

Sage 300

Learning Membership Brochure



Program Overview

The Sage 300 Learning Membership is a single, all-inclusive learning subscription that provides customers with unlimited access to Sage 300 learning material. The membership accelerates onboarding, improves adoption and ensures consistent skills levels across finance, operations, and system administration teams.

Learning Memberships

- Sage University offers anytime, self-paced e-learning, allowing users to learn according to their own schedules and needs.
- Unlimited learners can access the platform during the subscription, supporting organizational growth and onboarding.
- Course content is up to date, authoritative, and aligned with best practices, ensuring reliable learning.
- The model embeds learning into daily operations, supporting ongoing skill development and long-term value.



Getting started with Financials

Learning designed for customers looking for basic training for their Sage 300 solution. Gain 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.

Sage 300 Navigation Basics

- ✓ Classic desktop
- ✓ Web screens
- ✓ User interfaces

Accounts Payable

- ✓ Setup & vendors
- ✓ Invoicing
- ✓ Payments
- ✓ Reports

General Ledger

- ✓ Setup & configuration
- ✓ Journal entries
- ✓ Reporting & inquiries

Accounts Receivable

- ✓ Setup & Customers
- ✓ Invoicing
- ✓ Receipts
- ✓ Reports



Onboarding

Introduction

Learning that provides you with information on the exciting new modernized version of Sage 300. Sage 300c features the same capabilities of Sage 300 with the new benefits of mobility, anytime/anywhere access, and a modern new user interface.

- ✓ Introduction to Sage 300 web screens
- ✓ How to install Sage 300 web Screens
- ✓ How to navigate the Sage 300 web screens

Navigation Basics (this course may be attended as a 1-day virtual training session)

The information you need to understand how to log in and navigate the Sage 300 Classic desktop screens, and web screens.

Overview

- ✓ User interfaces explained

Classic desktop screens

- ✓ Classic desktop overview
- ✓ Navigating the classic desktop
- ✓ Creating folders and shortcuts in the classic desktop
- ✓ Global search in the classic desktop
- ✓ Managing current users
- ✓ Reserve LanPak licenses

Web screens

- ✓ Opening the web screens
- ✓ Navigating the web screens
- ✓ Global search in the web screens
- ✓ Inquiries in the web screens

Notes for classic desktop and web screens

- ✓ Notes overview
- ✓ Installing notes
- ✓ Creating notes
- ✓ Maintaining notes



Sage 300 Financials

Role: Accounting Manager



Learning 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.

General Ledger

- ✓ General Ledger batch, General Ledger integration
- ✓ Accounts, account structures, account groups
- ✓ Range of accounts, account permissions, account budgets
- ✓ Source codes, source journal profiles, segment codes
- ✓ Opening balances

Journal entries and general ledger batches

- ✓ Posting general ledger batches
- ✓ Reversing journal entries
- ✓ Provisional postings
- ✓ General Ledger integration with tax services

Periodic processing

- ✓ Recurring entries, allocation batches
- ✓ Consolidated posted transactions
- ✓ New year, clearing general ledger history
- ✓ Period end maintenance

Inquiries, reports & financial statements

- ✓ Chart of accounts
- ✓ General Ledger Inquiries
- ✓ G/L standard reports
- ✓ Financial reports

Sage 300 Financials

Role: Accounts Receivable Specialist



Learning 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.

Maintaining accounts receivable

- ✓ AR options & account sets
- ✓ Billing, dunning & interest profiles
- ✓ Payments, items & email setup
- ✓ Comments, salespersons & GL integration
- ✓ Information disclosure

Period processing

- ✓ GL batches, year end & opening balances

Bank services

- ✓ Bank options & distribution codes
- ✓ Reconciliation, feeds & transfers
- ✓ Reversals, history & periodic processing

Receipts

- ✓ Receipt entry, deposit slips, refunds & returns

Credit and debit notes

- ✓ Credit/debit batches & journal posting

Tax services

- ✓ Authorities, classes, rates & groups
- ✓ Reverse charges & withholding tax
- ✓ GL integration with Tax services

Multiple contacts

Service centre

- ✓ Payments acceptance

Invoicing

- ✓ Invoice entry & batch processing
- ✓ Batch reports, posting & printing
- ✓ Recurring charges, retainage & interest invoices

Adjustments

- ✓ Adjustment workflow & batches
- ✓ Entering & posting adjustments

AR reports and inquiry windows

- ✓ Setup, customer & transaction reports

Sage 300 Financials

Role: Accounts Payable Specialist



Learning 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.

Maintaining accounts payable

- ✓ Accounts payable options, AP accounts sets
- ✓ AP Payments terms, payment codes, message templates
- ✓ Distribution codes, distribution sets, 1099/ CPRS codes
- ✓ General Ledger Integration

Period processing

- ✓ GL batches, year end & opening balances

Bank services

- ✓ Bank options & distribution codes
- ✓ Reconciliation, feeds & transfers
- ✓ Reversals, history & periodic processing

Vendors

- ✓ Vendor groups, remit-to locations, vendor activity

Invoicing

- ✓ Invoice entry & batch processing
- ✓ Batch reports, posting & printing
- ✓ Recurring charges, retainage & interest invoices

Tax services

- ✓ Authorities, classes, rates & groups
- ✓ Reverse charges & withholding tax
- ✓ GL integration with tax services

Multiple contacts

Payments

- ✓ Manual entries, selection codes, system generated payments, control payments, reversing payments

1099 AND CPRS

Credit and debit notes

- ✓ Credit and Debit batches, posting a journal in AP

Adjustments

- ✓ Adjustment entry workflow, Adjustment batches

Accounts Payable Reports

Sage 300 Operations

Role: Inventory Specialist



Learning 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.

Maintaining inventory

- ✓ Establish inventory workflow and control requirements
- ✓ Configure GL accounts, categories, and locations.
- ✓ Set up pricing, units of measure, and system integrations

Inventory items

- ✓ Define item structures and create inventory items
- ✓ Configure reorder levels, vendor, and customer details
- ✓ Use tools like the Items Wizard for efficient setup

Lot and serial number items

- ✓ Track inventory using lot and serial numbers
- ✓ View detailed tracking and history information
- ✓ Manage traceability for batches and individual items

Assembling master items

- ✓ Assembling a master item & a master item with sub-assemblies

Bills of material

- ✓ Defining, copying and updating bills of materials

Item pricing

- ✓ Base and sale price, item pricing discounts
- ✓ Price checks, dynamic pricing
- ✓ Copying item pricing, updating item pricing
- ✓ Contract pricing

Shipping and returning items

- ✓ Process item shipments and returns
- ✓ Handle serialized and lot-tracked shipments
- ✓ Maintain accurate inventory during transactions

Inventory control transactions

- ✓ Manage receipts, returns, and adjustments
- ✓ Track internal item usage
- ✓ Process lot and serial item transactions

Transferring and adjusting items

- ✓ Transferring stock, transferring lot items
- ✓ Transferring serial number items
- ✓ Adjusting an item's cost or quantity
- ✓ Processing adjustments in inventory control

Reports and inquiry windows

- ✓ Generate inventory reports and inquiries
- ✓ Analyze stock levels and movements
- ✓ View item details by location

Periodic processing

- ✓ Create G/L Batch Function.
- ✓ Clearing history
- ✓ Deleting inactive records
- ✓ Day end processing
- ✓ Order of day end processing
- ✓ Physical inventory count

Sage 300 Operations

Role: Order Entry Specialist



Learning 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.

Maintaining order entry

- ✓ Order entry options
- ✓ Order entry templates
- ✓ Miscellaneous charges
- ✓ Ship-via codes
- ✓ Email messages templates in order entry
- ✓ General ledger integration in order entry

Shipments, invoices and adjustments

- ✓ Shipments in order entry
- ✓ Creating a single shipment from multiple orders
- ✓ Alternate items in order entry
- ✓ Viewing lot number information in order entry
- ✓ Viewing serial number information in order entry
- ✓ Entering invoices
- ✓ Creating a single invoice from multiple shipments
- ✓ Debit and credit notes in order entry

Quotes and orders

- ✓ Order types
- ✓ Entering quotes
- ✓ Entering sales orders
- ✓ Copying orders
- ✓ Creating a single order from multiple quotes

Order entry reports and inquiry windows

- ✓ Statistics and inquiries in order entry
- ✓ Order entry reports

Periodic processing

- ✓ Day end processing in order entry
- ✓ Create G/L batch function in order entry
- ✓ Clearing history in order entry
- ✓ Order entry improvements in Sage 300 2022

Sage 300 Operations

Role: Purchasing Specialist



Learning 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.

Maintaining purchase orders

- ✓ Configure purchase order options and workflows
- ✓ Set up vendor contracts, templates, and shipping methods
- ✓ Manage additional costs, email settings, and non-inventory setups

Receiving items

- ✓ Record receipts against purchase orders
- ✓ Handle lot-controlled item receipts
- ✓ Combine multiple Purchase order into a single receipt

Purchase orders reports and inquiry windows

- ✓ Access inquiries and purchasing statistics
- ✓ Generate reports for tracking and analysis
- ✓ Monitor vendor performance and order status

Requisitions and orders

- ✓ Create requisitions and convert them into purchase orders
- ✓ Generate Purchase orders from multiple sources (requisitions, order entry, inventory)
- ✓ Copy and consolidate documents for efficiency

Invoicing and returns

- ✓ Create invoices from purchase transactions
- ✓ Process returns, debit notes, and credit notes
- ✓ Consolidate invoices from multiple receipts

Periodic processing

- ✓ Perform day-end processing and GL batch creation
- ✓ Clear historical data and maintain system performance
- ✓ Review system improvements and updates (e.g., Sage 300 enhancements)

Sage 300 Operations

Role: Project Job Costing Specialist



Learning designed for customers looking for comprehensive training in Project and Job Costing for the Sage 300 solution. These videos give you the knowledge and skills needed to set up the PJC module, establish the codes necessary for contracts and transactions, and define integration settings for PJC and other Sage 300 modules.

Maintaining project and job costing

- ✓ Set up project costing structure, including cost types and contract structures
- ✓ Define projects, categories, employees, equipment, and expenses
- ✓ Integrate with GL and manage charges, overheads, and subcontractors

Project and job costing transactions

- ✓ Record opening balances and track transaction history
- ✓ Process costs, materials, timecards, and allocations
- ✓ Revise estimates, adjust entries, and post transactions

Periodic processing

- ✓ Create GL batches and clear historical data
- ✓ Process payroll updates and A/R billing
- ✓ Handle revenue recognition, retainage, and reopening projects

Contract maintenance

- ✓ Manage contracts, projects, and categories in one interface
- ✓ Use the contract wizard for quick setup
- ✓ Track budgets and review transactions for each contract

Job related transactions in other sage 300 modules

- ✓ Purchase orders, accounts payable
- ✓ Payroll, accounts receivable, order entry

Project and job costing reports

- ✓ PJC Setup Reports
- ✓ PJC Transaction Reports
- ✓ PJC Analytical Reports

Sage 300 Technical

Role: Security & Systems Administrator

Comprehensive training in security and system administration for Sage 300. It will give you the knowledge and skills necessary to perform essential system administrator functions.

- ✓ Behind the scenes
- ✓ All about Sage 300 databases part 1
- ✓ All about Sage 300 databases part 2
- ✓ Backing up data
- ✓ Importing and exporting data
- ✓ Troubleshooting Sage 300
- ✓ User security
- ✓ Product and license information
- ✓ Customizing the interface
- ✓ Optional fields
- ✓ Visual process flows



Sage 300 Sage Intelligence

Sage Intelligence: Financials package

A combined learning package consisting of:

- ✓ Sage Intelligence: Beginner
- ✓ Sage Intelligence: Intermediate
- ✓ Sage Intelligence: Advanced

Sage Intelligence: Non - Financials package

A combined learning package consisting of:

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



Sage 300 Year End Enablement

In these videos you will learn about closing periods and the year, creating a backup, which reports to print, and how to print and e-file required government reports such as T4 Tax Forms, and W-2 Tax Forms.

Sage 300 Year end

- ✓ Starting a new year
- ✓ Closing a fiscal year
- ✓ Creating a backup
- ✓ Printing reports for year end
- ✓ Updating tax tables
- ✓ Create an account to e-file



Sage CRM

Unlock the potential for substantial business growth by embracing automation to eliminate inefficiencies and boost productivity. Discover how to customize your CRM system to perfectly align with your specific business needs. Tailor fields and screens to cater precisely to your team's requirements, resulting in improved user efficiency and reduced redundancy.

- ✓ Fundamentals
- ✓ Sales specialist
- ✓ Customer specialist
- ✓ Outstanding security and system management
- ✓ Outstanding document and product management

