Caron Business Solutions

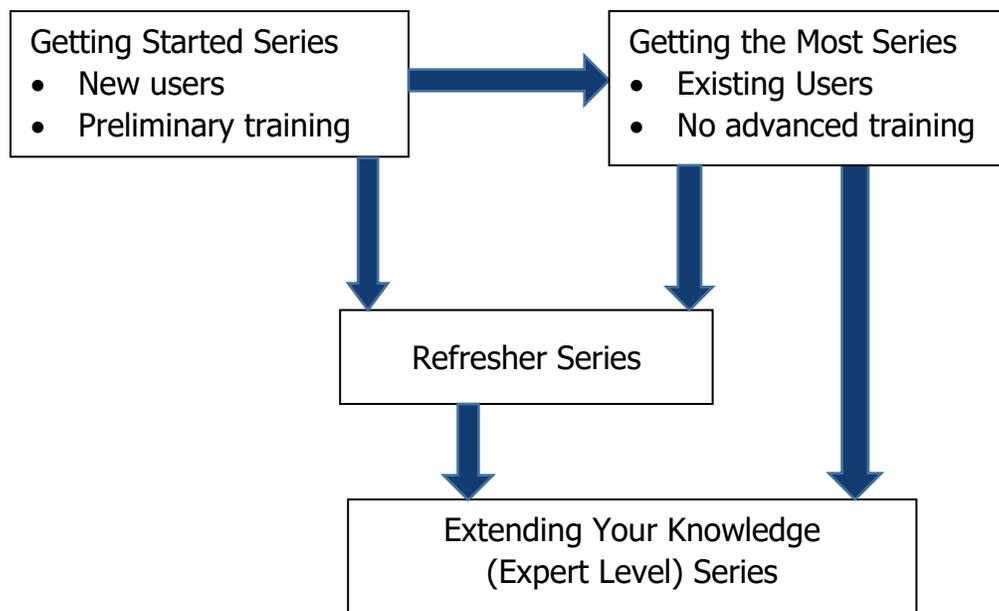# Course Catalogue

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Our Learning Path

Our structured learning path framework utilizes a building block approach. The learning path consists of the following series of training courses:

- Getting Started Series,
- Getting the Most Series,
- Refresher Series,
- Extending Your Knowledge Series.

Each of these is explained below. All courses in these series have clear objectives and provide abundant opportunity for self-assessment to ensure that the learning experience is optimal.

Getting Started Series

The courses in the Getting Started Series are specifically designed for new Sage 300 users. We often offer the courses in this series during the Preliminary Training phase of our implementation projects.

Our instructors teach basic features of Sage 300 modules and much more. They also teach users how to effectively utilize the new skills they acquire. By providing students with hands-on exercises and a step-by-step approach, we coach students how to set up procedures, how to enter and post transactions, how to use key reports and inquiries,

proper periodic processing procedures and we provide tips to speed data entry. The Getting Started Series is a pre-requisite for the Getting the Most Series, unless you have a minimum of 6 months of Sage 300 experience.

Getting the Most Series
The courses in this series are intended for individuals with some relevant experience with Sage 300 but not necessarily any advanced training. This series is a nice next step from the Getting Started Series.

An important part of learning comes from on-the-job-training and work experience. We've all heard the old saying "experience is the best teacher" and there is some truth to that. In reality, the combination of on-the-job experience and formal training courses is the most effective combination to ensure users learn Sage 300 effectively.

Refresher Series
In our experience, many Sage 300 users receive some training when the product is first implemented. The implementation of new software is stressful and, because implementation projects have deadlines and budget constraints, training is sometimes limited in scope. During implementation projects, users attempt to absorb as much as they can in a short duration while trying to balance their daily workloads. This diverted attention has a consequence and users will only retain 40-60% of the knowledge they're given. These users would make excellent candidates for the Refresher Series.

Furthermore, chances are your business has evolved since the original implementation. It may be time for your company to upgrade its processes to meet the needs of growth. The Refresher Series will help your users strengthen their knowledge on key tasks and new program features. With stronger knowledge of the software, the users can be more efficient at their jobs.

The Refresher Series empowers employees to improve their business methods. With clear knowledge of how the system functions, they can make informed decisions on how to improve processes.

A quick way to determine whether users need Sage 300 refresher training is to simply ask them, "Why do you do it that way?" If their response is "Because, I was told to do it that way," it is time to schedule them for a refresher!

Extending Your Knowledge (Expert Level) Series
Before selecting this series you should have a firm grasp of the basics of Sage 300. By the end of this series of courses, you will have mastered the advanced features and

various functions of this software. By attending the Extending Your Knowledge Series you will also gain a broader understanding of different data tables and how they are connected. During these courses, our instructors emphasize the extended functionality of the Sage 300 modules with the help of add-on products. As an expert, you will acquire extensive knowledge and skills in a concentrated area.

Being an expert not only means possessing the skills and knowledge but also exercising them appropriately in real life scenarios. You will be able to combine a general understanding of your business process with an in-depth understanding of the software. In-depth understanding means having sufficient knowledge of accounting theory and practice to be able to influence the direction that an organization or project takes when planning, implementing and executing in relation to the organizations activities and software.

Course Descriptions

In the following section, we have described the individual courses that form each of the training series described above. A single course may be included in different series. The differences in how the course is delivered in each of our training series are explained below.

Sage 300 – System Manager

This course is designed for application administrators and project teams who are responsible for the setup, configuration and maintenance of the Sage 300 application within their organization. Other groups who benefit from this course include business analysts and business process owners. The System Manager module is the hub from which all other modules operate and affects nearly everything you do in your Sage 300 system, from establishing security to searching for a record within a file. The System Manager functionalities are divided into two broad areas; Administrative Services, which defines security settings and allows users to copy or back up datasets, and Common Services, which defines fiscal calendar options, bank services, tax services and currency settings for the company. With hands-on practice, you will learn techniques and best-practices for importing and exporting data, as well as how to set up user-friendly Visual Process Flows to ensure all Sage 300 users are able to quickly and easily interact with the system.

The course is part of the following series:
Getting Started Series – full day course
Getting the Most Series – full day course
Refresher Series – half day course
Extending Your Knowledge Series – certain specific topics will be covered

Sage 300 – General Ledger

Getting Started Series – General Ledger
Duration: One Day   Price: $425.00

The course provides an overview and introduction to the general ledger by using a hands-on approach with simulated source documents. It takes attendees step-by-step through the procedures for setting up the General Ledger, followed by transaction by transaction processing covering the concepts and techniques needed to use the General Ledger. Attendees will be given plenty of opportunity to explore and practice these techniques throughout the course.

Getting The Most Series – General Ledger
Duration: One Day   Price: $425.00

This course is designed for individuals who already have work experience but are lacking formal training and would like to expand their opportunities. The objective of the program is to provide attendees with the knowledge required to optimize Sage 300 – General Ledger.

Refresher Series – General Ledger
Duration: Half Day   Price: $250.00

This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. This is best suited for those who would like to quickly review and update their skills, learn about the new module features and to increase their knowledge and productivity.

Extending Your Knowledge Series – General Ledger
Duration: One Day   Price: $495.00

Pre-requisites are Getting Started Series and Getting The Most Series – General Ledger courses. This course explores topics such as the setup and usage of budgeting, multicurrency, intercompany, consolidated accounting and cash flow management, some of these features will be handled by add-on products. You will also gain an understanding of the tables and data flow of the General Ledger module. By the end of this advanced course, one will have mastered more complex features and functions of the General Ledger.

Sage 300 – Accounts Payable

Getting Started Series – Accounts Payable
Duration: One Day   Price: $425.00

This course provides an introduction and overview to the Accounts Payable using a hands-on approach with simulated source documents. Attendees will be given plenty of opportunity to explore and practice these techniques throughout the course.

Getting The Most Series – Accounts Payable
Duration: One Day   Price: $425.00

This course is designed for the Finance and Accounts Payable department staff members who have some practical experience working with Sage 300 – Accounts Payable module but lack formal training. It is end-user focused, encompassing daily tasks such as preparing invoices, payment processing, making inquiries and compiling month end reports. Our expert Sage 300 instructor will guide you through each AP process step-by-step. Along the way, the instructor will recommend tips, best practices, and key points to optimize your use of Sage 300.

Refresher Series – Accounts Payable
Duration: Half Day   Price: $250.00

This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to quickly update their skills, learn module new features and to increase their knowledge and productivity.

Extending Your Knowledge Series – Accounts Payable
Duration: One Day   Price: $495.00

Pre-requisites are Getting Started Series and Getting The Most Series – Accounts Payable courses. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Accounts Receivable

Getting Started Series – Accounts Receivable
Duration: One Day   Price: $425.00

The course explores the accounting cycle and the processes required to enter invoices and receive payments from customers. Learn how to perform functions such as credit notes, prepayments, small balance write off, print customer statements. You will also learn to set terms for calculating document discount dates and due dates and use

balance forward and open-item statements. This course is intended for anyone wanting to learn basic features and to develop a working knowledge of typical daily operations.

Getting The Most Series – Accounts Receivable

Duration: One Day   Price: $425.00

This course is designed for the Finance and Accounts Receivable department staff members who have some practical experience working with Sage 300 – Accounts Receivable module but lack formal training. It is end-user focused, including all day to day tasks such as invoice and receipt processing, making inquiries and running reports together with month end procedures. Your instructor will guide you through each AR process step-by-step. Along the way, the instructor will recommend tips, best practices, and key points are shared to make sure you use Sage 300 most effectively.

Refresher Series – Accounts Receivable

Duration: Half Day   Price: $250.00

This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Extending Your Knowledge Series – Accounts Receivable

Duration: One Day   Price: $495.00

Pre-requisites are Getting Started Series and Getting The Most Series – Accounts Receivable courses. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Canadian Payroll

Getting Started Series – Canadian Payroll

Duration: One Day   Price: $425.00

This course provides an introduction and overview to the Payroll module using hands-on exercises with simulated source documents. In just one day, you'll learn how to set up your payroll system, including defining payroll parameters, pay rates, entering employees, time card entry and generating payroll checks. By taking advantage of the power and usability in Payroll, you can increase productivity, save processing time and utilize different reporting options. Attendees will be given lots of opportunity to explore and practice these techniques throughout the course.

Getting The Most Series – Canadian Payroll
Duration: One Day   Price: $425.00
This course is designed for individuals who already have work experience but are lacking formal training and would like to expand their opportunities. Upon completion attendees will master the skills necessary to function at a high level in the payroll / accounting office in a small to large organization.

Refresher Series – Canadian Payroll
Duration: Half Day   Price: $250.00
This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Extending Your Knowledge Series – Canadian Payroll
Duration: One Day   Price: $495.00
Pre-requisites are Getting Started with Sage 300 – Canadian Payroll and Getting the Most from Sage 300 – Canadian Payroll courses. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Inventory Control

Getting The Most Series – Inventory Control
Duration: One Day   Price: $425.00
Inventory Control is a comprehensive multi-location inventory management system that provides effective management of stock levels and inventory transactions. It forms the core of Sage 300's operations management suite of products, and allows users to enter transactions quickly and easily for the movement and tracking of inventory items. This course also teaches users the basic setup as well as how to enter transactions directly in Inventory Control.

Refresher Series – Inventory Control
Duration: Half Day   Price: $250.00
This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Extending Your Knowledge – Inventory Control
Duration: One Day   Price: $495.00
Pre-requisite: Getting the Most from Sage 300 – Inventory Control.
We will demonstrate extended functionality with the use of add-on products. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Order Entry

Getting The Most Series – Order Entry
Duration: One Day   Price: $425.00
This course takes you step-by-step through the procedures on how to enter your orders and sales returns, how to print invoices, credit/debit notes, quotes, order confirmations, picking slips, and shipping labels. You will also learn how to track transaction details and sales information on the screen and on printed reports.

Refresher Series – Order Entry
Duration: Half Day   Price: $250.00
This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Extending Your Knowledge Series – Order Entry
Duration: One Day   Price: $495.00
Pre-requisite: Getting the Most from Sage 300 – Order Entry.
We will demonstrate extended functionality with the use of add-on products. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Purchase Orders

Getting The Most Series – Purchase Orders
Duration: One Day   Price: $425.00
Learn how to setup and establish purchase order defaults, and how to perform routine purchase order entry, receive goods, enter invoices with additional charges and return goods. Through hands-on training, you will master how to enter active, standing and future purchase orders, quickly consolidate items from multiple purchase orders on a

single receipt, create one purchase order from multiple requisitions and select the requisition details by vendor number as well as many other tips and tricks!

Refresher Series – Purchase Orders
Duration: Half Day   Price: $250.00
This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Extending Your Knowledge Series – Purchase Orders
Duration: One Day   Price: $495.00
Pre-requisite: Getting the Most from Sage 300 – Purchase Order.
We will demonstrate extended functionality with the use of add-on products. By the end of this session, one will have mastered the advanced features and gain insight on the tables and data flow offered in the module.

Sage 300 – Project and Job Costing

Getting The Most Series – Project and Job Costing
Duration: Two Days   Price: $850.00
This two-day course is intended for people like project managers and accounting staff in construction, job service, and other professional industries who require a time-and-material, fixed price or cost-plus systems. This course delivers the tools necessary to manage the simplest to most complex contract or job. It makes the estimating, tracking, costing, and billing of projects easy and manageable, simplifying cost control and planning. With the powerful features of Project and Job Costing you can identify potential issues and determine success factors for any project. The automated billing features in this job cost accounting software streamline customer invoicing, reducing the time spent managing this process.

Refresher Series – Project and Job Costing
Duration: One Day   Price: $425.00
This course is designed for those who are upgrading from older versions of Sage 300 – or users who have been using the software for years with limited time spent on retraining. Attendees will be able to update their skills, learn about the new features of the module to increase your knowledge and productivity.

Sage 300 – Financial Reporter

Duration: One Day   Price: $425.00

Learn the reporting capabilities of the Financial Reporter and how to produce financial statements from the data stored in the general ledger. Through hand-on exercises you will be able to create your own financial statements.

Sage 300 – Intelligence Reporting

Getting Started Series – Intelligence Reporting

Duration: One Day   Price: $425.00

This course is designed to give you a comprehensive overview of Sage Intelligence and increase your understanding of Microsoft Excel's business reporting features. Learn the basic functions of the Report Manager module, including organizing reports, creating reports, saving formats, creating union reports and summarizing or grouping data in a report.

Sage 300 Intelligence Financial Reporting

Duration: One Day   Price: $425.00

You now have a good knowledge of Sage Intelligence and are ready to design your reports using the Layout Generator and the Task Pane, in the Report Designer.

Sage 300 Intelligence Non-Financial Reporting

Duration: One Day   Price: $425.00

Pre-requisite: Getting the Most from Sage 300 – Intelligence reporting or have a basic working knowledge of the Report Manager module. Learn how to create dashboards, protect your Microsoft Excel workbook, use add-ins, schedule a report, export and import reports, distribute reports and allow report templates to be accessed by multiple people. We will also share our best practice reporting guidelines with you.

Refresher on Sage 300 - Financials (System Manager, General Ledger, Accounts Payable and Accounts Receivable)

Duration: One Day   Price: $575.00

This course is designed for those who are upgrading from older versions of Sage 300 – System Manager, General Ledger, Accounts Payable and Accounts Receivable to the newest version of the modules and would like to quickly review and update their skills, learn about the new features of the financial modules to increase your knowledge and productivity.

Refresher on Sage 300 Accounts Payable and Purchase Order

Duration: One Day   Price: $425.00

This course is designed for those who are upgrading from older versions of Sage 300 – Accounts Payable and Purchase Order to the newest version of the module and would like to quickly review and update their skills, learn about the new features of the module to increase your knowledge and productivity.

Refresher on Sage 300 Accounts Receivable and Order Entry

Duration: One Day   Price: $425.00

This course is designed for those who are upgrading from older versions of Sage 300 – Accounts Receivable and Order Entry to the newest version of the module and would like to quickly review and update their skills, learn about the new features of the module to increase your knowledge and productivity.

Getting started with Sage 300c

Introduction and Overview
Learn how to sign onto, navigate through, and customize the Sage 300 desktop and web screens.

General Ledger
You will learn how to create accounts, enter journal entries, and post a GL batch.

Accounts Payable
You will be able to describe the invoice entry workflow, create and modify vendors, enter invoices, and print an invoice posting journal.

Accounts Receivable
You will be able to describe invoice entry workflow, create and modify customers, enter invoices, and print an invoice posting journal.

Inventory Control
Learn how to create items and enter receipts.

Order Entry
You will be able to describe the order types, how to enter quotes and sales orders.

Purchase Order
Learn how to create purchase orders, receipts, and invoices.

Microsoft Excel

Getting the Most from Microsoft Excel 2013
This one-level course covers all the essentials of Microsoft Excel 2013. Topics covered include the new Flash Fill feature, using formulas and functions, inserting PivotTables and PivotCharts, and customizing the interface. Material is also included on how to format text, data, and workbooks; insert art and objects; and chart data.

Getting the Most from Microsoft Excel 2016
The first course in our Microsoft Excel 2016 series will give students a solid grasp of the basics, with lessons on:

- Getting started with Excel 2016.
- Performing calculations
- Modifying a Worksheet
- Formatting a Worksheet
- Printing workbook contents
- Managing large workbooks
- Customizing the Excel environment

Pricing

Getting Started with Sage 300 One Day	Getting the Most from Sage 300 One Day	Refresher Sage 300 Course Half Day	Extending your knowledge (Expert level) One Day
$425.00	$425.00	$250.00	$495.00

Regular pricing (+GST)

- One-day Sage 300 course Getting Started and Getting the Most series - $425.00
- Refresher Sage 300 half day course - $250.00
- Extending your knowledge (Expert Level) - $495.00
- Bundle one day refresher Sage 300 (System Manager, General Ledger, Accounts Payable and Accounts Receivable) - $575.00

Volume pricing (+GST)

- If the same attendee takes more than two courses they are entitled to a total discount of two hundred dollar from the combined total.
- $6,000.00 per year entitles your company to unlimited amount of courses for up to five employees.

Talk to a Training Advisor

Find the Training that Suits Your Needs

Our Training Advisor will be happy to analyze your needs and advise on the best training options for you and your organization. Please fill out the form and we will reach out to you. If you need immediate assistance, you can also call the phone 604 291 6311. See more at: https://www.caronbusiness.com/sage-classroom-training/