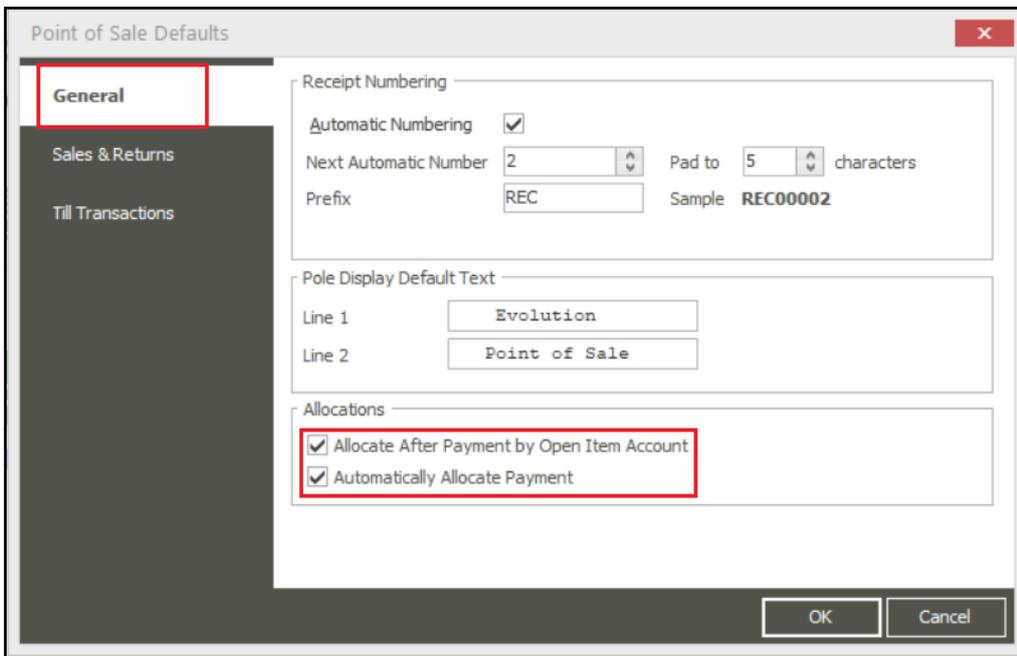
- First export all your customized document and report layouts.
- After the new SageCommon is created, obtain a new registration code.
- Finally, ensure the new Common database is linked to all Evolution companies and separately on all workstations.

## 15. Force Allocations on Point of Sales transactions

Consider forcing the allocations of Point of Sale (if you are using this module) transactions as doing this usually leads to higher general processing, reporting, and printing speed efficiencies in your company.

**To accomplish this, do the following:**

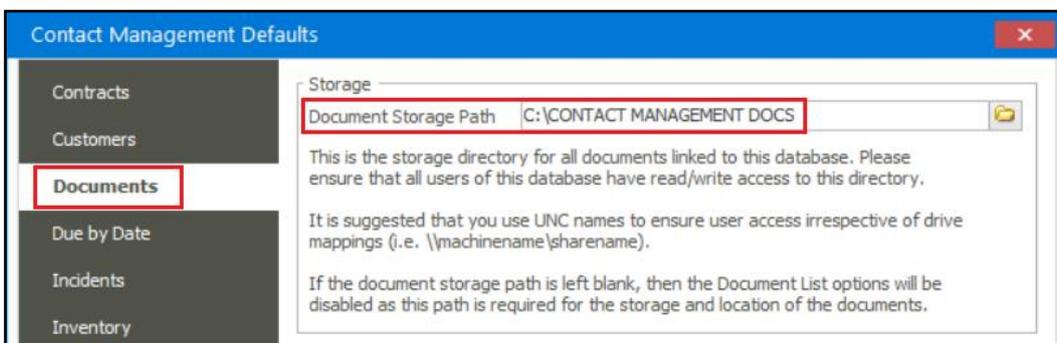
1. Go to Point of Sales | Maintenance | Defaults.
2. On the General tab, select the two options marked below and click the OK button to save your changes.



## 16. Slow document linking on Contact Management incidents

Apply the following steps to improve the speed of observing slow document linking to Contact Management incidents.

1. First, back up the Document repository folder as specified on the Contact Management | Maintenance | Defaults | Documents tab.



2. Now cut the oldest files (let's say 3000 at a time) out of this folder and paste them into a separate folder to reduce the actual size of this folder.
3. Regularly test the speed of document linking in between cutting files out of the Document folder until there are significant speed improvements in document linking.
4. When required, the client can still get hold of the old files that were cut out of the Documents repository folder by copying them back into the folder.

## 17. Having unused journal and cashbook batches

You may have a significant number of old, used General Ledger-, Customers-, Suppliers-, Inventory Journal- and/or Cashbook batches. Having these may also lead to ISLE issues especially when processing journal batches.

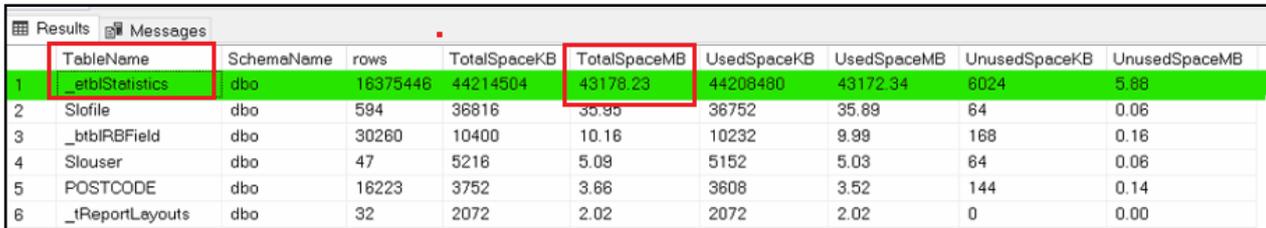
Therefore, try to reuse the same journal batch where possible and/or delete old journal batches.

Document Version 2025.01

## 18. SageCommon / EvolutionCommon database has significantly grown in size, especially the \_etblStatistics table within the Common database

You may observe that the SageCommon / EvolutionCommon database has significantly grown in size (very large), especially the \_etblStatistics table within the Common DB.

In a recent query, a client noted that this table has grown to a massive 43 GB in size when running a SQL script on the Common database.



	TableName	SchemaName	rows	TotalSpaceKB	TotalSpaceMB	UsedSpaceKB	UsedSpaceMB	UnusedSpaceKB	UnusedSpaceMB
1	_etblStatistics	dbo	16375448	44214504	43178.23	44208480	43172.34	6024	5.88
2	Slofile	dbo	594	36816	35.95	36752	35.89	64	0.06
3	_btblRBField	dbo	30260	10400	10.16	10232	9.99	168	0.16
4	Slouser	dbo	47	5216	5.09	5152	5.03	64	0.06
5	POSTCODE	dbo	16223	3752	3.66	3608	3.52	144	0.14
6	_tReportLayouts	dbo	32	2072	2.02	2072	2.02	0	0.00

### Details / Solution

Please note that the information provided below is intended for a qualified SQL Database Administrator (DBA) who should understand the following facts provided below:

#### A. First, note the purpose of this table:

The \_etblStatistics table stores statistics that are essential for the query optimizer to prepare an optimized and cost-effective execution plan.

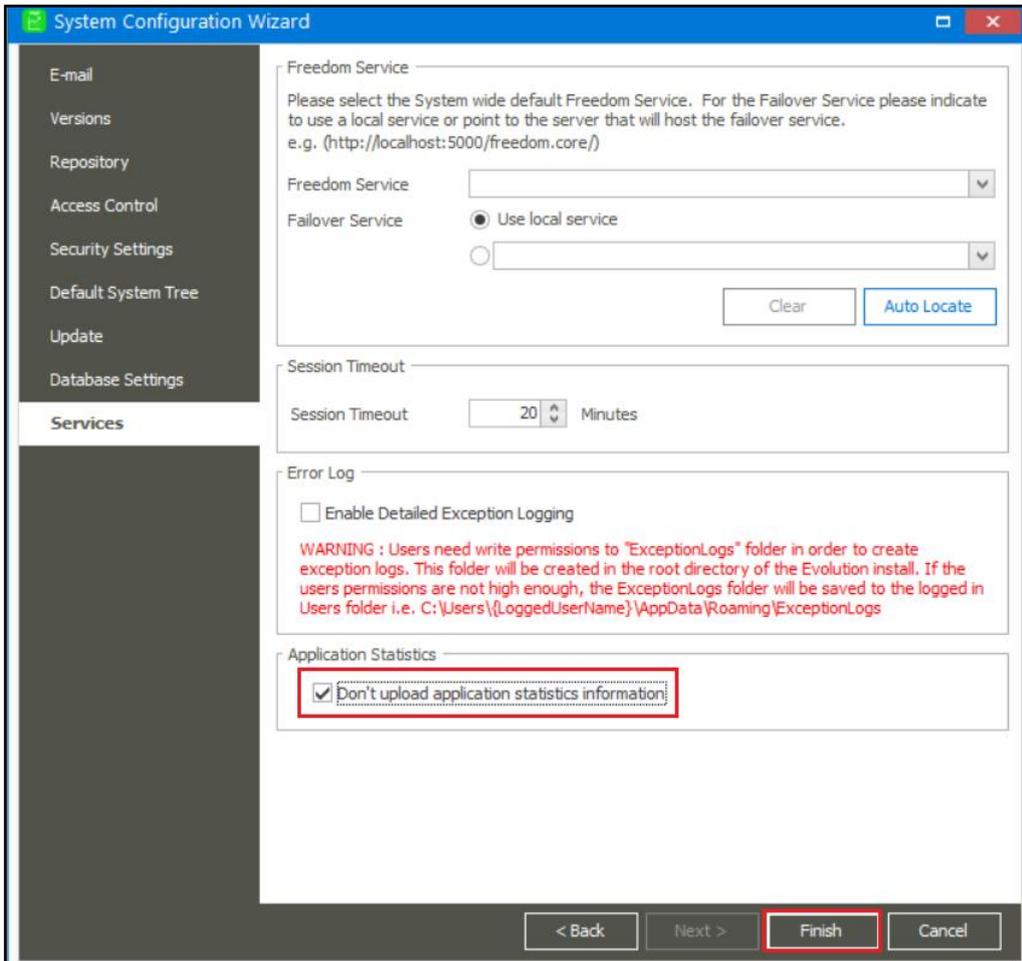
These statistics provide a distribution of column values to the query optimizer, and it helps SQL Server to estimate the number of rows (also known as cardinality).

In short, the content of the \_etblStatistics table can be analysed by the DBA as part of investigating improving the efficiency of the Evolution company database (among other reasons).

#### B. Activating / Deactivating the generation of content in the \_etblStatistics table

To create continue content creation in the \_etblStatistics table, do the following:

1. Login to the company with agent Admin (or an agent linked to the Administrator agent group).
2. Go to Administration | System Configuration | System Wizard | Services tab
3. In here select the option marked below to deactivate the generation of new content in the \_etblStatistics table. By default, this option is normally unselected which means the \_etblStatistics table is being daily updated with new content.
4. If your DBA doesn't need to analyse the content of the \_etblStatistics table as mentioned above, it makes sense to select the option below.
5. When done, select the Finish button below, close, and then re-open the company to continue working in the company.



6. In addition, you should also notice that general processing and reporting speeds should be improved in the Evolution company afterward.

### C. Removing current records in the `_etblStatistics` table

1. Back up the SageCommon / Evolution Common database and ensure all users are logged out of all companies.
2. Run a truncating type of SQL script on the `_etblStatistics` table to clear its contents.

## 19. Upgrading to the latest Evolution versions and builds

We continuously strive to fix several types of Sage Evolution slowness and hanging issues across various modules of Evolution.

As an example, consider the following Manufacturing issue that was logged for Evolution version 10.1.2

Extreme system slowness when selecting Bill Master Items on the Manufacturing screen

When the client upgraded to Evolution version 10.1.3 this matter was resolved

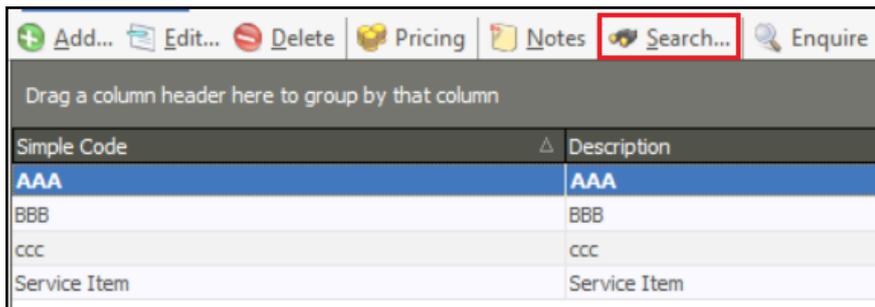
Therefore, if you observe any kind of slowness or hanging issues in any module in your Evolution company, please do the following:

1. Create a brand-new DEMO company using the same version and build as your current live company.
2. Capture a few test records and then try to simulate the same kind of setup as in your live company.
3. Carefully test if your original slowness issues in this test company
4. If you can recreate it, please log a query with Sage Evolution Support using the link below.

In some cases, your slowness/hanging issue may be due to a software bug that could be resolved by an Evolution version/build upgrade.

## 20. Standard grid Search feature is slow to find records in any module

You may observe that the standard grid Search feature may be slow to find records, as used in various modules.



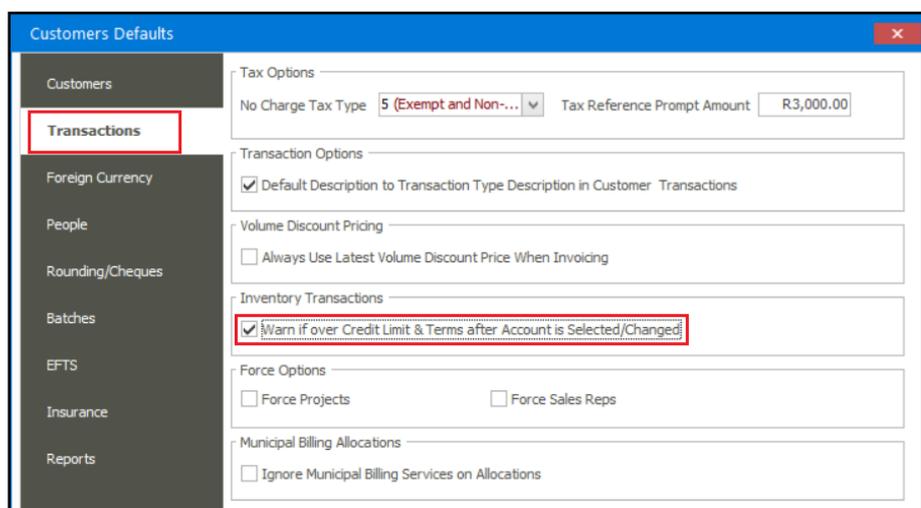
If this is the case, please consider a detailed article as opened in the following link:

<https://za->

[kb.sage.com/portal/app/portlets/results/viewSolution.jsp?solutionid=200423125352503&page=1&position=1&q=Company%20Navigation-%2C%20Connection%2C%20Display-%2C%20Performance-%2C%20Slowness%2Fhanging-%20%26%20Other%20issues%3A%20Standard%20grid%20Search%20feature%20very%20slow%20to%20find%20records%20in%20any%20module](https://kb.sage.com/portal/app/portlets/results/viewSolution.jsp?solutionid=200423125352503&page=1&position=1&q=Company%20Navigation-%2C%20Connection%2C%20Display-%2C%20Performance-%2C%20Slowness%2Fhanging-%20%26%20Other%20issues%3A%20Standard%20grid%20Search%20feature%20very%20slow%20to%20find%20records%20in%20any%20module)

## 21. Activating Customer Credit Limit and Terms Warning

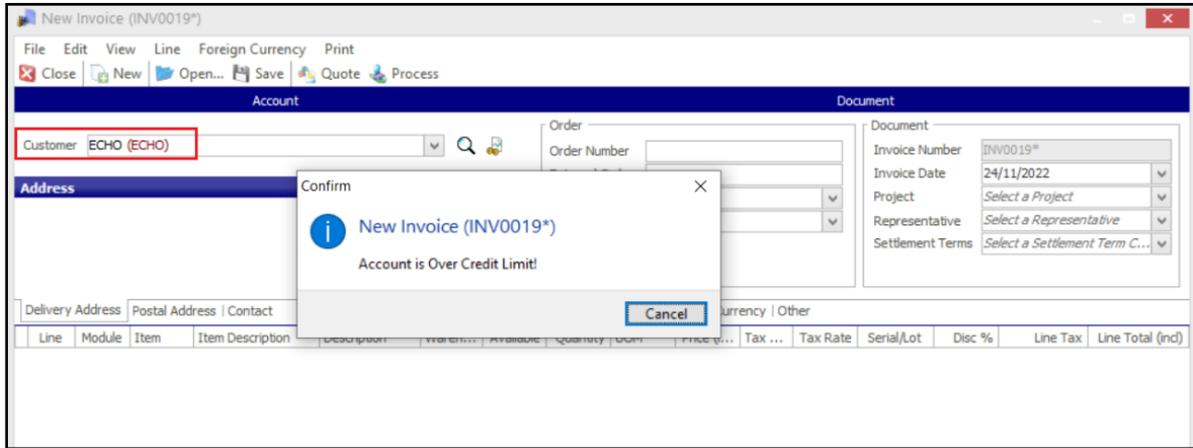
1. Go to Customers | Maintenance | Defaults.
2. On the Transactions tab, activate the option marked below.



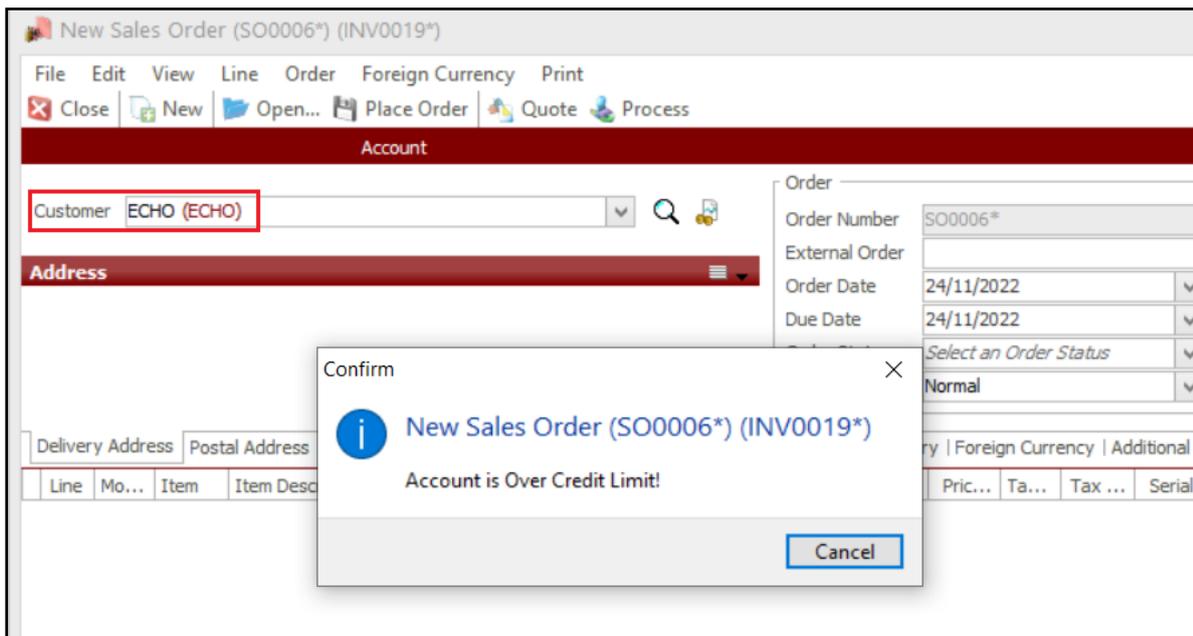
Document Version 2025.01

**To explain further, consider the following scenario:**

1. In this case, customer ECHO has a Credit Limit of R1000 as set up on the Customer Maintenance screen.
2. Customer ECHO's current Outstanding Balance is R30 000.00
3. Open a new Inventory Invoice and select customer ECHO.
4. The moment you tab away from the newly selected customer, note the following message that is displayed.



5. The same message is also displayed on a Sales Order screen.



Therefore, having the above ability may save you unnecessary time and effort to capture a new Invoice if you know upfront that the customer has indeed exceeded his credit limit.

In addition, this should also prevent embarrassing situations.

For instance, **only after** confirming the fulfilment and processing of a new order for a specific customer, do you realise the customer has actually exceeded his credit limit. You therefore have to contact and advise him about the order being cancelled.

## 22. Evolution Desktop Shortcut change for RDP Server logons

Open this link for an article that discusses how to improve the company opening speed of an Evolution company on an RDP (Terminal Server) server:

<https://za->

[## 23. Uninstall unused and unregistered Evolution add-on modules](https://za-<u>kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=250314144129773&page=1&position=0&q=250314144129773</u></a></p></div><div data-bbox=)

It's recommended to uninstall all unused and unregistered Evolution add-on modules.

**Therefore, do the following:**

1. Compare the modules registered under the Help | About menu with the list of modules in the local PC's Control Panel | Programs screen.
2. Uninstall all the unused and unregistered add-on modules.
3. Repeat the same steps on all Evolution workstations.
4. You may notice an improvement in the Evolution company opening speed afterward.

## Section E: Hanging or Slow previewing/printing of reports/documents

First, note that you may already observe faster, improved previewing/printing performances when the advice so far covered in this guide has been considered and applied in your company and environment.

However, in addition, the advice below should also be considered to increase your printing efficiency:

### 1. Printing customised report/source document layouts

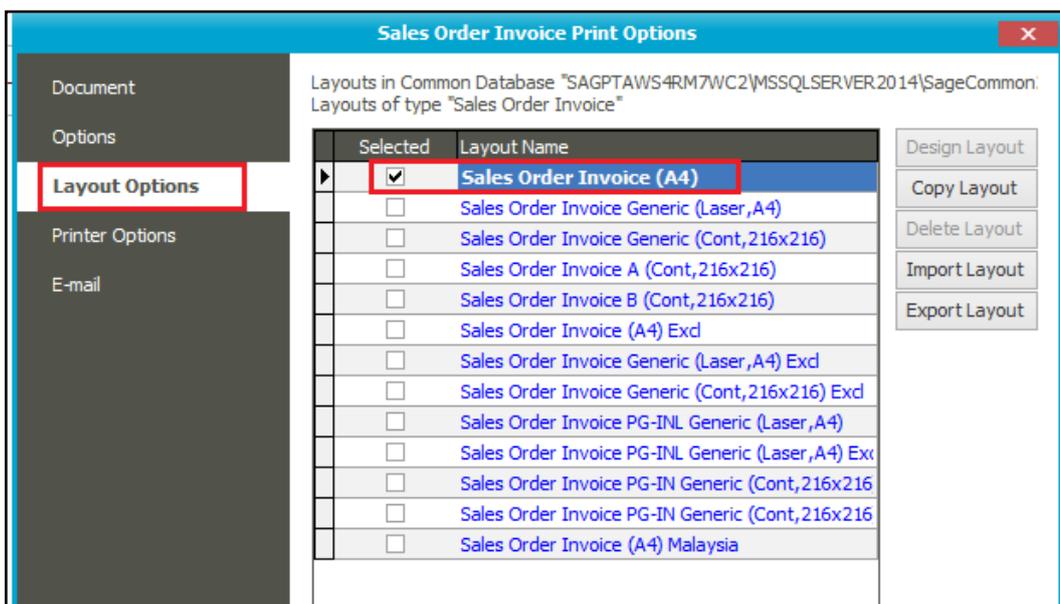
You may observe that the printing preview of a certain report or source document, e.g., Invoice, GRV, PO, etc., takes a significant time (e.g., 20-60 seconds) to display after it has been processed.

The following steps explain how to resolve this matter:

1. Open the relevant source document transaction screen, e.g. SO Invoice.
2. Go to **Print | Print Options | Print Options Sales Order Invoice** (as per this example).



3. For source documents the Layout Options page should now open. For slow running reports, also go to the Layout Options screen.
4. In here always select the standard layout = the top listed layout (regardless of the report or source document type), as can be seen below if the user has been using a customised layout so far.
5. Close the screen when done.



6. Open/recall an archived source document e.g., an invoice, and re-print it, or test printing on a new invoice. Also, test running the same type of report for which the standard layout has been selected above.

7. You may observe that the printing preview speed should now be much faster than earlier observed.
8. If speed improvements are observed, consider having your customised layout amended or even re-customised from the start.
9. Your current customised layout may include one or more fields or any number of setup issues that are causing the delayed printing preview.
10. Also note that slow previewing/printing speeds may especially be possible on certain layouts directly after upgrading the company from an earlier Evolution version. Then a re-customization is required in this case.

## **2. Company database's LDF and MDF files located on two different drives**

Refer to **2. Company database's LDF and MDF files located on the same drive** above (page 12).

Having your company database MDF and LDF files in different locations / different drives is the recommended setup to prevent/improve slow reporting/source document previewing/printing issues.

## **3. Printer hardware, drivers, and port considerations**

Slow printing may, in many cases, be due to some kind of hardware or printing port-related issues. For instance, consider changing to using USB port printers as opposed to the older, classical COM port printers.

Also, ensure your printer's drivers are up to date to ensure optimum efficiencies/speeds. Also, consider applying a printer reset procedure (switching off, disconnecting, and reconnecting the printer) to clear the printer's unused memory/cache.

This procedure depends on the specific printer's make and model, and you should research the printer's online resources on how to accomplish this.

Finally, it may just be time to purchase a new printer if it seems very old and clearly outdated.

## **4. Known software bug: Slow previewing/printing of Age Analysis report**

In some cases, ISLE issues about the previewing/printing of reports may be due to a known software bug

For example, you may observe that the Customer's / Supplier Age Analysis reports, especially Evolution version 10.1 take several hours to complete, which is unacceptable and frustrating. This specific software bug has been logged with reference number IS-13748

This ISLE issue may be especially relevant if the option marked below is selected.

The screenshot shows a software dialog box titled "Report -- Customers Age Analysis". On the left is a sidebar with "Report", "Layout Options", "Printer Options", and "E-mail". The main area is divided into several sections:

- Customers:** Includes dropdowns for "From" and "To" (both set to "Select a Customer"), "Groups", "Areas", "Sales Reps", "Ageing Periods", and "Foreign Currency" (all set to "< All >"). There are also checkboxes for "Print On Hold Customers" and "Print Cash Customers", both of which are checked.
- Options:** Contains radio buttons for "All Balances", "Exclude Zero Balances" (selected), "Exclude Balances Less Than", and "Credit Balances Only". It also has checkboxes for "Collection Analysis (Over Terms)", "Over Credit Limit", "Balances Older Than" (with a sub-menu set to "Age 1"), "Allocate Unallocated Credits to Oldest" (checked and highlighted with a red box), "Show Credits after Report Date", "Only Foreign Currency Accounts in Foreign", and "Age Per Service".
- Report:** Includes a "Report Date" dropdown (set to "08/03/2021"), "Group by" (set to "[None]"), "Primary Sort" (set to "Customer Name"), "Secondary Sort" (set to "Customer"), "Display Format" (set to "Customer (Name)"), and "Age All By" (set to "Select an Ageing Pe...").
- Transactions:** Includes checkboxes for "Print Transactions" and "Include Zero Outstanding", both of which are unchecked.

At the bottom, there are buttons for "E-mail", "Print", "Preview", and "Close", along with a "Default" checkbox.

Fortunately, this matter has been resolved in Evolution versions after 10.1. Therefore, upgrading your Evolution package should resolve the above issue.

Finally, please always contact Evolution Support to enquire if a certain report with ISLE issues may perhaps be due to a known software bug.

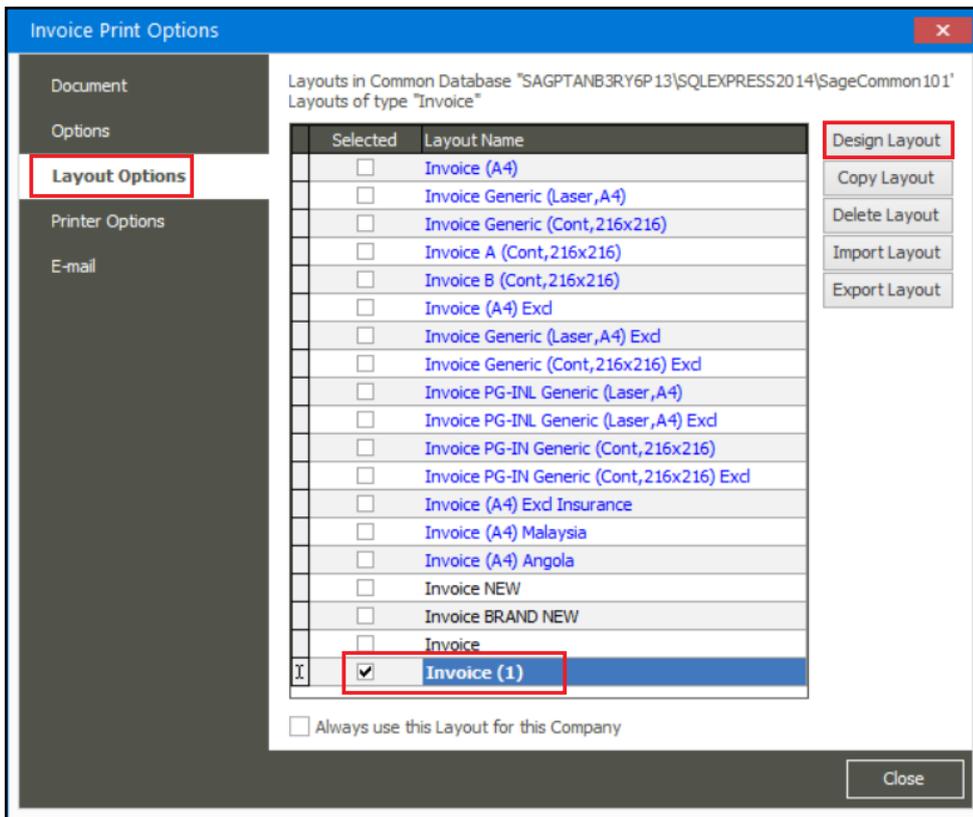
## 5. Making use of a new SageCommon database

As mentioned above in **Section 3: Section D: Company Setups, -Status and -Content | 12. Making use of a new SageCommon database**, on how to improve your document and report previewing performance.

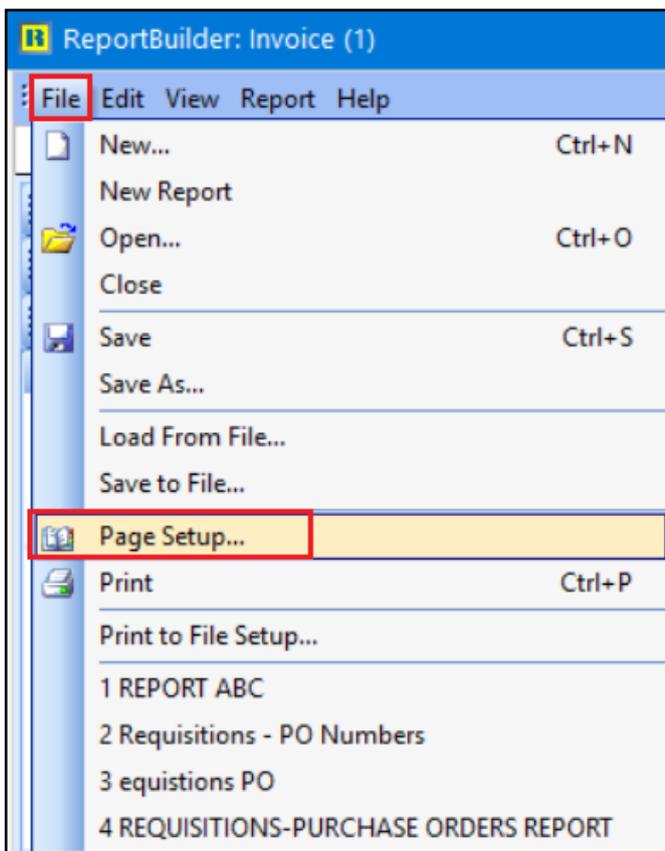
## 6. Specify the Printer Driver on each layout

You should notice significant previewing and printing speed improvements if you do the following:

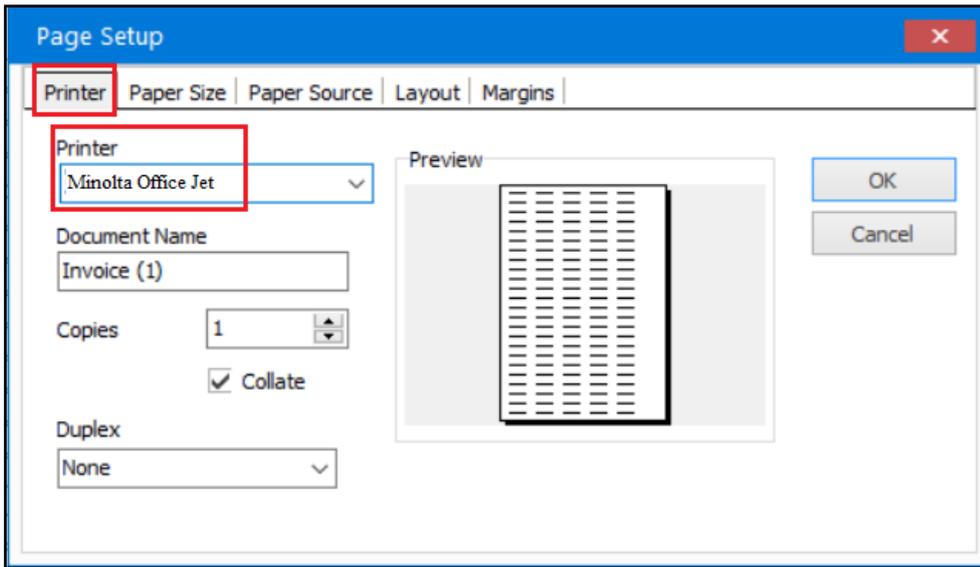
1. Go to the Layout Options page of the first source document/report.
2. In here select your relevant customised layout in use and click the Design Layout button as can be seen below.



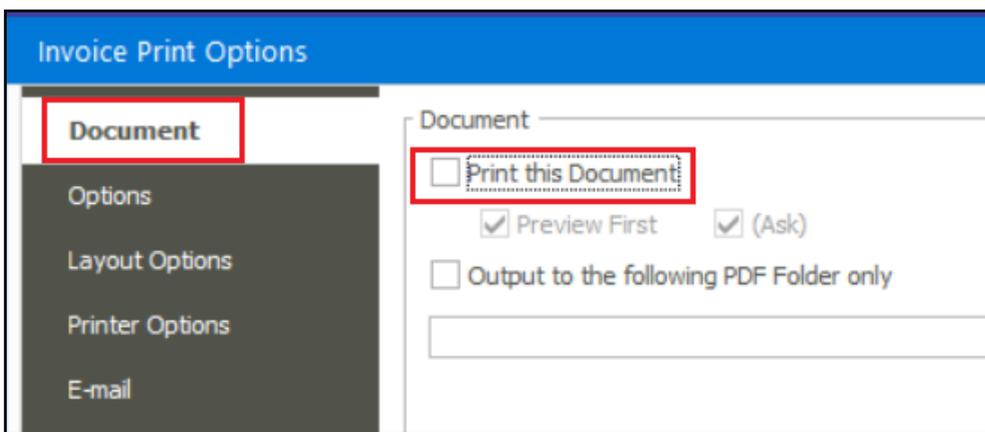
3. On the opened Design screen, go to File | Page Setup.



- On the Printer tab, select the relevant printer driver as can be seen below and click Ok when done.



- You can also test if the printing speed is perhaps improved but unselect the Print this document option.
- If not, and if you want to also preview the document/report, ensure this option is always **selected**.



- Repeat the same steps for all other reports- and source document layouts and per individual workstation.

## 7. Performing a printer reset

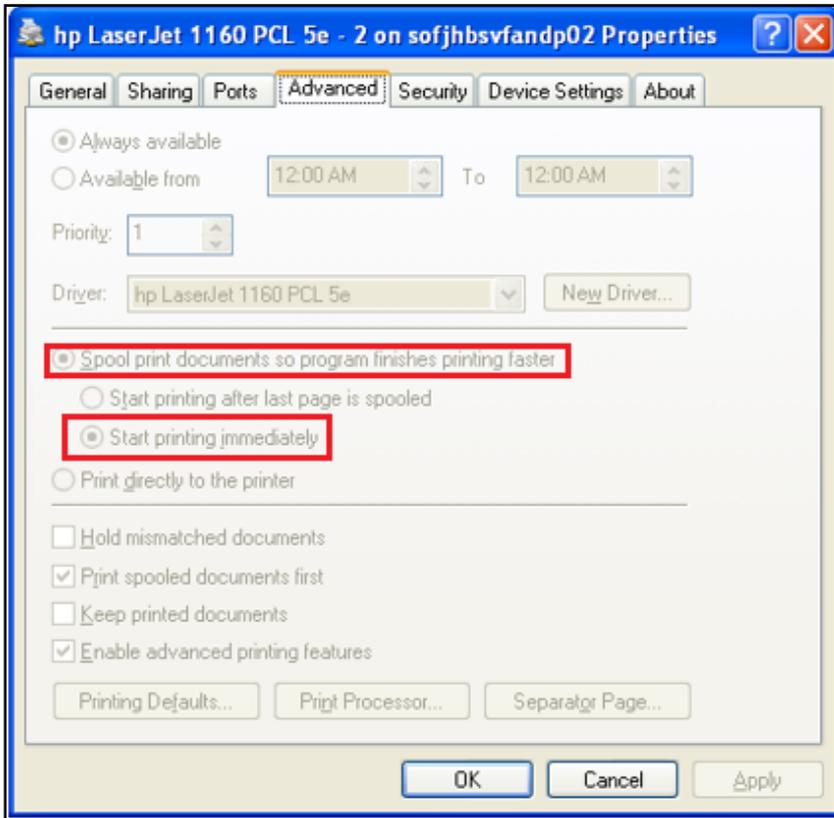
Do the following to reset your local printer and clear any potential built-up memory issues that can lead to ISLE printing issues:

- Completely turn off the printer. Ensure that it's even turned off at the wall socket.
- Shut down the local PC as connected to the printer.
- Turn on the PC again.
- Turn on the printer.

## 8. Specific printer driver settings

Do basic research on your printer driver's various settings to improve its general printing speeds.

For instance, you may find a setting called **Spool Documents so the program finishes faster** (or equivalent) as can be seen below. In this case, also select the **Start Printing immediately** option.



## 9. Prevent converting documents/reports to PDF before printing

Certain printers are poor at memory management and can't efficiently handle PDF documents as printing them may take longer than expected.

Therefore, in such cases, don't print documents in PDF format and rather print them directly from Evolution without saving them first as PDF.

## 10. Printer driver not installed on the Evolution server PC if the network printer is on another machine

You may gain significant speed advances when the relevant printer driver is also installed on the Evolution server PC, even though the actual network printer is linked to another PC.

The following potential scenario explains how the actual printing process contributes to the illusion that the processing time is unacceptably slow:

## The process of a workstation processing and printing a document or report

- The Sage Common (EvolutionCommon) database on the Evolution server PC is queried by the processing workstation to use the correct layout.
- The printing request is returned to the workstation.
- From here, the printing request is then relayed to the printer that may be linked to another PC (which may be different from the local workstation requesting the print job).

Therefore, if the printer driver is also installed on the Evolution server PC, the printing request communication then flows from the workstation to the server PC and from there directly to the PC with the printer linked to it.

Ultimately, having the relevant printer driver also installed on the Evolution server PC, should speed up the printing process and therefore help to increase the overall processing speed.

### **11. Default printer driver on the local PC may be 'corrupted'**

Consider the article (as found in the link below) on how to resolve a corrupted default printer driver on the local PC that may cause Evolution to hang when clicking on any report node.

**<https://za-kb.sage.com/portal/app/portlets/results/viewolution.jsp?solutionid=200414025234872&page=1&position=1&q=Evolution%20company%20hangs%20when%20clicking%20on%20any%20report%20node%20>**

### **12. Source Document freezes if adding text to a PDF document**

Consider the following scenario:

1. Open a source document transaction screen, e.g. Sales Order.
2. Open any PDF Document. This document can either be attached to the opened Sales Order or completely separate from the Evolution company.
3. Add a Signature to the document.
4. Type the Signature information, and note that the PDF and Evolution may freeze.

#### **Expected Outcome:**

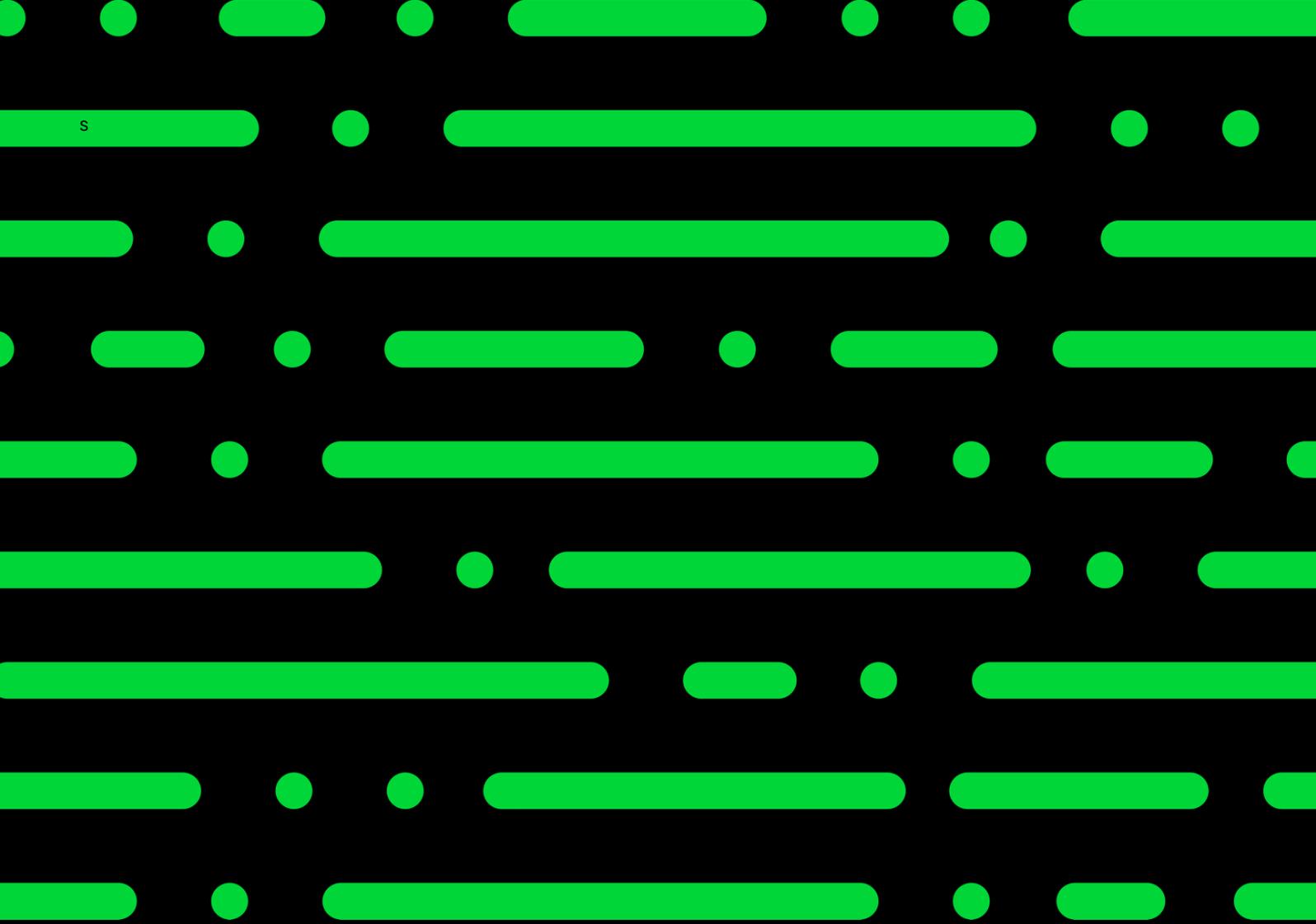
The PDF doc should not freeze, regardless of which Evolution screen is opened at the same time.

#### **The following advice was provided by Evolution Development:**

This matter has been rejected as a possible software bug.

Simply close the Sales Order or the PDF document. This is because you cannot work with both at the same time from a single user perspective.

Secondly, it does not mean that the issue is caused by Evolution, as it could be due to a PDF issue as well.



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