

sage 300

2020 Customer Training Catalogue



2020
Course Curriculum

Introduction

Committed to developing the right training solutions for your needs

Sage product training solutions help you improve your proficiency in your accounting and payroll software. Whether you're a professional, have experience with Sage products, or are just starting out, our courses will help you contribute not only to your company's overall success, but to the success of your career. Our professional training team will provide you with the knowledge and guidance you need to succeed.

Why attend Sage training?

Send employees on training to get the most benefit from your Sage product:

- Improve workflows, increase productivity, and reduce the time it takes to learn how to use the product yourself
- Seek out the knowledge and experience that only Sage can provide
- Learn from trainers that understand Sage products inside and out, and provide a high standard of training
- Advance your career by earning Sage competency certificates
- Separate yourself from other candidates when seeking employment in the accounting and payroll industries

The value of Sage certification

Obtaining a Sage certification should be a priority as it signifies:

- The ability for an employee to deliver a significant return on investment using Sage products
- Competency in performing tasks related to Sage software
- The determination and ability of an employee to complete a task
- The ability to apply skills immediately after completing accreditation training
- A globally accepted means of assessing an essential set of abilities

Completing a Sage assessment

To make it easier for our customers, all Sage assessments are conducted online. This means:

- You can write your assessment on your own time and in the comfort of your own home
- Some of our assessments are open book

What is Sage University?

Sage University is the ultimate resource for all your Sage training needs. It gives you the freedom to choose the courses and methods that best suit your business and learning style. It even includes free resources to help you get started. The courses you choose will help you master each application, maximize your software investment, and streamline your workflow, so you can deliver more value to your clients.

How Sage University works?

Step 1: Log onto SageU.com

Step 2: Select your topic of interest

Step 3: Start studying!

Step 4: Advance your career with Sage Certification

Step 5: Repeat and keep your certification up to date

Training Methods

Anytime Learning Packages

These courses offer self-paced, recorded videos, available whenever and wherever you are.

All you need is a computer, speakers, and a high-speed Internet connection.

Our **Company-Wide Subscription** is the **most cost-effective** way to train your whole team as it allows everyone within your company to go through the training without any additional costs. You only pay once for your selected course!

One price. All access. All employees. All year

Live Online Classes

Online, instructor-led classes scheduled for a specific date and time.

You'll enjoy a **hands-on-lab experience** from the comfort of your office or home.

Your knowledgeable instructor will share their desktop to demonstrate the software and answer your questions.

You'll also connect to a "virtual" computer lab to practice your new skills.

Training Course Details

Sage 300 Accounting Manager

Overview

This Anytime Learning Package is designed for customers who are looking for comprehensive training in general ledger for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in general ledger.

Entrance Requirements

None

Duration

This course takes approximately 1.5 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- General Ledger
- General Journal Entries and General Ledger Batches
- Beginning Balances
- Inquiries, Reports and Financial Statements
- Periodic Processing

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 30 days from registration date, so remember to take the exam before it expires.

Take this course on its own or purchase our **Financials Package** for **more learning and more savings!**

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Sage 300 Accounts Payable Specialist

Overview

This Anytime Learning Package is designed for customers who are looking for comprehensive training in accounts payable for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in accounts payable.

Entrance Requirements

None

Duration

This course takes approximately 2 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Take this course on its own or purchase our **Financials Package** for more learning and more savings!

Course Outline

- Maintaining Accounts Payable
- Tax Services
- Bank Services
- Vendors
- Invoices
- Credit Notes and Debit Notes
- Adjustments
- Payments
- Accounts Payable Reports
- Periodic Processing
- 1099 and CPRS

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
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Sage 300 Accounts Receivable Specialist

Overview

This Anytime Learning Package is designed for customers who are looking for comprehensive training in accounts receivable for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in accounts receivable.

Entrance Requirements

None

Duration

This course takes approximately 3 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Take this course on its own
or purchase our
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Course Outline

- Maintaining Accounts Receivable
- Tax Services
- Bank Services
- Customers
- Invoicing
- Credit Notes and Debit Notes
- Adjustments
- Receipts
- Accounts Receivable Reports and Inquiry Windows
- Periodic Processing

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
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Sage 300 Financials Package

Overview

This Anytime Learning Package is designed for customers looking for comprehensive training in Sage 300 financials software. This package will give you the knowledge and skills necessary to set up and process transactions in General Ledger, Accounts Payable, and Accounts Receivable.

Entrance Requirements

None

Duration

This course takes approximately 6.5 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline and Assessments

This training package consists of the following learning packages:

- Sage 300 Accounting Manager
- Sage 300 Accounts Payable Specialist
- Sage 300 Accounts Receivable Specialist

(see their course outline and assessment options)

**Best value for
money!**

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Sage 300 Inventory Specialist

Overview

This learning package is designed for customers who are looking for comprehensive training in inventory for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in inventory control.

Entrance Requirements

None

Duration

This course takes approximately 3 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Setting Up Inventory
- Defining Items
- Defining Lot & Serial Number Items
- Defining Bill of Materials
- Defining Item Pricing
- Shipping Items
- Receiving, Transferring, and Assembling Items
- Reports, Inquiries, and Periodic Processing

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
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Take this course on its own or purchase our **Distribution Package** for **more learning** and **more savings!**

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Sage 300 Order Entry Specialist

Overview

This learning package is designed for customers who are looking for comprehensive training in order entry for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in order entry.

Entrance Requirements

None

Duration

This course takes approximately 1 hour to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Setup and GL Integration
- Creating Quotes and Orders
- Shipping, Invoicing and Processing Returns
- Reports, Inquiries and Periodic Processing

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
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Sage 300 Purchasing Specialist

Overview

This learning package is designed for customers who are looking for comprehensive training in purchasing for their Sage 300 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in purchase orders.

Entrance Requirements

None

Duration

This course takes approximately 1 hour to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Setting Up Purchase Order
- Requisitions & Orders
- Receiving Items
- Invoicing & Returns
- Inquiries, Reports & Day End Processing

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
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Sage 300 Distribution Package

Overview

This Anytime Learning Package is designed for customers looking for comprehensive training in Sage 300 distribution software. This package will give you the knowledge and skills necessary to set up and process transactions in Inventory Control, Purchase Order, and Order Entry.

Entrance Requirements

None

Duration

This course takes approximately 5 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline and Assessment

This training package consists of the following learning packages:

- Sage 300 Inventory Specialist
- Sage 300 Order Entry Specialist
- Sage 300 Purchasing Specialist

(see their course outline and assessment options)

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Project and Job Costing Specialist

Overview

This Anytime Learning Package is designed for customers looking for comprehensive training in Project and Job Costing for the Sage 300 solution

Entrance Requirements

None

Duration

This course takes approximately 3 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Set up the PJC module,
- Establish the codes necessary for contracts and transactions
- Define integration settings for PJC and other Sage 300 modules.

Assessments

No assessments available for this course

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Sage 300 Payroll Specialist

Overview

This Anytime Learning Package is designed for customers looking for comprehensive training in Payroll for their Sage 300 solution. It will provide the knowledge and skills necessary to setup and process payroll transactions and work with government reports in Sage 300 Payroll.

Entrance Requirements

None

Duration

This course takes approximately 13 hours to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Setting Up Payroll
- Setting Up Payroll Security
- Setting Up and Maintaining Employee Information
- Processing Payroll Transactions
- Working with US Government Reports
- Working with Canadian Government Reports
- Sage 300 Direct Deposit Service

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
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Sage 300 Security and System Administrator Essentials

Overview

This course is designed for customers who are looking for comprehensive training in security and system administration for their Sage 300 solution. It will give you the knowledge and skills necessary to perform essential system administrator functions.

Entrance Requirements

None

Duration

This course takes approximately 10 hours to complete.

Learning Method

This course is only available as a live online class.

Course Outline

- Explain how to set up security and maintain users
- Explain folder set up and management
- Create and maintain databases in SQL Server
- Set up sample or test environments
- Back up data
- Troubleshoot Sage 300
- Export and import data from Sage 300
- Install updates for Sage 300
- Activate new modules
- Customize Sage 300 UI screens

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
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Sage Intelligence Reporting - Beginner

Overview

Ready to get started with Sage Intelligence? This Anytime Learning package will help you start using this powerful reporting tool and show you everything you need to get started on reporting with Sage Intelligence Reporting.

Entrance Requirements

None

Duration

This course takes approximately 1 hour to complete.

Learning Method

This course is only available as an anytime learning course.

Course Outline

- Understand the Intelligence interface
- Run pre-existing reports and customize them for your company
- Use the drill-down capability
- Understand security and setup issues

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 30 days from registration date, so remember to take the exam before it expires.

Take this course on its own or purchase our

**Sage Intelligence
Reporting Financials
or Non-Financials
Specialist Package**
for more learning and more savings!

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Sage Intelligence Reporting - Intermediate

Overview

Are you ready to create your own Sage Intelligence reports? This virtual classroom course will lead you through basic report design with Sage Intelligence. In this course you will learn to create your own reports and new data containers.

Entrance Requirements

Sage Intelligence Reporting - Beginners

Duration

This course takes approximately 5 hours to complete.

Learning Method

This course is only available as a live online class.

Course Outline

- Create a report and define report settings
- Add pivot tables and drill-downs
- Understand the basic features of the Connector Module
- Define a new data container
- Automatically email and post reports

Assessments

Assessment are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 30 days from registration date, so remember to take the exam before it expires.

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Sage Intelligence Reporting Non-Financials Specialist Package

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Sage Intelligence Reporting - Advanced

Overview

This virtual classroom course goes beyond the basics of Sage Intelligence to help you define more sophisticated reports and to expand your knowledge of the Connector module. In this class you will dive into creating more complex reports and using more advanced functionality.

Entrance Requirements

- Sage Intelligence Reporting – Beginners
- Sage Intelligence Reporting – Intermediate

Duration

This course takes approximately 5 hours to complete.

Learning Method

This course is only available as a live online class.

Course Outline

- Create reports using multiple tables and alternate data sources
- Create reports that consolidate data from multiple companies
- Build dashboards
- Use advanced data expressions in a data container
- Create new data connections

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
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Financials Specialist
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Sage Intelligence Reporting - Financials

Overview

Attend this online instructor-led virtual course for specific instruction on creating financial reports in Sage Intelligence using the Report Designer.

Entrance Requirements

- Sage Intelligence Reporting – Beginners
- Sage Intelligence Reporting – Intermediate and Advanced (optional)

Duration

This course takes approximately 8 hours to complete.

Learning Method

This course is only available as a live online class.

Course Outline

- Layout Generator
- Task Pane (previously called the Report Designer Add-In)

Assessments

Assessments are available for purchase separately:

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book. However, you cannot run the Anytime Learning Videos while in the assessment. You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 30 days from registration date, so remember to take the exam before it expires.

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Reporting Financials
Specialist Package**
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Sage Intelligence Reporting – Financial Specialist

Overview

This Learning Package is designed for customers wanting to create financial reports using the Sage Intelligence Report Designer. You will learn how to use both the Layout Generator and the Task Pane.

Entrance Requirements

None

Duration

This course takes approximately 9 hours to complete.

Learning Method

This course is combines anytime learning videos as well as live online classes.

Course Outline and Assessments

This training package consists of the following learning packages:

- Sage Intelligence Reporting – Beginner
- Sage Intelligence Reporting – Financials

(see their course outline and assessment options)

**Best value for
money!**

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Sage Intelligence Reporting – Non-Financials

Overview

This Learning Package is designed for customers wanting the ability to modify and design their own Sage Intelligence reports.

Entrance Requirements

None

Duration

This course takes approximately 11 hours to complete.

Best value for money!

Learning Method

This course is combines anytime learning videos as well as live online classes.

Course Outline and Assessment

This training package consists of the following learning packages:

- Sage Intelligence Reporting – Beginner
- Sage Intelligence Reporting – Intermediate
- Sage Intelligence Reporting – Advanced

(see their course outline and assessment options)

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Sign up for your course

Follow these step-by-step instructions to sign up online:

1. Visit **SageU.com**

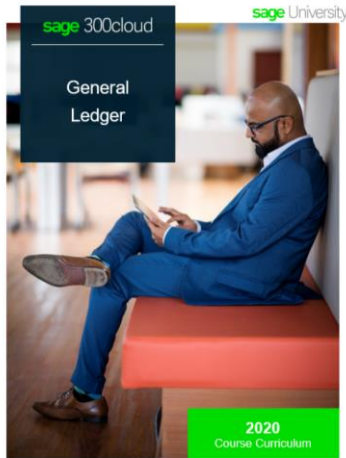


2. Select your region
3. New to Sage U? Select your product and then Create your profile.
4. Complete the form. Make sure you enter your account number.
5. Put your password in a safe place.
6. Select Log on.
7. Select Get started to choose your required training
8. Once you select your course, log on anytime to view your Sage U account details, launch training sessions from your transcript, and print completion certificates.

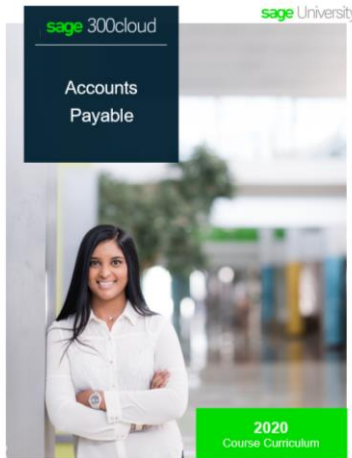
For help navigating Sage U, call **855-724-3864** or email **SageUniversity@Sage.com**.

Self-Study Guides

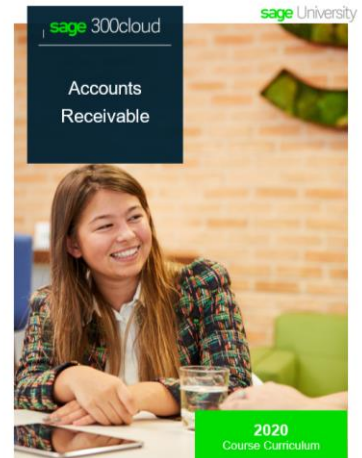
Printable and eBook options available



General Ledger



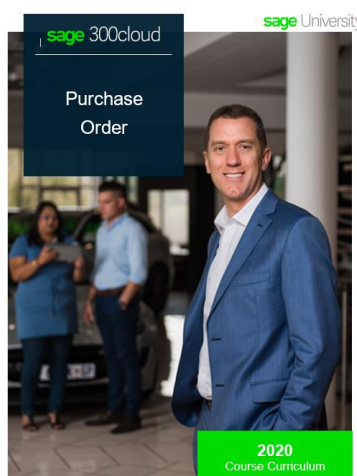
Accounts Payable



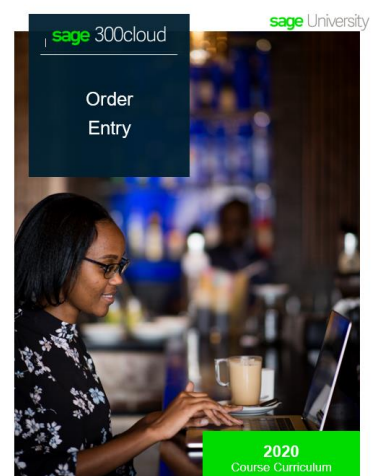
Accounts Receivable



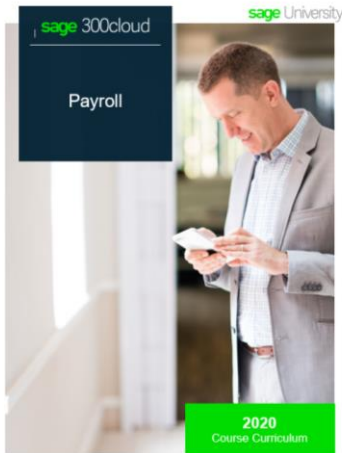
Inventory Control



Purchase Order



Order Entry



Payroll



Project and Job Costing



Common Services



Financial Reporter Design

PURCHASE HERE