

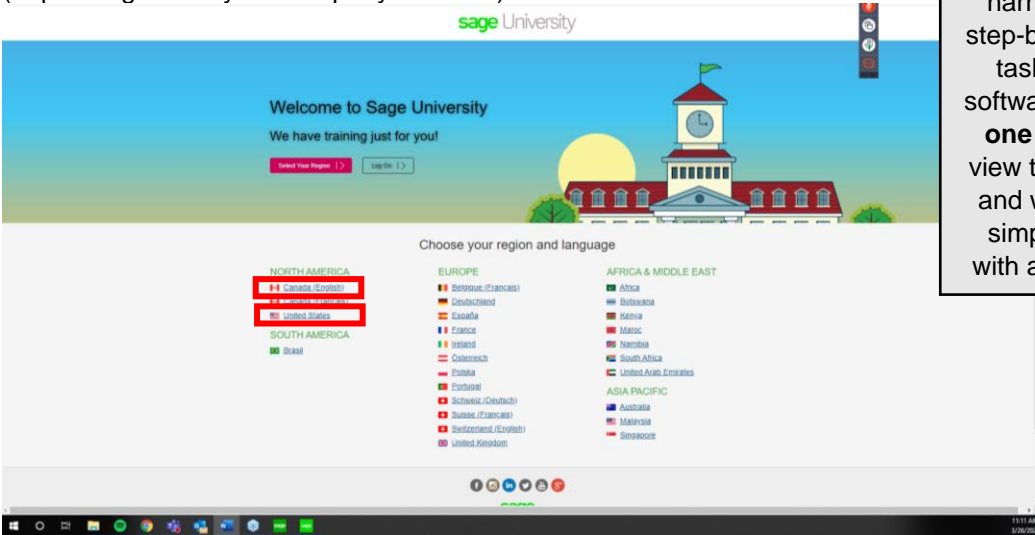
sage 300cloud

Getting Started  
with Sage 300  
Training



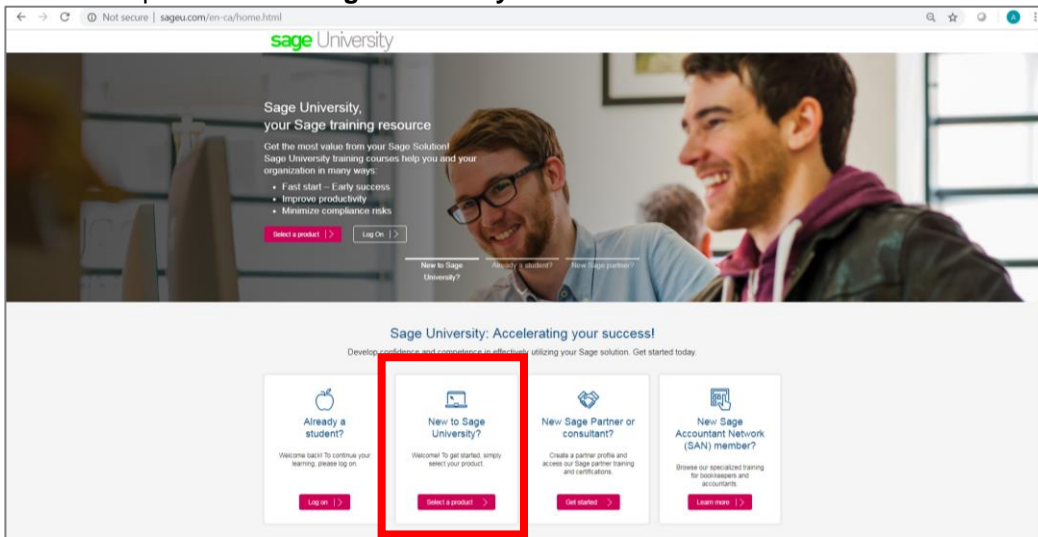
# Creating your Sage University Profile

1. Go to: [www.sageu.com](http://www.sageu.com)
2. Click on Canada and select **Canada – English or United States** (depending where your company is based)

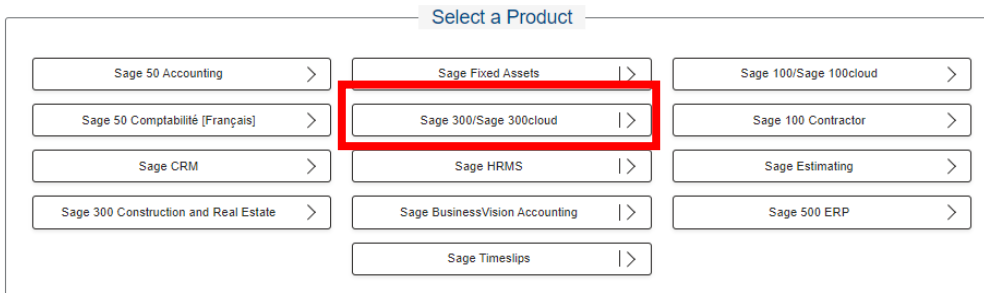


Anytime learning course include lessons that are “bite-size”, instructor-narrated videos showing step-by-step how to perform tasks in your Sage 300 software. **Available 24/7 for one full year** so you can view these lessons as often and whenever you need – simply using a computer with an Internet connection

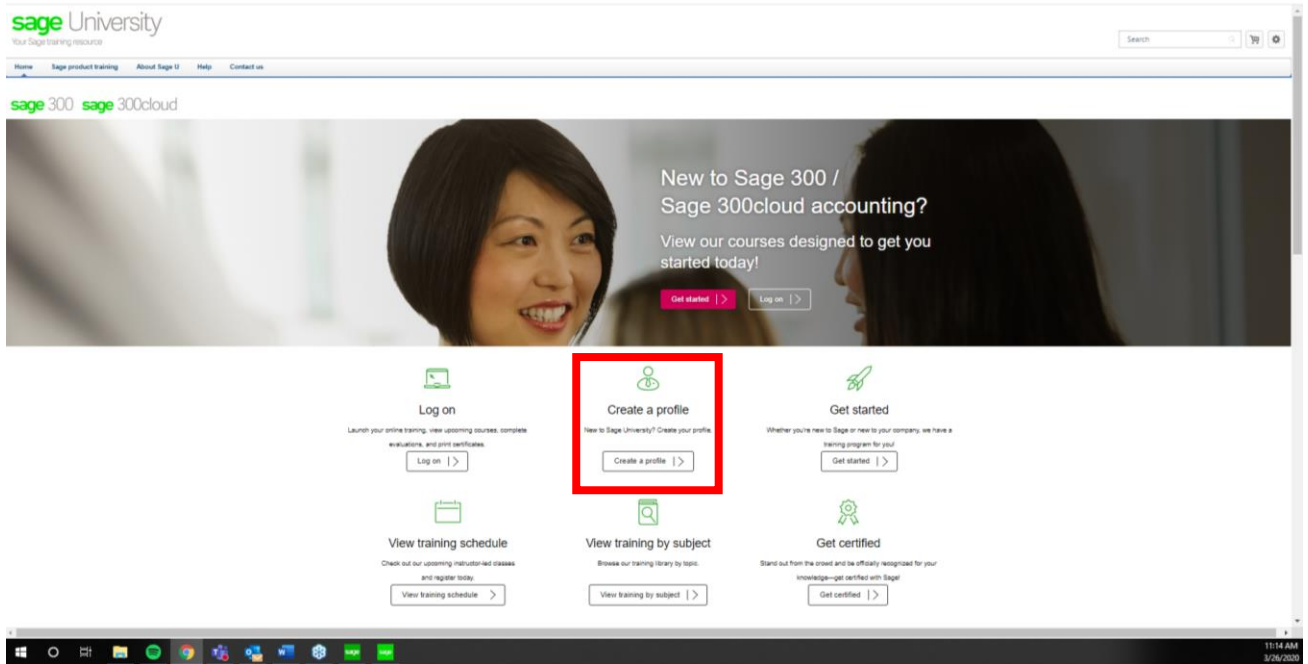
3. Select the option: **New to Sage University?**



4. Next, select: **Sage 300/Sage 300cloud** as your product.



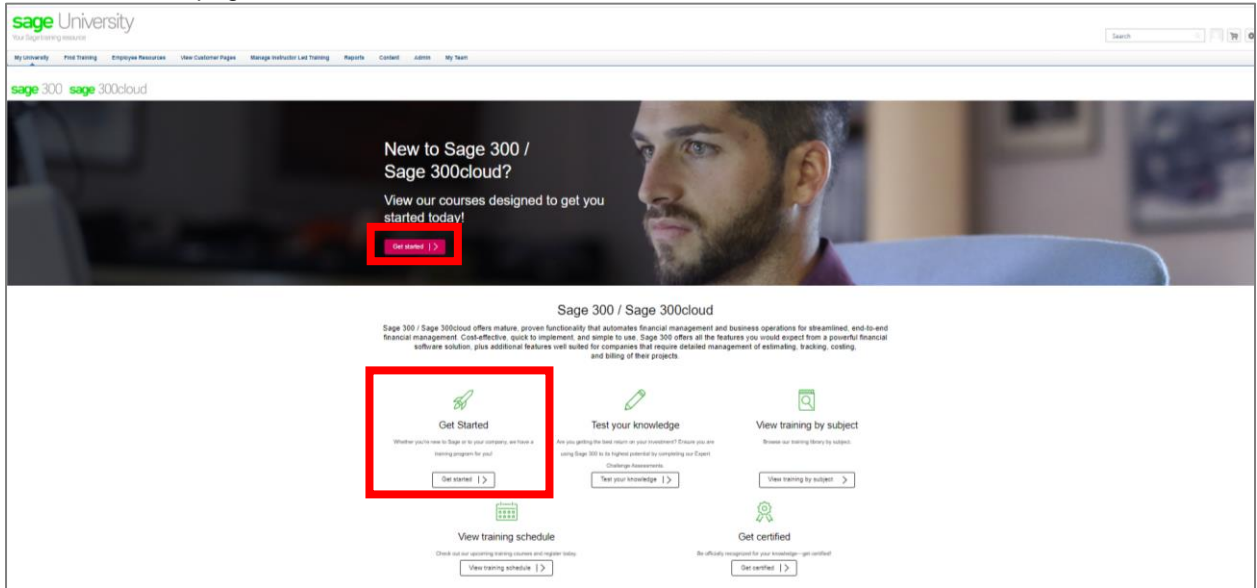
5. Create your profile by selecting: **Create a profile**



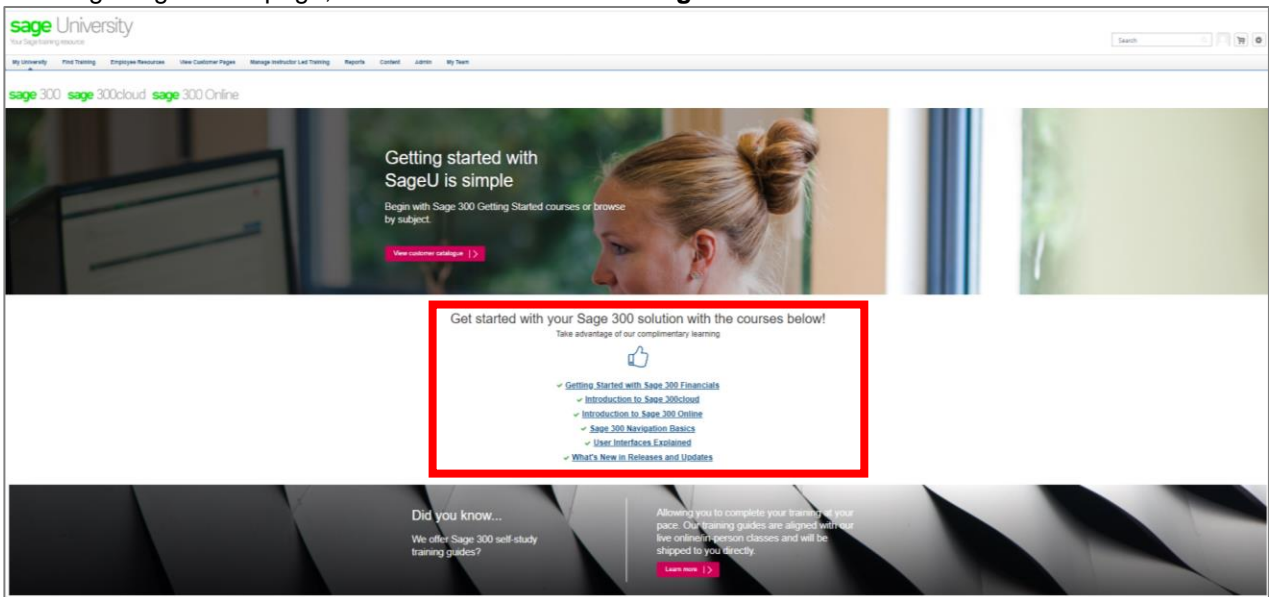
6. **IMPORTANT:** It is of utmost important to enter the correct Account ID (or number) that you have with Sage. This will inform the Sage University System of your business plan and will unlock your discounts.

The image shows a screenshot of the Sage University registration form. The form is titled "New to Sage University" and includes a "Log In" button for existing users. Below the title, there is a "Terms and Conditions" section. The form contains several required fields: "First Name", "Last Name", "Email Address", "Primary Product Line" (set to "Sage 300 (formerly Sage Accpac)"), "Sage Account" (highlighted with a red box), "Phone Number", "Company Name", "Street 1", "Street 2", "City", "State/Province" (a dropdown menu), "Zip/Postal Code", and "Country". There are also password fields for "New password" and "Confirm password". At the bottom of the form, there are "Cancel" and "Log In" buttons.

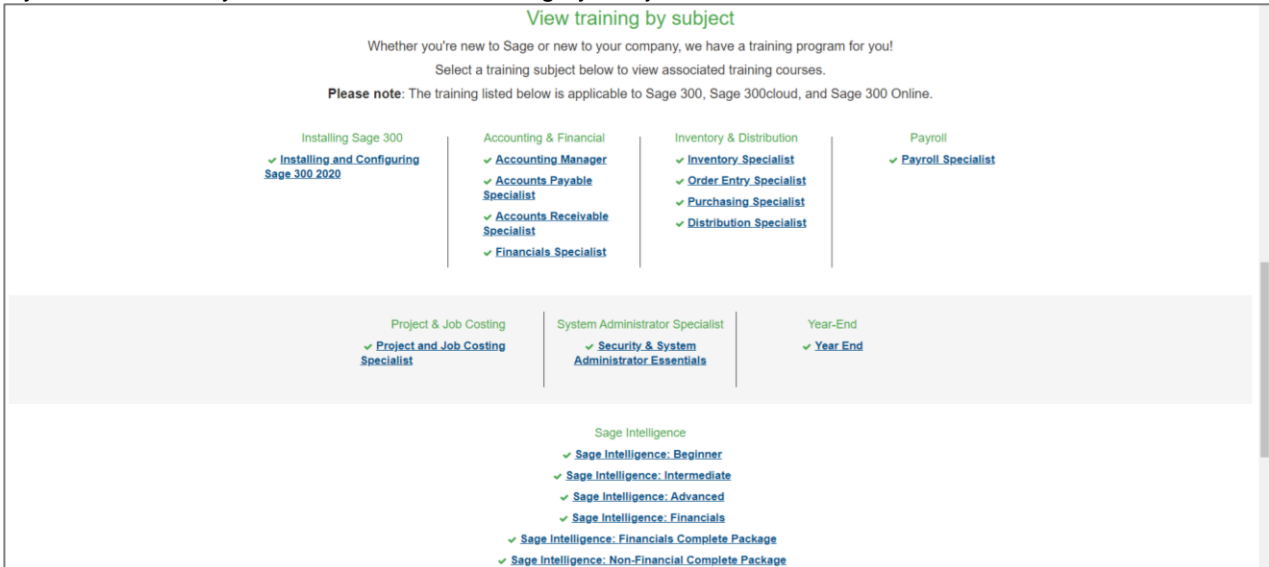
7. On the welcome page, select **Get Started**.



8. On the getting started page, there is a selection of **Getting Started Courses**.



9. If you scroll down, you will see a list of Training by Subject:



10. As an example, for this document we have selected the course: Getting Started with Financials. Simple select **Request** to load the anytime learning package to your transcript.

**Training Details**

**300E - Sage 300 - Getting Started with Financials**  
Learning Package · eLearning/Anytime Learning · €\$186.00 C\$0.00

**Request** **Assign**

This Anytime Learning Package is designed for customers looking for basic training for their Sage 300 solution. This package will give you the knowledge and skills necessary to work with the Sage 300 interfaces, and to use the financials modules: General Ledger, Accounts Payable, and Accounts Receivable.

The skills you will learn in this learning package include:

- Using Sage 300 desktop and web screens
- Establishing appropriate setup options in General Ledger, Accounts Payable, and Accounts Receivable
- Creating and maintaining customers and vendors
- Entering customer and vendor invoices
- Making and receiving payments
- Running reports and inquiries
- Processing periodic functions

This learning package consists of 52 videos that take approximately 3 hours and 15 minutes to complete.

11. You will receive 2 confirmation emails from Sage University that the training has been loaded to your transcript. If you do not receive the email, please check your junk email.

**sage University**  
Your Sage training resource

Dear Avril Zanato,

Thank you for your request to register for 300E - Sage 300 - Getting Started with Financials for C\$0.00 (taxes may apply). This item has been added to your transcript.

If payment is required, a Sage representative will contact you. Once payment has been received, your item will be approved and further details will be emailed to you.

If no payment is required, you can view details within your transcript.

Regards,  
Sage University

**sage University**  
Your Sage training resource

Dear Avril Zanato,

Your registration for 300E - Sage 300 - Getting Started with Financials is confirmed.

You may now visit your ["My learning" transcript](#) to view details.

Your transcript can also be accessed from My Learning on your Sage University home page.

SPECIAL INSTRUCTIONS: None.

**Sage U Policies**  
Cancellation and refund policies are available on SageU.com under *About Sage U*.  
View [Online Licensing Agreement](#) / [CPE Credits](#) / [How to print a receipt](#)

Thank you,  
Sage University

Questions? [Contact us](#)

12. Now select **"my learning transcript"** from either the Sage University email you receive or select My University ... My Learning within Sage University:

**My University**

**My Home Page**

**My Learning**

**Scheduled Tasks**

13. To run the training select: **Open Curriculum**

Active ▾ By Date Added ▾ All Types ▾ Search for training 🔍

Search Results (178)

**300E - Sage 300 - Getting Started with Financials (Expires 3/26/2021)**  
Due: No Due Date Status: In Progress

**Open Curriculum** ▾



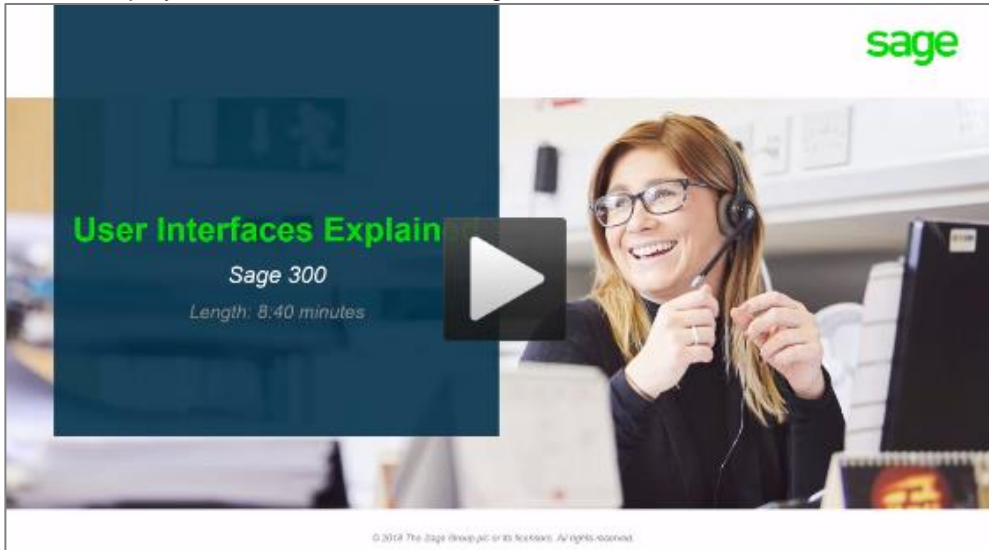
14. Select “View Details”

The screenshot shows a web interface for a training curriculum. On the left, a circular progress indicator shows 4% completion. Below it, a sidebar lists curriculum items: "300E - Sage 300 - Getting Started with Financials" (selected), "SAGE 300 NAVIGATION BASICS", "GENERAL LEDGER", "ACCOUNTS PAYABLE", "ACCOUNTS RECEIVABLE", and "RESOURCES". The main content area is titled "300E - Sage 300 - Getting Started with Financials" and includes an "Options" dropdown. It contains introductory text, a list of skills to be learned, and a list of modules. The first module, "Sage 300 Navigation Basics", is highlighted with a red box around its "View Details" button. Other modules include "General Ledger", "Accounts Payable", "Accounts Receivable", and "Resources", each with its own "View Details" button.

15. Then select “Launch” to start to watch the training video

This screenshot shows the same training curriculum page, but with the "Sage 300 Navigation Basics" module expanded. The "View Details" button for this module is now a "Launch" button, highlighted with a red box. Below the module title, there is a list of six training videos. Each video entry includes a video icon, a title, status, due date, training hours, and a description. Each video has a "Launch" button next to it. The first video, "300ET - Sage 300 - User Interfaces Explained", is highlighted with a red box around its "Launch" button. The other videos are "300ET - Sage 300 - Classic Desktop Overview", "300ET - Sage 300 - Navigating the Classic Desktop", "300ET - Sage 300 - Creating Folders and Shortcuts in the Classic Desktop", "300ET - Sage 300c - Opening the Web Screens", and "300ET - Sage 300c - Navigating the Web Screens".

16. Select the play button to watch the training video:



## Need more help?

Our Sage University Team is on standby to assist. You can contact them by emailing [sageuniversity@sage.com](mailto:sageuniversity@sage.com) or call **1-855-SageUni (1-855-724-3864)** today.



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