

sage 100

2020 Customer Training Catalog

Course Curriculum

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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?

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 complete your assessment in your own time
- You can complete your assessment at your convenience

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 company.

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!

Anytime Learning lessons are included at no charge in your Gold Business Care Plan.

One price. All access. All employees. All year

Live Online Classes

Online, instructor-led classes are 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.

Assessments to Earn Certification

Assessments are online and consist of multiple-choice, multiple-response, and true-false questions.

Assessments are open book. You may use training manuals (if provided), class notes, product documentation, or online help during the assessment; however, you can't run Anytime Learning videos while in an assessment.

The minimum acceptable score is 80%.

You receive 2 attempts per registration.

Each exam expires 90 days from registration date, so remember to take the exam before it expires.

A complimentary sample Expert Challenge is available for practice. You may take it once.

Training courses

Sage Intelligence Reporting

You can be a superstar in your company after just a few classes offered through Sage University. Take control and produce the reports you need to run your company efficiently. Sage Intelligence uses the Excel you love to create your finished reports. Courses have been developed to meet the type of report you need to create.

Write your own custom financial reports

Start with [Sage Intelligence Reporting: Beginner](#)
Follow up with [Sage Intelligence Reporting: Financials](#)
Or select the [complete learning package](#)
Then get certified

Write your own custom nonfinancial reports

Start with [Sage Intelligence Reporting: Beginner](#)
Follow up with [Sage Intelligence Reporting: Intermediate](#)
Learn even more with [Sage Intelligence Reporting: Advanced](#)
Or select the [complete learning package](#)
Then get certified

Click the above links to learn more about each course.

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 reporting with Sage Intelligence Reporting.

Course Title

Sage 100 - Sage Intelligence Reporting: Beginner

Recommended Prerequisites

None

Duration

This course takes approximately 1 hour to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Understanding the Intelligence interface
- Running pre-existing reports and customize them for your company
- Using the drill-down capability
- Understanding security and setup issues

Assessments

See assessment for:

- Sage Intelligence Reporting – Financials or
- Sage Intelligence Reporting – Non-Financials

Take this course on its own
or purchase our

**Sage Intelligence
Reporting Financials
or Non-Financials
Specialist Package**

for more learning and more
savings!

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.

Course Title

Sage 100 - Sage Intelligence Reporting: Intermediate

Recommended Prerequisite

Sage Intelligence Reporting: Beginner

Duration

This course takes approximately 5 hours to complete.

Learning Method

This course is available as a live online class.

Course Outline

- Creating a report and define report settings
- Adding pivot tables and drill-downs
- Understanding the basic features of the Connector Module
- Defining a new data container
- Automatically emailing and posting reports

Assessment

See assessment for:

- Sage Intelligence Reporting – Non-Financials

Take this course on its own
or purchase our
**Sage Intelligence
Reporting Non-
Financials Specialist
Package**
for more learning and
more savings!

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.

Course Title

Sage 100 - Sage Intelligence Reporting: Advanced

Prerequisites

- Sage Intelligence Reporting: Beginner
- Sage Intelligence Reporting: Intermediate

Duration

This course takes approximately 5 hours to complete.

Learning Method

This course is available as a live online class.

Course Outline

- Creating reports using multiple tables and alternate data sources
- Creating reports that consolidate data from multiple companies
- Building dashboards
- Using advanced data expressions in a data container
- Creating new data connections

Assessment

See assessment for:

- Sage Intelligence Reporting – Non-Financials

Take this course on its own
or purchase our
**Sage Intelligence
Reporting Non -
Financials Specialist
Package**
for more learning and
more savings!

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.

Course Title

Sage 100 - Sage Intelligence Reporting: Financials

Recommended Prerequisites

- Sage Intelligence Reporting: Beginner
- Optional - Sage Intelligence Reporting: Intermediate and Advanced

Duration

This course takes approximately 8 hours to complete.

Learning Method

This course is available as a live online class.

Course Outline

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

Assessment

See assessment for:

- Sage Intelligence Reporting – Financial Specialist

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

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.

Course Title

Sage Intelligence Reporting: Financials - Complete Learning Package for Sage 100 & 500 ERP

Prerequisites

None

Duration

This course takes approximately 9 hours to complete.

Learning Method

This course combines Anytime Learning videos and a live online class.

Course Outline

This training package consists of the following learning packages:

- Sage Intelligence Reporting: Beginner
- Sage Intelligence Reporting: Financials

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Best value for
money!

Sage Intelligence Reporting - Non-Financial Specialist

Overview

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

Course Title

Sage Intelligence Reporting: Non-Financials - Complete Learning Package for Sage 100 & 500 ERP

Prerequisites

None

Duration

This course takes approximately 11 hours to complete.

Learning Method

This course combines Anytime Learning videos and live online classes.

Course Outline

This training package consists of the following learning packages:

- Sage Intelligence Reporting: Beginner
- Sage Intelligence Reporting: Intermediate
- Sage Intelligence Reporting: Advanced

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

**Best value for
money!**

Introduction and Navigation

Overview

This Anytime Learning package is designed for the user new to Sage 100. Learn how to most efficiently navigate in the system and to personalize it for maximum effectiveness.

Course Title

Sage 100 - Introduction and Navigation

Recommended Prerequisites

None

Duration

This course takes approximately 2.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Logging on
- Understanding the desktop
- Using task windows
- Creating custom lookups
- Creating memos
- Using Visual Process Flows
- Printing reports and forms
- Using Business Insights Explorer



General Ledger Specialist

Overview

This Anytime Learning package is designed for customers who are looking for comprehensive training using General Ledger for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in General Ledger.

Course Title

Sage 100 - General Ledger Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 3.25 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Setting up General Ledger
- Defining accounts
- Using allocations
- Entering transactions
- Defining budgets
- Performing periodic processing

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

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

Accounts Payable Specialist

Overview

This Anytime Learning package is designed for customers who are looking for comprehensive training using Accounts Payable for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in Accounts Payable.

Course Title

Sage 100 - Accounts Payable Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 4 hours to complete.

Learning Method

This course is 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

- Setting up Accounts Payable
- Creating and maintaining vendor information
- Entering invoices and making payments
- Entering debit and credit memos
- Making adjustments
- Performing periodic processing including 1099s

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Accounts Receivable Specialist

Overview

This Anytime Learning Package is designed for customers who are looking for comprehensive training using Accounts Receivable for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in Accounts Receivable.

Course Title

Sage 100 - Accounts Receivable Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 4.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Setting up Accounts Receivable
- Creating and maintaining customer information
- Entering invoices and receiving payments
- Entering debit and credit memos
- Making adjustments
- Performing periodic processing

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

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

Bank Reconciliation

Overview

This Anytime Learning Package is designed for customers who are looking for comprehensive training using Bank Reconciliation for their Sage 100 solution. It will give you the necessary knowledge and skills necessary to setup and reconcile your bank accounts.

Course Title

Sage 100 - Bank Reconciliation

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 1 hour to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Setting up Bank Reconciliation
- Setting up Bank Codes
- Enter transactions
- Using Sage Bank Feeds to import transactions
- Using Positive Pay Export to validate checks
- Reconcile bank accounts

Assessment

- This specialty does not offer an assessment for certification.

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

Financial Package

Overview

This Anytime Learning package is designed for customers looking for comprehensive training using Sage 100 financials software. This package will give you the knowledge and skills necessary to set up and process transactions in General Ledger, Accounts Payable, Accounts Receivable, and Bank Reconciliation.

Course Title

Sage 100 - Financials Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 11.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

This training package consists of the following learning packages:

- Sage 100 - General Ledger Complete Learning Package
- Sage 100 - Accounts Payable Complete Learning Package
- Sage 100 - Accounts Receivable Complete Learning Package
- Sage 100 - Bank Reconciliation

Assessments

- This package provides the learning for the General Ledger Specialist, Accounts Payable Specialist, and Accounts Receivable Specialist assessments. Bank Reconciliation does not have a specialist assessment.

Best value!

Also available as
company-wide subscription!

Inventory Specialist

Overview

This Anytime Learning package is designed for customers who are looking for comprehensive training using Inventory Management for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing in inventory control.

Course Title

Sage 100 - Inventory Management Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 2.25 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

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

Course Outline

- Setting up Inventory Management
- Setting up warehouse features
- Creating inventory items and kits
- Receiving, transferring and issuing inventory items
- Performing a physical inventory
- Performing periodic processing

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Sales Order Specialist

Overview

This Anytime Learning package is designed for customers who are looking for comprehensive training using Sales Order for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing using Sales Order.

Course Title

Sage 100 - Sales Order Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 3.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

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

Course Outline

- Setting up Sales Order
- Setting up customers and customer pricing
- Entering all types of sales orders
- Printing picking sheets and shipping labels
- Setting up and entering shipments
- Entering invoices, payments, and adjustments
- Performing periodic processing

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Purchasing Specialist

Overview

This Anytime Learning package is designed for customers who are looking for comprehensive training using Purchase Order for their Sage 100 solution. It will give you the knowledge and skills necessary to setup and perform routine daily and periodic processing using Purchase Order.

Course Title

Sage 100 - Purchase Order Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 3 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

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

Course Outline

- Setting up Purchase Order
- Setting up and maintaining vendors
- Entering all types of purchase orders
- Receiving, returning and invoicing purchased items
- Entering and issuing requisitions
- Performing periodic processing

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Distribution Package

Overview

This Anytime Learning package is designed for customers looking for comprehensive training using Sage 100 distribution software. This package will give you the knowledge and skills necessary to set up and process transactions in Inventory Management, Purchase Order, and Sales Order.

Course Title

Sage 100 - Distribution Specialist: Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 7.25 hours to complete

Learning Method

This course is available as an Anytime Learning course.

Best value!

Also available as
company-wide subscription!

Course Outline

This training package consists of the following learning packages:

- Sage 100 - Inventory Specialist: Complete Learning Package
- Sage 100 - Sales Order Specialist: Complete Learning Package
- Sage 100 - Purchasing Specialist: Complete Learning Package

Assessment

- This package provides the learning for the Inventory Specialist, Sales Order Specialist, and Purchasing Specialist assessments.

Payroll Specialist

Overview

This Anytime Learning Package is designed for customers looking for comprehensive training using Payroll for their Sage 100 solution. It will provide the knowledge and skills necessary to setup and process payroll transactions using Sage 100 Payroll.

Course Title

Sage 100 - Payroll Specialist: Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 3.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Setting Up Payroll
- Setting up taxes
- Entering and maintaining employee information
- Entering and processing payroll
- Printing checks and direct deposit stubs
- Performing periodic processing including Federal and state tax reporting
- Closing the quarter or year including processing W2s
- Using payroll utilities including updating tax files
- Writing payroll reports with Personally Identifiable Information

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

System Administrator Specialist

Overview

This Anytime Learning course is designed for customers who are looking for comprehensive training in system administration for their Sage 100 solution. It will give you the knowledge and skills necessary to perform essential system administrator functions.

Course Title

Sage 100 - System Administrator Complete Learning Package

Recommended Prerequisites

None. The Sage 100 - Introduction and Navigation training is included in this complete learning package.

Duration

This course takes approximately 4.25 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Navigating and customizing the user interface
- Configuring the system
- Creating and managing users and security rights
- Creating and managing companies
- Setting up common system information
- Monitoring and maintaining the system
- Understanding system administrator tools and utilities
- Printing reports and forms
- Creating and using Visual Process Flows
- Using the Business Insights tools to extract business data

Assessment

- This specialty offers an assessment for certification.
- A complimentary sample Expert Challenge is available for practice or testing your knowledge.

Don't need the Introduction and Navigation training?

Already familiar with Sage 100 and just need the System Administrator training, then take the ATL course listed below. Be aware that the certification assessment tests on information from the Introduction and Navigation course as well.

Sage 100 – System Administrator



Job Cost Specialist

Overview

This course is designed for customers who are looking for comprehensive training using Job Cost for their Sage 100 solution. It will give you the knowledge and skills necessary to perform essential job cost functions.

Course Title

Sage 100 - Job Cost Specialist: Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 3.75 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Setting up Job Cost
- Estimating jobs
- Entering and maintaining jobs
- Posting job costs in other modules
- Posting job costs and doing billings directly in Job Cost
- Invoicing jobs using Accounts Receivable
- Posting invoices and costs from Sales Order
- Closing jobs
- Performing periodic processing

Assessment

- This specialty does not offer an assessment for certification.

Program and Data Files Specialist

Overview

This course is designed for customers who are looking for comprehensive training about the Sage 100 program and data files. It will give you the knowledge and skills necessary to effectively use data files in many tasks, such as report writing and Visual Integrator jobs.

Course Title

Sage 100 - Program and Data Files: Complete Learning Package

Recommended Prerequisites

Sage 100 - Introduction and Navigation or familiarity with Sage 100

Duration

This course takes approximately 2.5 hours to complete.

Learning Method

This course is available as an Anytime Learning course.

Course Outline

- Understand different program and file types in Sage 100
- How to find file layout and program file information
- Sage 100 directories and where files are stored
- Business Framework program and data files and how to display and maintain them
- Non-Business Framework program and data files and how to display and maintain them

Assessment

- This specialty does not offer an assessment for certification.

How to sign up

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 your desired 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**.

List of courses

Courses mentioned in this publication are listed below.

ATL = Anytime Learning – video learning

ILT = Instructor-led training – live online classes with virtual labs

<i>Training Course</i>	<i>ATL or ILT</i>
Introduction and Navigation	ATL
General Ledger Complete Learning Package	ATL
Account Payable Complete Learning Package	ATL
Accounts Receivable Complete Learning Package	ATL
Bank Reconciliation	ATL
Financials Complete Learning Package	ATL
Inventory Complete Learning Package	ATL
Sales Order Complete Learning Package	ATL
Purchase Order Complete Learning Package	ATL
Distribution Complete Learning Package	ATL
Payroll Specialist: Complete Learning Package	ATL
System Administrator Complete Learning Package	ATL
Job Cost Specialist: Complete Learning Package	ATL
Program and Data Files: Complete Learning Package	ATL
Sage Intelligence Reporting: Beginner	ATL
Sage Intelligence Reporting: Intermediate	ILT
Sage Intelligence Reporting: Advanced	ILT
Sage Intelligence Reporting: Financials	ILT
Sage Intelligence Reporting: Complete Financial Package	ATL & ILT
Sage Intelligence Reporting: Complete Non-Financials Package	ATL & ILT