

# sage 200 Evolution

## Training Catalogue



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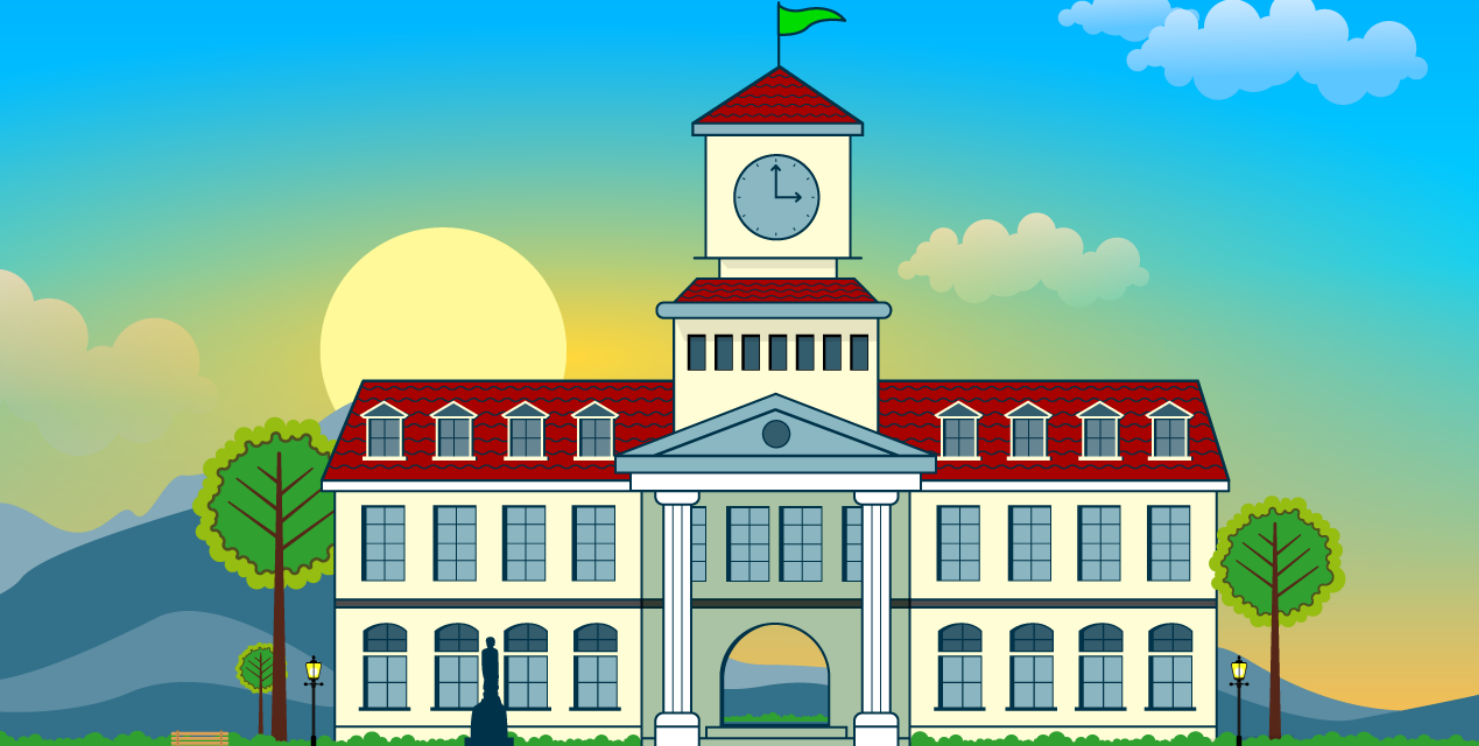
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# Build my skills on Sage 200 Evolution: Learning that helps you succeed

Whether you are a new Sage 200 Evolution 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.

## Instructor-Led Virtual

*Designed for users who want a step-by-step how-to. With this objective in mind, you get to practice using the software, while completing exercises.*



## Private Training

*Sessions are curriculum and training plans designed specifically for your organization delivered onsite or online.*

## Job Role

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

## User Certifications

*Allows you to stand out from the crowd and be recognised for your knowledge by obtaining a certification with Sage.*

## eLearning / eBooks



*Self-paced recorded videos available whenever you are. Ideal for learning new concepts or acquaint new hires with basics of Sage 200 Evolution.*



# Sage Learning Services

Training when **you** need it

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

- Hands-on Instructor-Led Virtual/In-Class 
- Self-Paced eLearning/eBooks 
- Private Customised Training
- Role Based Learning Paths
- Badging and Certification

*New products  
and updates*

*New hires*

*New roles*

*Next level of  
skills*

*Implementation*

sage 200 Evolution

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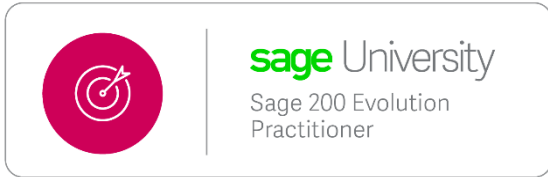
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# Badges and Certification (Coming Soon)

Badges recognise 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!

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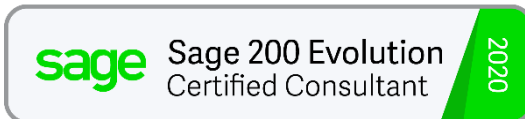
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Earn the ultimate Sage learning achievement

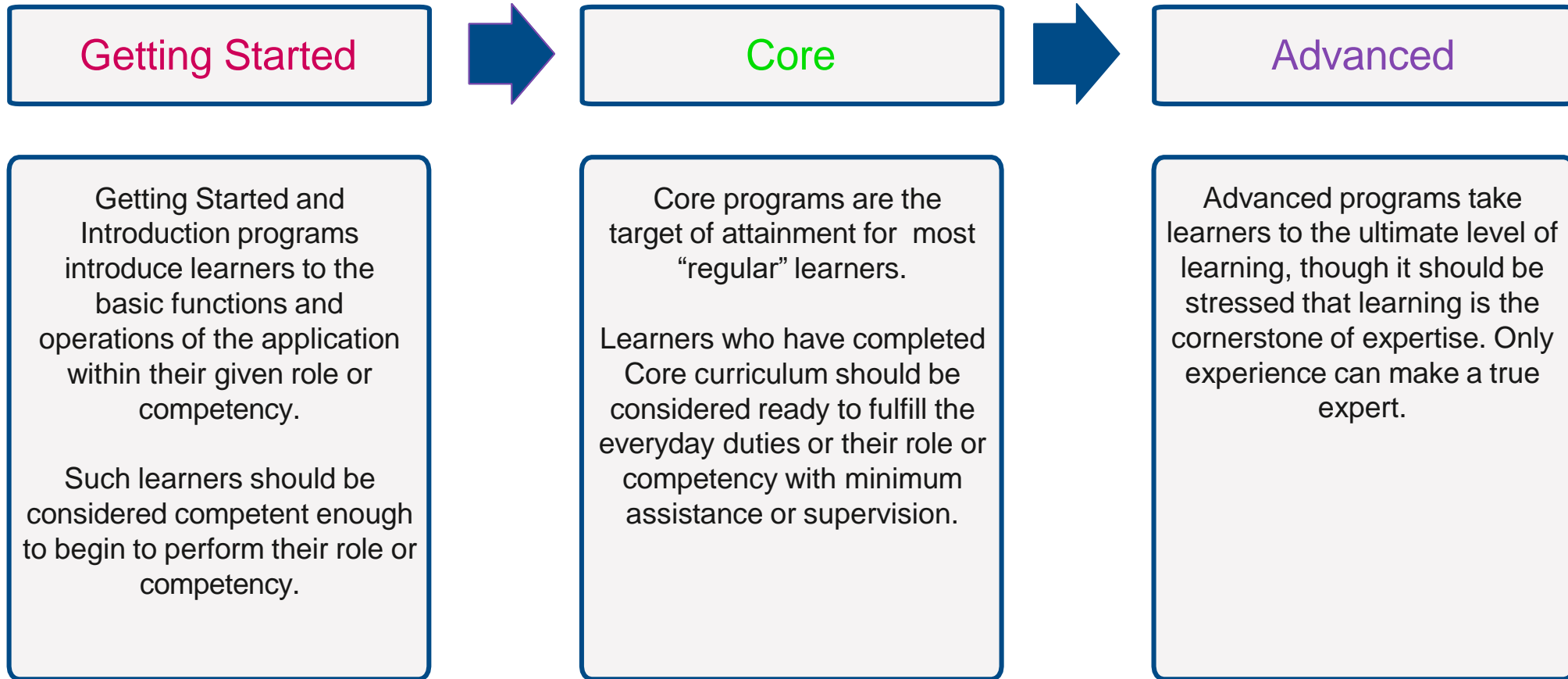


Prove your skills to employers by passing a certification exam and earning the certification for your role. Certifications are available for multiple roles; for example, Certified Consultant. Earning your certification is version-specific, year-specific, does not expire, and includes certification logos and a media toolkit to share your achievement.



# Stages of Learning

The Sage 200 Evolution Curriculum has 3 stages to help you navigate straight to the knowledge you need: Getting Started, Core, and Advanced.



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## Bookkeeping Fundamentals Course

This comprehensive training program covers the basic bookkeeping terms and concepts. This also shows how to deal with basic bookkeeping documents and how to use them in a manual paper-based accounting system.

The course includes the following content:

- Bookkeeping Introduction
- Value Added Tax (VAT)
- Source Documents
- Inventory
- Subsidiary Journals
- The General Ledger
- The Trial Balance
- The Statement of Income
- The Statement of Financial Position
- Bank Reconciliation

	Classroom	2 Days	<a href="#">Book Now</a>
	e-Learning	8 hours	



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Sage Bookkeeping  
Essentials

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## Learning Unit 1: Practitioner Course



This comprehensive training course is a step by step course on how to set up your environment, process transactions and generate reports using the Sage 200 Evolution core modules. The course includes the following content:

This course will teach you to install, register, navigate and maintain your Sage 200 Evolution software.

Maintaining your software includes creating common databases, backups and masterfiles.

The course will also teach you how to navigate within the software using the system tree, main menu and available shortcuts.

- General Ledger module
- Accounts Receivable module
- Accounts Payable module
- Inventory module
- Order Entry module
- Bank statement Manager
- Tax module
- Year End processing

	Classroom	5 Days	<a href="#">Book Now</a>
	e-Learning	24 hours	



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Sage 200 Evolution  
Practitioner




## Learning Unit 2: Product Consultant


This comprehensive training course will give you an opportunity to familiarise yourself with the different Sage 200 Evolution add-on modules. The course includes the following content:

This course will explain the detailed setup, processing and reporting aspects of the Sage 200 Evolution add-on modules.

The add-on modules available in this course:

- Annuity Billing
- Bank Manager
- Bill of Materials and Manufacturing
- CRM
- Debtors Manager
- Delivery Management
- Fixed Assets
- Linked Accounts
- Lot Tracking
- Multi-currency
- Multi-warehousing
- Point of Sale
- Pricing Matrix
- Procurement
- Sales Force Automation
- Serial Number Tracking
- Voucher Management

	Classroom	5 Days	<a href="#">Book Now</a>
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	<b>sage</b> University Sage 200 Evolution Product Consultant
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## Learning Unit 4: Maintenance Technician

This comprehensive training course covers the maintenance activities for the Sage 200 Evolution environment. The course includes the following content:

This course will teach you how to set up, configure and maintain the Sage 200 Evolution software environment.

- Prepare your company for Sage 200 Evolution.
- Understand the different elements of networking.
- Setting up the Freedom Service.
- Central Search and dashboards.
- The Sage 200 Evolution import/export tool.
- The diagnostic tool.
- Data distribution services.
- The configuration, setting up and use of Sage Pay.
- Using the Customer Zone and Sage Online Tools.
- Setting up the Outlook add-in.
- Upgrading your databases.

### Reports


- Identify the different reports.
- Generate reports.
- Customise reports.
- Import reports.


### Partner to Evolution Conversion

- Convert from Sage Partner to Sage 200 Evolution (Old Conversion).
- Convert from Sage Partner to Sage 200 Evolution (New Conversion).

### System Audit Manager

- Have an overview of the System Audit Manager.
- Know how the System Audit Manager works.

	Classroom	2 Days	<a href="#">Book Now</a>
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	<b>sage</b> University Sage 200 Evolution Maintenance Technician
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# Add-on Module Courses

## Annuity Billing Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Annuity Billing add-on module. The course includes the following content:



- Set up Annuity Billing defaults
- Annuity Billing configurations
- Setting Annuity Billing for a supplier
- Posting payments
- Annuity Billing with recurring invoices
- View annuity transactions
- Generate reports

	Classroom	½ Day
	e-Book	1 ½ Hours

## Bank Manager Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Bank Manager add-on module. The course includes the following content:

- Download your bank statements
- Open and Navigate in Bank Manager
- Set up Bank Manager
- Add Mappings
- Split Transactions
- Transfers

	Classroom	½ Day
	e-Learning	3 Hours





# Add-on Module Courses

## Bill of Materials and Manufacturing Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Bill of Materials and Manufacturing add-on module. The course includes the following content:



- Bill of Materials Setup
- Create component items
- Create bill items
- Processing transactions
- Manufacture bills
- Manufacture bill items on invoices
- Generate reports

	Classroom	½ Day
	e-Book	3 Hours

## Contact Management (CRM) Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Contact Management add-on module. The course includes the following content:

- Setup the Contact Management module
- View an incident history
- Set up agents
- Document list and knowledge base
- View reports and charts

	Classroom	1 Day
	e-Book	4 Hours





# Add-on Module Courses

## Debtors Manager Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Debtors Manager add-on module. The course includes the following content:



- Install Debtors Manager
- Open Debtors Manager
- Set up Debtors Manager
- Process in Debtors Manager
- Generate reports

	Classroom	½ Day
	e-Book	3 Hours

## Delivery Management Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Delivery Management add-on module. The course includes the following content:

- Understanding delivery management
- Maintenance
- Processing transactions
- Enquiries
- Reports

	Classroom	½ Day
	e-Book	3 Hours





# Add-on Module Courses

## Fixed Assets Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Fixed Assets add-on module. The course includes the following content:



- Set up the fixed assets defaults
- Set up the fixed assets module
- Processing asset transactions
- Perform enquiries
- Generate reports

	Classroom	½ Day
	e-Book	3 Hours

## Job Costing Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Job Costing add-on module. The course includes the following content:

- Set up the Job Costing module
- Process job costing transactions
- Perform enquiries
- Generate reports

	Classroom	½ Day
	e-Book	3 Hours





# Add-on Module Courses

## Linked Accounts Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Linked Accounts add-on module. The course includes the following content:



- Introduction to the module
- Link customers and branches
- Reports

	Classroom	½ Day
	e-Book	1 Hour

## Lot Tracking Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Lot Tracking add-on module. The course includes the following content:

- Introduction to the module
- Processing inventory in lots
- Goods received voucher and invoice processing
- Processing a customer invoice
- Lot tracking transfer
- Enquiries and reports

	Classroom	½ Day
	e-Book	3 Hours





# Add-on Module Courses

## Multi-Currency Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Multi-Currency add-on module. The course includes the following content:



- Create foreign currency and exchange rates
- Maintain the multi-currency module
- Create foreign customers and suppliers
- Processing foreign currency inventory
- Cashbook processing and allocations

	Classroom	½ Day
	e-Book	3 Hours

## Multi-Warehousing Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Multi-Warehousing add-on module. The course includes the following content:

- Set up warehouse defaults
- Create a warehouse
- Create warehouse items
- Set up agents
- Process warehouse transactions
- Perform enquiries and generate reports

	Classroom	½ Day
	e-Book	3 Hours





# Add-on Module Courses

## Point of Sale Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Point of Sale add-on module. The course includes the following content:



- Set up the point of sale defaults
- Create devices and tills
- Process transactions
- Perform enquiries and generate reports

	Classroom	½ Day
	e-Book	3 Hours

## Pricing Matrix Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Pricing Matrix add-on module. The course includes the following content:

- Create volume discounts for suppliers
- Create a discount matrix for suppliers
- Create volume discounts for customers
- Create a discount matrix for customers

	Classroom	½ Day
	e-Book	3 Hours





# Add-on Module Courses

## Serial Number Tracking Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Serial Number Tracking add-on module. The course includes the following content:



- Set up the serial numbers
- Process serial number transactions
- Perform enquiries
- Generate reports

	Classroom	½ Day
	e-Book	3 Hours

## Voucher Management Course

This comprehensive training course will give you an opportunity to familiarise yourself with the Sage 200 Evolution Voucher Management add-on module. The course includes the following content:

- The Voucher Management concept
- Masterfiles and maintenance functions
- Processing payment and receipt vouchers
- Enquiries
- Reports

	Classroom	½ Day
	e-Book	3 Hours