Sage

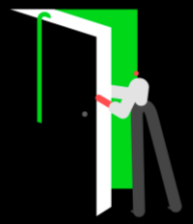
Sage Operations

Customer Learning Catalog





Table of contents



Sage University

Learning Offerings
Training When You Need It
Learning Curriculum
Badges and Certification
How to create a Sage University Profile



Course List

Getting Started
Accounting
Sales
Inventory & Shipping
Manufacturing
System Administrator
Additional eLearning

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Build your skills on Sage Operations: Customer Learning that helps you succeed

Whether you are a new Sage Operations user or an experienced user looking for training on what's new or advanced learning, Sage University is the right place for you. With training options that are affordable and convenient, there are so many ways to learn.

Learn from the experts and become one yourself.

Self-paced Learning

Designed for users who want a step-by-step how-to. With this objective in mind, you will receive eBooks and a training environment to practice using step-by-step exercises.

Job Role

Available with recommended courses that best fits what you do for your organization.

eLearning

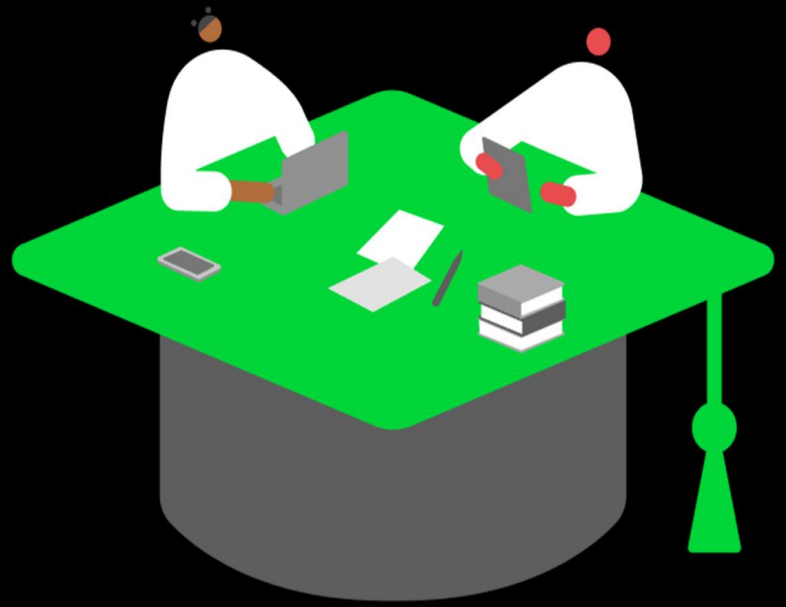
Self-paced recorded videos available whenever you are. Ideal for learning new concepts or acquaint new hires with basics of Sage Operations

To register for courses and certifications visit **www.sageu.com**

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Training when *you* need it

Learning Life Cycle



Learning for each phase of your learning life cycle or business changes.

Tools for your learning journey:

- **Self-Paced Learning**
- **Self-Paced eLearning**
- **Role Based Learning Paths**
- **Badging**

Implementation → Next level of skills → New roles → New hires → New products and updates

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Customers Learning Curriculum

The learning paths are designed to provide a progressive learning experience from beginner to expert level.

1. **Getting Started** programs introduce learners to the **basic functions and operations** of the application within their role or competency. Learners should be considered competent enough able to begin to perform their role or competency.

2. **Core** programs are the target of attainment for most “regular” learners. Learners who have completed Core curriculum should be considered ready to fulfill the everyday duties of their role or competency with minimum assistance or supervision.

Additional Learning can be taken any time to extend your skills as you gain experience in the field.

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Badges

Badges recognize your newly earned skills and award your personal accomplishments



You can earn multiple badges at the course level and showcase your accomplishments on social media. Once you complete specific courses, you will earn a badge that you can see in Sage University. Then, you will receive a congratulatory email with downloadable badges. You can find courses with badges on Sage University now, and more are coming!

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Create your Sage University profile

First create your Sage Account

To create a Sage University profile, you will need to log on to your **Sage account**. If you don't already have a Sage account, you can create one using the "Create account" link found on the bottom of the on the **log in** page.

You will need access to your email to retrieve a validation code to create your Sage account.

You can **view the FAQs** about your Sage account login to learn more.

Next create your Sage University Profile

Once you've logged on to your Sage account, complete the Sage University **profile creation form** and get started.

Please note that creating a Sage University profile is a one-time task. Once complete, you will simply log on to access Sage University.

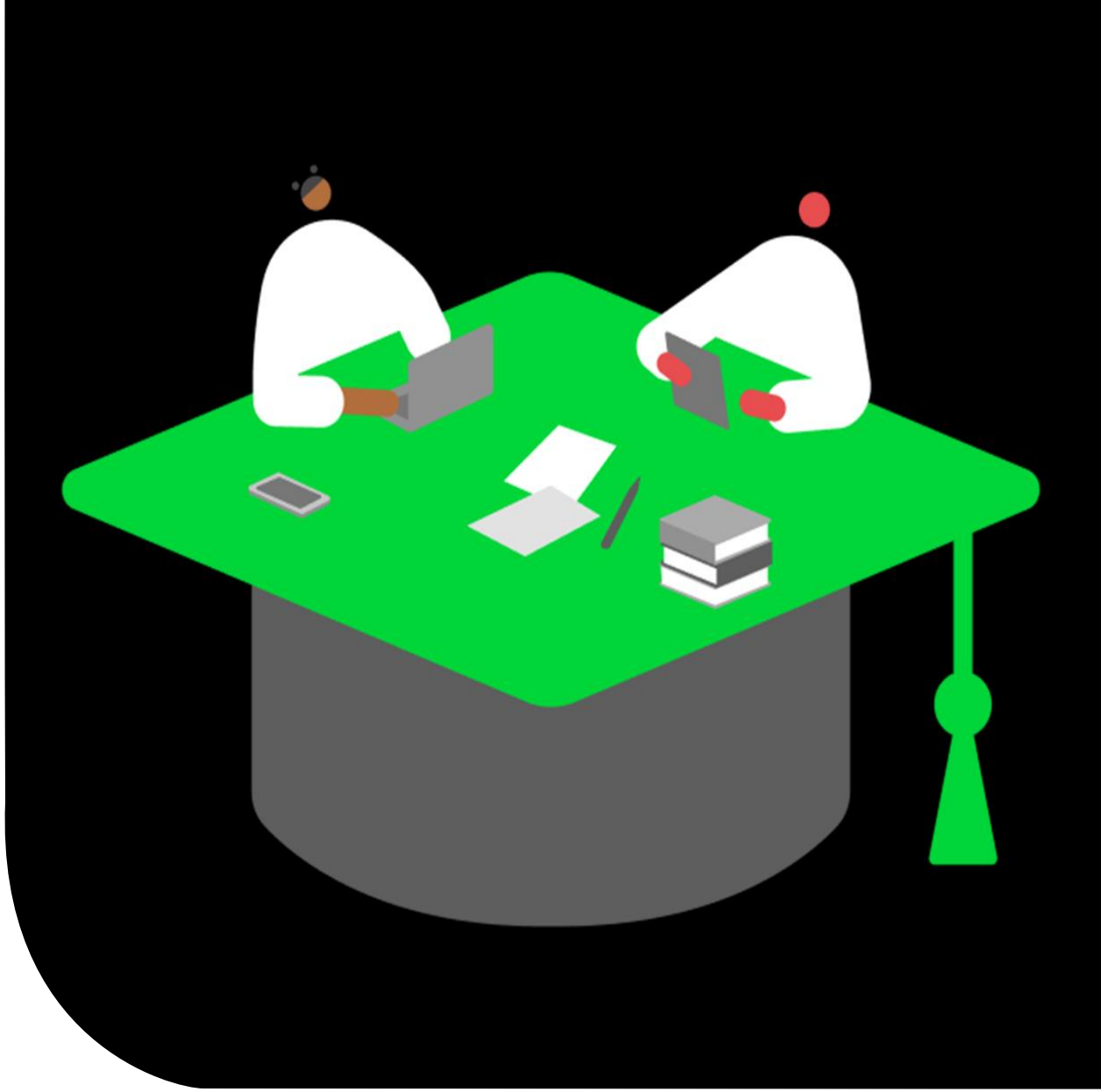
Now you can log on to Sage University

Visit **Sage University** to log on or to choose your Country/Region.

Search the pages by Role or by topic and register for training courses.

Access your transcript, to view eLearning, attend a Virtual Class you have registered for, and to view past training completed.

If you have any issues, contact **sageuniversity@sage.com**



© 2024 The Sage Group plc, or its licensors. All rights reserved.

Getting Started with Sage Operations

1.5 hours

With this interactive eLearning course, you will gain an understanding of Sage Operations including how to access your profile, create and use a dashboard, and most importantly how to navigate in the program. You will also gain an understanding of the different types of personas typically interacting with the program.

All roles

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Accounting Manager Essentials

4+ hours

As an Accounting Manager, it is important you understand how to use various functions in Sage Operations. This includes how posting accounts and journals are defined, how entries are posted, and journal entries are generated. This also includes understanding how customers and suppliers are created, how transactions such as sales invoices, purchase invoices, and credit memos are entered and posted.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand the functions involved when posting transactions.
- Determine the posting accounts involved when posting to a journal and when entries are posted to an integrated financial solution
- Define information for companies, sites, and business entities.
- Understand how to enter transactions such as customer and supplier invoices and credit memos.
- You will understand the process for generating journal entries for transactions posted.
- Use inquiry functions to view and track information such as journal entries generated.

Accounting Manager

Accounts Payable Essentials

4+ hours

As an Accounts Payable Clerk or Accounting Manager, it is important you understand how to use various Purchasing functions in Sage Operations. This includes how to set up specific functions such as payment terms, create and update supplier information and pricing, and create and post purchase invoices and credit memos.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Create delivery modes and supplier payment terms.
- Create and maintain supplier information including specific supplier pricing
- Enter a purchase invoice against a purchase receipt.
- Enter a credit memo for purchase returns or adjustments to the quantity/cost received.

Accounts Payable Clerk

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Accounts Receivable Essentials

4+ hours

As an AR Clerk or Accounting Manager, it is important you understand how to use various Purchasing functions in Sage Operations. This includes how to set up specific functions such as payment terms, create and update supplier information and pricing, and create and post purchase invoices and credit memos.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

The curriculum and exercise eBooks included in this course are:

- How to create delivery modes and customer payment terms.
- How to create and maintain customer information including specific customer pricing
- How to enter a sales invoice against a sales shipment.
- How to enter a credit memo for sales returns or adjustments to the quantity/price shipped.

Accounts Receivable Clerk

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Sales Reps and Customer Support Essentials

4+ hours

As a Sales Rep or Customer Support representative, it is important you understand the sales process and how to use the various sales functions. This includes how set up specific sales functions and customers, as well as how to enter sales order quotes, convert quotes to sales orders, allocate stock, process shipments, enter invoices and credit memos, and enter return requests. You will also learn how the setup of a company, site, and item impact how sales transactions are entered.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand the Company, Site, and Business entities impact information entered.
- Create and manage customers.
- Create quotes and convert to sales orders.
- Print sales orders individually or in mass.
- Create a work order for purchase order from a sales order.
- Allocate stock to a sales order.
- Process shipments and invoice for items shipped.
- Enter a customer return request including the receipt of the items from the customer.
- Enter a credit memo for returned items or price adjustments.

Customer Support Representative
Sales Representative

Sales Essentials

4+ hours

As a Sales Manager or Sales Administrator, it is important you understand the sales process and how to use the various sales functions. This includes how set up specific sales functions and customers, as well as how to enter sales order quotes, convert quotes to sales orders, allocate stock, process shipments, enter invoices and credit memos, and enter return requests. You will also learn how the setup of a company, site, and item impact how sales transactions are entered.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand the Company, Site, and Business entities impact information.
- Create and manage customers.
- Create quotes and convert to sales orders.
- Print sales orders individually or in mass.
- Create a work order for purchase order from a sales order.
- Allocate stock to a sales order.
- Process shipments and invoice for items shipped.
- Enter a customer return request including the receipt of the items from the customer.
- Enter a credit memo for returned items or price adjustments.

Sales Manager
Sales Administrator

Self-paced learning
eLearning
Badge available
What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Distribution Manager Essentials

4+ hours

As a Distribution Manager, it is important you understand key functions associated with stock and purchasing inventory items. You will learn about the various functions related to setting up stock, how to allocate and deallocate stock, how to enter purchase requisitions, and enter a purchase receipt and purchase return. You will also learn about the various inquiry functions to aid you in your day-to-day tasks.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand the Company, Site, and Business entities impact information entered.
- Define locations, storage zone, location sequence numbers, containers, and LPNs.
- Process stock transactions enabling you to better manage your inventory.
- Allocate and deallocate stock on sales orders and process a sales return.
- Enter a purchase requisition.
- Receive items against a purchase order as well as process a return toa supplier.
- Use the various Manufacturing inquiry functions to track production and material tracking.
- Use various inquiry functions in Stock and Purchasing to view and track information.

Distribution Manager

Inventory Manager Essentials

4+ hours

As a Inventory Manager, it is important you understand key functions associated with managing your inventory. You will learn how to setup stock features and create items. To manage your stock, you will learn how to use various stock and purchasing transactions for receipts, issues, adjustments, and stock changes. Lastly, you will understand the process used to return items to a supplier by creating and processing purchase returns.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other and interact with an instructor.

After completing the course, you will be able to:

- How to set up locations where stock is stored within a site.
- How to define containers and license plate numbers.
- How to set up stock items including raw materials and finished goods.
- How to assign stock to a site and define the cost valuation method.
- How to set the cost for the Standard cost method.
- How to receive and issue stock without sales or purchase orders.
- How to adjust and change stock such as moving stock between locations.
- How to run the MRP calculation.
- How to perform a stock count and enter the results.
- How to receive items on a purchase order and process supplier returns.
- How to allocate and deallocate items for sales orders, process shipments, and receive items returned from a customer.
- How to view stock-related information for your organization.

Inventory Manager

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

Sage

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Procurement Manager Essentials

4+ hours

As a Procurement Manager, it is important you understand the procurement process and how to use the various functions within the program. This includes understanding key information for companies, sites, and business entities, how to setup and use cost and item categories, as well as setting up and view item information. You will also learn how to use functions used when determining which items need to be purchased and/or manufactured, purchasing functions such as entering and receiving items on a purchase order, and finally the inquiry functions available enabling you to track and view information entered.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand the Company, Site, and Business entities impact information entered.
- Create indirect costs, item categories, and item information.
- Use the MRP calculation and Stock reordering to determine items that need to be purchased and/or manufactured.
- Setup delivery modes, payment terms and customers.
- Create suppliers and supplier-item information.
- Enter purchase requisition, purchase orders, and purchase receipts.
- Return items to a supplier and enter the appropriate invoices and credit memos.

Procurement Manager

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Production Essentials

4+ hours

As a Production Engineer, Production Planner, or Production Manager, it is crucial to grasp the key setup options and transaction processes relevant to your role in manufacturing. This includes understanding the item and site setup requirements for Manufacturing, as well as creating a bill of materials and routing. You will also learn to define shifts and capability levels, and how to create labor, tool, and machine resources. Finally, you will learn to create work orders and track information for production receipts, material consumption, and labor.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- The items and site setup required for use with Manufacturing.
- How to create a bill of materials and routings.
- How to define shifts and capability levels for resources.
- How to create labor, tool, and machine resources.
- Understand the purpose of resource groups and how they are created.
- Understand work order categories and how to create a work order.
- How to enter tracking information for production receipts, material consumption, and labor as part of the manufacturing process.
- Understand the purpose of the various inquiry functions.

Production Engineer
Production Planner
Production Manager

Design Engineer Essentials

4+ hours

As a Design Engineer, it is essential to understand the key setup options and processes for creating work orders and processing transactions. This includes creating a bill of materials and routing, as well as generating work orders manually and through MRP calculations. You will also learn to allocate and deallocate stock for work orders, enter production receipts, and track material consumption and labor. Finally, you will explore various inquiry functions to view and track information in Manufacturing.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- How to create a bill of materials and routing.
- Understand work order categories and how to create work orders.
- How to modify work orders and change the status from Planned to Firm.
- How to allocate and deallocate stock for a work order.
- How to create work orders from an MRP calculation and from a sales order.
- How to enter tracking information for production receipts, material consumption, and labor.
- Understand the purpose of various inquiry functions.

Design Engineer Essentials

Self-paced learning
eLearning
Badge available
What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

System Administrator Essentials

4+ hours

This course is designed for System Administrators. As a System Administrator, it is important you understand how to define information impacting the program. This includes how to set up specific functions such as company and site, as well as define key setup functions such as users and security, turn on or off specific options, and troubleshoot notifications for errors displayed in the system

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand where integrated applications such as Sage Intacct are configured.
- Create and configure companies, business entities, and sites.
- Set up roles, users, and other security information.
- Define sequence numbers for such items as documents and lot/serial numbers.
- Define Intrastat information necessary for EU countries.
- View notification history and perform tasks such as synchronization of data.

System Administrator

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Introduction to Workflows

20 minutes

Welcome to the ‘Introduction to Workflows” course for Sage Operations. In this interactive eLearning course, you’ll discover how to streamline your business processes using Workflow Automation—a powerful tool designed to be simple, scalable, and smart. In this course, you will learn how to use the workflow designer to create your own workflow.

After completing the course, you will be able to:
- Locate the Workflow Designer in Sage Operations
- Identify and understand the available options within the designer
- Create a trigger event for a sales order
- Add steps to confirm, print, and attach the sales order
- Manage allocations within the automation
- Automate email communications
- Configure and send notifications

All roles

How to create new dashboards

15 minutes

In this interactive eLearning course, you will learn where and how to create dashboards, explore the available configuration options, and build both standard and advanced dashboards using widgets, tables, and charts.

After completing the course, you will be able to:
- Create new dashboards and the available options
- Add standard and custom widgets
- Add and configure tables with filtered data for deeper analysis

Operations/Distribution Managers, Business Analysts, and Power Users

Self-paced learning
eLearning
Badge available
What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Setting up the pre-requisites for AP Automation

20 minutes

In this interactive eLearning course, you will learn how to set up AP Automation and connect the integration and quickly configure settings at the tenant or company level to streamline operations and create targeted email addresses. This course is ideal for System Administrators and Accounting Managers.

After completing the course, you will be able to:

- Set Up AP Automation and establish the prerequisites for automation.
- Seamlessly integrate and configure settings.
- Select configured options for targeted email management.

System Administrator

How to use AP Automation in Sage Operations

20 minutes

Simplify your workflow by easily uploading purchase documents directly or through email synchronization. In this **interactive eLearning course**, you'll quickly match and fill in any missing details, select multiple documents at once with bulk actions, and resolve outstanding issues with ease. Stay in control and keep your processes moving smoothly. This course is ideal for Accounting Managers and Accounts Payable Specialists/Clerks.

After completing the course, you will be able to:

- Upload purchase documents to simplify document management.
- Sync your records via email to ensure your data is up-do-date effortlessly.
- Match all your information to ensure accuracy and completeness.
- Confirm multiple documents at once using bulk actions for efficiency.
- • Resolve any issues by maintaining smooth and error-free processes.

System Administrator

To register for courses and certifications visit www.sageu.com

Self-paced learning

eLearning

Badge available

What role is this course for?

Sage

© 2024 The Sage Group plc, or its licensors. All rights reserved.

How to create a custom field

20 minutes

As a Sales Rep or Customer Support representative, it is important you understand the sales process and how to use the various sales functions. This includes how set up specific sales functions and customers, as well as how to enter sales order quotes, convert quotes to sales orders, allocate stock, process shipments, enter invoices and credit memos, and enter return requests. You will also learn how the setup of a company, site, and item impact how sales transactions are entered.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:

- Understand how the Company, Site, and Business entities impact information entered.
- Create and manage customers.
- Create quotes and convert to sales orders.
- Print sales orders individually or in mass.
- Create a work order for purchase order from a sales order.
- Allocate stock to a sales order.
- Process shipments and invoice for items shipped.
- Enter a customer return request including the receipt of the items from the customer.
- Enter a credit memo for returned items or price adjustments.

Distribution Manager
Inventory Manager
Procurement Manager
Sales Manager
System Administrator

How to upload an attachment

15 minutes

In this interactive eLearning course, you will be fully capable of understanding of how to add attachments in the various functions in Sage Operations..

After completing the course, you will be able to:

- Upload attachments for specific records
- Manage documents: add, view, and remove in one place
- Utilize functions for managing attachments.

All roles

To register for courses and certifications visit **www.sageu.com**

Self-paced learning
eLearning
Badge available
What role is this course for?

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Reporting Overview

15 minutes

In this interactive eLearning course, you will learn about all the reporting options available to you in Sage Operations, including how to customize and print lists, how to create a custom report, how to create a variable, and gain an understanding of conditional blocks.

After completing the course, you will be able to:
- Understand how to print and customize lists.
- Understand the basics of creating a basic report.
- Understand how variables are used when creating a report.
- Understand how to use conditional blocks when creating or modifying reports.

Accounting Manager
Sales Administrator
Sales Manager
Sales Representative
Distribution Manager
Procurement Manager
System Administrator

How to create a list report

20 minutes

In this interactive e-learning course, you will gain a comprehensive understanding of creating a list report using the easy-to-use report writer. This includes information on report templates, how to access the report/writer, the options available, and how to format a list report.

After completing the course, you will be able to:
- Understand where to locate all the report templates.
- Launch the report writer/designer.
- Understand the type of options available whilst creating a report.
- Produce and format a list report.

Distribution Manager
Inventory Manager
Procurement Manager
System Administrator

To register for courses and certifications visit **www.sageu.com**

Self-paced learning
eLearning
Badge available
What role is this course for?

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Understanding Batch Task History

15 minutes

In this interactive eLearning course, you will be fully capable of grasping the batch task history process. This includes how to process bulk printing, how to view batch task history, and how to monitor the progress of tasks.

After completing the course, you will be able to:
- Understand how to process bulk printing.
- How to view batch task history information.
- How to monitor the progress of the various tasks listed

All roles

Importing data using a template

40 minutes

In this interactive eLearning course, you will learn the main property types, constraints, and how to execute the import process using a template. You will import accounts into a chart of accounts, beginning with the template generation, fill in some data into a .csv file, import the template file, and finally check the history log.

As part of this learning, you have access to a 30-day training environment to complete the course exercises, as well as an Instructor hour course to ask questions, and a Sage Community to view and post questions to other customers and interact with an instructor.

After completing the course, you will be able to:
- Understand the main property types
- Generating a template
- Understand the constraints impacting how data is entered in the template
- Import and view the history log

System Administrator

Self-paced learning
eLearning
Badge available
What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

Security and Users

40 minutes

In this interactive eLearning course, you will learn about the security and user model in Sage Operations. You will discover how roles, sites, and authorization groups implement security and afford user functionality.

After completing the course, you will be able to:

- Create and manage users.
- How to create authorization groups.
- How to create users and assign the appropriate permissions.

System Administrator

Self-paced learning

eLearning

Badge available

What role is this course for?

To register for courses and certifications visit www.sageu.com

© 2024 The Sage Group plc, or its licensors. All rights reserved.

About Sage

Sage is the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs.

Like many of the businesses we serve, Sage began as a small business and has grown beyond what seemed imaginable. Today, over 11,000 colleagues support millions of entrepreneurs across more than 20 countries as they power the global economy.

We help drive today's business builders with a new generation of solutions to manage everything from money to people.

Our social and mobile technology provides live information so you can make fast, informed decisions anytime, anywhere in the world. We support our business builders for life by offering choice, support, expertise, and innovation. We champion your causes and provide world-leading advice and support when you need it most.

For more information, visit **www.sage.com**

Sage

© 2024 The Sage Group plc, or its licensors. All rights reserved.

sageu.com



© 2024 The Sage Group plc, or its licensors. All rights reserved.