

# COURSE OUTLINE

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## Introduction to Sage 300

*Last Updated: 5 August 2016*



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## A. Course Outlines

### 1. Introduction to Sage 300

#### Course description

The Introduction to Sage 300 course has been designed for new users – people who have never worked on Sage 300 (formally known as Sager ERP Sage 300) core modules before, and needs to understand the overall workings and mythology of Sage 300 as an ERP system, and also for students that needs to know the basics of accounting and how this incorporates into Sage 300.

#### Course duration

This course is scheduled for three days from 9:00 till 16:00.

#### Course pre-requisites

- Computer/Windows literate
- Basic MS Office understanding

#### Documentation

The following documentation is included with the course

- Sage 300 user guide
- User competency assessment
- Certificate of attendance

#### Who should attend?

- New/basic Sage 300 users
- Job seekers
- Skill development students

#### Topics covered

- Introduction to basic accounting principals
- Introduction to SQL Server
- Navigation through SQL server 2005,2008 r2
- Database creation in SQL 2005,2008
- Backups in SQL
- Restore of databases in SQL
- Creation of open data base connections in administrative services
- Test the connections
- Create databases for companies in Sage 300 (formally known as Sage ERP Sage 300) database set up
- Activate sub modules
- Accounting principles relating to Sage 300 processes
- Setup options in Sage 300 core modules
- The effect of user rights on the work ability of Sage 300
- To understand periods in Sage 300
- Adjustment and closing periods
- Setting up of multi-currency companies
- Planning before creating



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- Options for General Ledger, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Orders, Order Entry, Peresoft Cashbook
- The connection between Crystal, Financial report writer, Insight reporting, business Intelligence and Sage 300
- Reasons for Purchase Orders and Order Entry
  - Effect on Inventory Control
  - Effect on balance sheets
  - Effect on month ends and year ends.
- Month and year end procedures
  - Year-end step by step
  - Reports essential to complete the process
- Changing the user interface
- Crystal Reports
  - Where to find these reports
  - Process to create custom reports
- Financial Reports
  - Storing your custom reports
  - How to write your own reports
- Work station set up
- Data on server
  - Benefits
  - Disadvantages
- Program files available locally
  - Benefits
  - Disadvantages
- How to plan your General Ledger account number creation
- How to create
  - Cost centres
  - Segments
  - Segment codes
- Deleting batches
  - Effect on the system
  - How to reverse
  - Return to drawer cheques
  - Effect on Accounts Receivable
- Understanding Sage 300 tables
- Understanding Universal Network Conventions (UNC)
- Understanding map drives, why UNC's are better?
- Troubleshooting
- All import and export functions
- Navigate through Peresoft products
- What is a batch formatted system?
- Clearing accounts
  - Effect on the system
  - Effect on the balance sheet



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- Control Accounts
  - Description
  - Effect on balance sheet
  - Effect on month ends and year ends



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## B. Contact Details

### 1. Location for training

We have training facilities in Centurion or training can be done on-site on request.

Physical Address:

Centurion  
1001 Clifton Avenue  
Lyttelton Manor  
Centurion

### 2. For bookings or more information

For bookings or more information please feel free to Marili van Niekerk us at 012 640 2626 or e-mail [training@acctech.biz](mailto:training@acctech.biz)

For the latest event schedule visit our training page on [www.acctech.biz](http://www.acctech.biz)



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