

# Abstract

## **Take the shortcut with Sage 300:**

Solve your everyday business problems with tips and tricks on maximizing on all Sage 300 features



ENABLE | EDUCATE | ENLIGHTEN

# Sage 300 Tips, Tricks and Enhancements

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Field Sales Engineer III, Sage

The logo for Sage Sessions is centered on a dark blue background. The word "sage" is in a bright green, lowercase, sans-serif font. The word "sessions" is in a white, lowercase, serif font. The background features abstract geometric shapes in various shades of blue, including a light blue triangle in the top left and a light blue trapezoid in the bottom right.

sage sessions

# Take the shortcut with Sage 300

Download link:

<http://bit.ly/300tipsandtricks>

# Agenda

- Learning Objectives
- Tips & Tricks – Microsoft Windows
- Tips & Tricks – Microsoft Office
- Tips & Tricks – Sage 300
- Resources

# Learning Objectives

After participating in this session, you will be able to:

- Be more efficient with the Windows OS & Excel
- Configure Sage 300 to enhance productivity of every day tasks
- Make the Sage 300 experience a more enjoyable one

# Ancient Proverb

Give a man a fish, you fed him for a day...

...Teach a man how to fish, you've fed him for the rest of his days...



# Tips & Tricks


## Microsoft Windows

# Windows Tips & Tricks – continued...

- CTRL+ C = Copy
- CTRL+ X = Cut
- CTRL+ P = Paste
- SHIFT + DELETE = Delete selection immediately, without moving the item to the Recycle Bin.

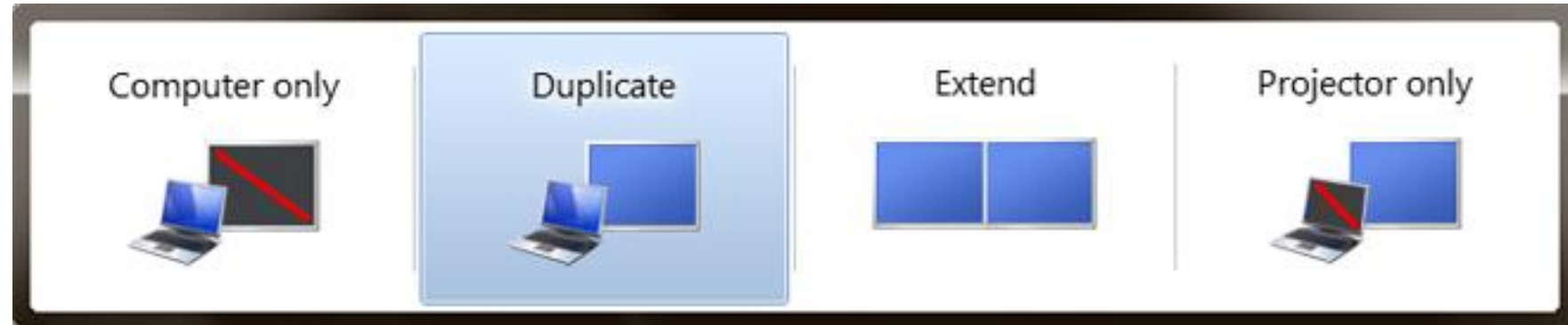
<https://support.microsoft.com/en-ca/help/12445/windows-keyboard-shortcuts>

# Windows Tips & Tricks

- Windows key = 
- Window key + D = Show Desktop
- Window key + E = File Explorer
- Windows key + Tab = The new ALT + TAB

# Windows Tips & Tricks – continued...

- Windows key + P = Easy Display Switcher



- Computer only is the default option—and the name says it all.
- Duplicate clones your screen to a connected secondary display, monitor or projector.
- Extend expands the desktop so you can make room for extra windows.
- Projector only turns off your laptop's LCD and turns the projector into your monitor.

# Tips & Tricks

## Microsoft Office

# Microsoft Office Tips and Tricks

## Outlook:

- Copying an Email to make an appointment –
  - Open an email
  - Select the “Reply all by Meeting” button
  - And then setup your meeting.
- Results: This will copy the contents of the email into your meeting and everyone on the reply will be invited to the meeting.

# Microsoft Office Tips and Tricks

## Excel:

- **Column width** – Double click on the Column divider, or highlight multiple columns and then double click on the column divider. In example one the single column snaps to the width of the largest row in the column, in second example all selected columns snap to width of largest row in column.
- **Copying values all the way down a cell** – highlight cell, double click on the square little box bottom right corner of cell to copy down that cell value or formula. This will copy down to the bottom of the last row to the left of the cell. So if you have 20 continuous rows the formula will be copied down to the end of that list.

# Microsoft Office Tips and Tricks

Excel – continued:

Cool Formulas:

- Concatenate – To bring multiple fields together inside one cell.
- HLookup & VLookup – For looking up values and returning a related value.
  - HLookup – Horizontal Lookup.
  - VLookup – Vertical Lookup.



# Demonstration

## Formatting:

- Column width
- copy values

## Excel formulas

- Concatenate
- VLookup

# Tips & Tricks

## Sage 300

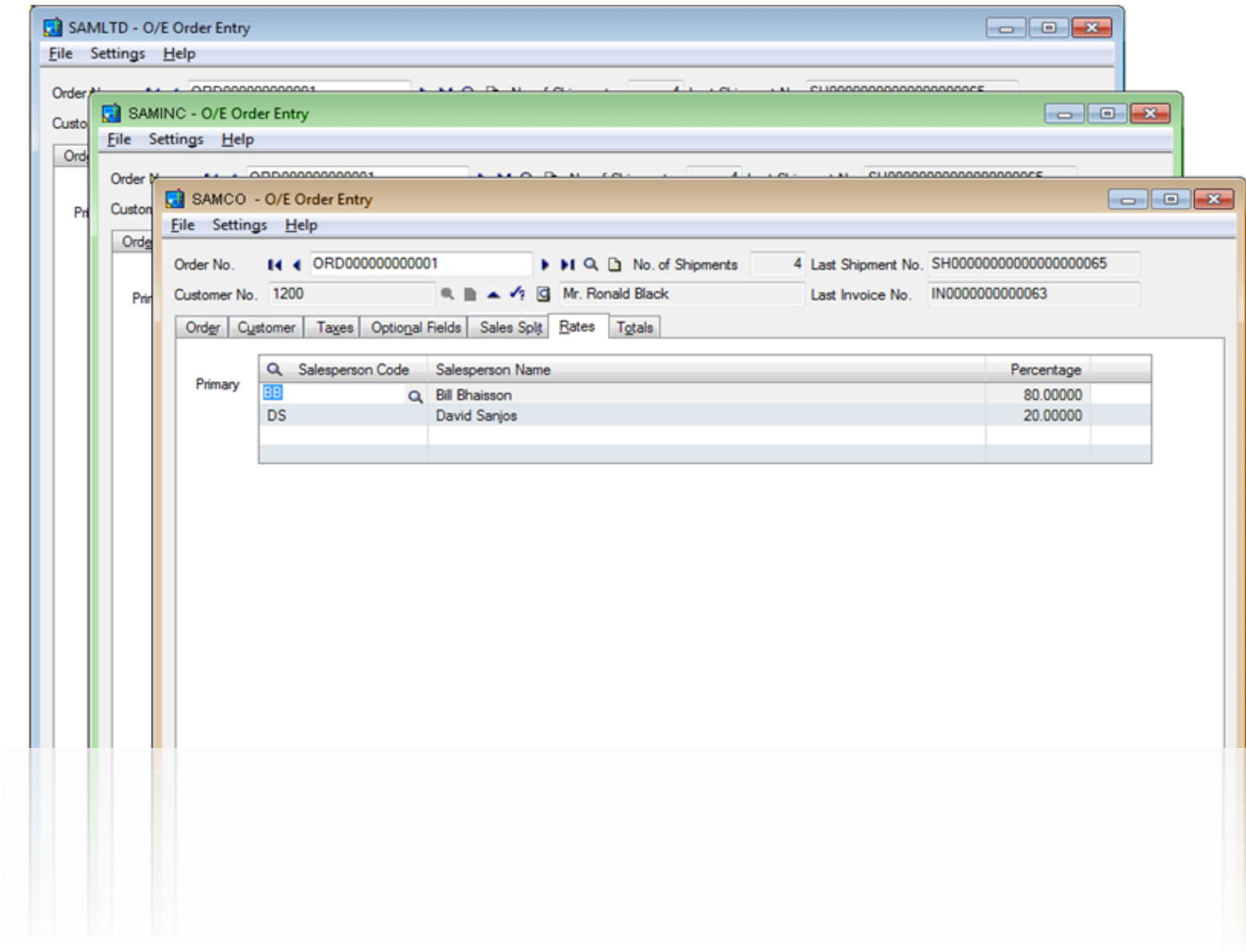
# Sage 300 – Classic Desktop - Shortcuts

- Use Tab and Shift-Tab to cycle between Sage 300 fields
- F1 = Help
- F4 = Displays Calendar
- F5 = Finder
- F7 = Activate GO button
- F9 = Activate ZOOM
- ALT = activates appropriate shortcut
- “+” or “-” = activates calculator (when pressed in any numeric field)

# Demonstration

## Keyboard shortcuts

# Color coded companies



	Salesperson Code	Salesperson Name	Percentage
Primary	BB	Bill Bhaissan	80.00000
	DS	David Sanjos	20.00000

70

Vote for

## Change desktop colour schemes

It would be useful for each user to be able to choose different colour schemes for different Accpac companies. Most common use would be where you are running a test ...

Comments (14) | by: Mary O. | 2 years ago | 5 - Setup / Environment

# New Post Button added to entry screens for GL, AP, AR, and Bank Services

**SQL61L - A/R Invoice Entry**

File Settings Help

Batch Number 66 Batch Date 08/23/2020 No. of Entries 1 Total Amount 897.390

Document Taxes Terms Optional Fields Sales Split Rates Totals

Entry Number Item Entered By ADMIN  
Customer Number 1200 Mr. Ronald Black Invoice Printed No  
Ship-To Location WAREHS Warehouse Account Set USA  
Document Type Invoice Document Date 08/23/2020 Posting Date 08/23/2020 2020-08 Currency USD  
Document Number IN00000000000000000012 Job Related  
PO Number Retainage  
Order Number Special Instructions Handle with care  
Shipment Number Ship Via

Lin...	Item No.	UOM	Description	Quantity	Unit Price	Extended Amt	Extended Cost	Dist. C...	Print Com...	Comment
1	CUSTOM-F...	UNIT	Custom furniture	1.00000	829.000000	829.00	629.00	ITEM	No	

Account/Tax...

Save Delete Prepay... Post Print Invoice... Close

# You can create a PO from the O/E Entry screen

PJCDAT - O/E Order Entry

File Settings Help

Order No. ORD0000000000095 No. of Shipments 1 Last Shipment No. SH000000000000000008

Customer No. 1200 Ronald Black Enterprises, Inc. Last Invoice No. IN000000000000072

Order Customer Taxes Optional Fields Sales Split Totals

Template Code ACTIVE PO No. Status: Posted Entered By:

Order Date 06/30/2010 ☐ On Hold

Order Type Active ☐ From Multiple Quotes ☐ Job Related ☐ Project Invoicing ☐ Retainage

Ship-To Location Location 1 Central warehouse - Seattle

Deliver By 06/30/2010 Exp. Ship Date 06/30/2010 ☒ Calc. Tax

Ship Via CCT Cross-Country Trucking Lines Tracking No.

Description Reference

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Deliver By	Exp. Ship Date
1	Item	S1-300/Y		Curved Screen ...	USA	1	6/30/2010	6/30/2010

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	-8	11	0	0	-8
All Locations (Ea.)	9,958	11	0	0	9,958

Item/Tax... Components... Ship All Order Subtotal 1,910.81

Post Create PO Delete History... Prepayment... Pre-authorize... Close

# We now have Credit Card Processing in A/R

## A/R Receipt Entry:

- Sage Payment Solutions integration is also available within the A/R Receipt Entry screen.

The screenshot shows the 'SAMINC - A/R Receipt Entry' window. It features a menu bar (File, Settings, Help) and a toolbar with navigation icons. The main area contains several input fields organized into sections:

- Batch Information:** Batch Number (with navigation icons), Batch Date (06/30/2020), No. of Entries (0), Total Amount (0.000), Bank, Deposit Number (0), and Deposit Date (//).
- Entry Information:** Entry Number (0), Transaction Type (Receipt), Receipt Date (//), Posting Date (//), Entered By (ADMIN), and a dropdown for 0000 - 00.
- Customer and Reference:** Customer Number, Reference, Payment Code, and Document Number.
- Financials:** Receipt Amount (0.000), Receipt Unapplied (0.00), Apply Method (Prorate by Amount), Check/Receipt No., and Advance Credit (0.000).
- Optional Fields:** A checkbox labeled 'Optional Fields'.
- Table:** A table with columns: Document Number, Payment Number, Current Balance, Net Balance, Discount Available, Applied Amount, Discount Taken, Adjustment Amount, and Job Rel. The table is currently empty.
- Bottom Toolbar:** Buttons for Add, Delete, Post, Charge... (highlighted with a red box), Adjust..., Jobs..., History..., Deposit..., Print Receipt..., and Close.



# Sage 300 now have Credit Card Processing O/E

## Order Entry screens:

- Order Entry
- Prepayment
- Shipment
- Invoice
- Batch Processing

PJCDAT - O/E Order Entry

File Settings Help

Order No. ORD0000000000095 No. of Shipments 1 Last Shipment No. SH000000000000000008

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	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	-8	11	0	0	-8
All Locations (Ea.)	9,958	11	0	0	9,958

Item/Tax... Components... Ship All Order Subtotal 1,910.81

Post Create PO Delete History... Prepayment... Pre-authorize... Close

# Have you ever wish that the batches from your sub ledgers just posted straight through to the GL?

## Scenario –

- From OE to AR to GL
- G/L Integration --> next slide

# Start in lowest Level module (O/E)

Sage 300 - Sample Company Inc. - PJC - FY2010

File Object View Macro Help

Open Company Page Setup Cut Copy Paste Delete Properties Up One Level View Record Macro Stop Recording Run Macro Edit Macro Notes Website About Live Chat Context Help

Sample Company Inc. - PJC - FY2010

- Accounts Payable
- Accounts Receivable
  - A/R Customer Reports
  - A/R Customers
  - A/R Periodic Processing
  - A/R Setup
  - A/R Setup Reports
  - A/R Transaction Reports
  - A/R Transactions
  - Customer Number Change
- Administrative Services
- Canadian Payroll
- Common Services
- General Ledger
  - Account Code Change
  - Financial Reporter
  - G/L Accounts
  - G/L Periodic Processing
  - G/L Reports
  - G/L Setup
  - G/L Transactions
- Intelligence Reporting
- Inventory Control
- Ops Inquiry
- Order Entry
  - O/E Forms
  - O/E Periodic Processing
  - O/E Reports
  - O/E Setup

Order Entry (G/L Integration)

Licensed to: Sage, Sage  
Dealer: Sage  
CC: Sage

Options Templates Miscellaneous... Ship-Via Codes E-mail Messages Optional Fields G/L Integration

PJCDAT - O/E G/L Integration

File Help

Integration Transactions

G/L Transactions Generated Through Day End Number 339

G/L Source Codes

Transaction Type	Source Ledger	Source Type
Shipments	OE	SH
Invoices	OE	IN
Credit Notes	OE	CN

Create G/L Transactions During Posting

Create G/L Transactions By Creating and Posting a New Batch

Consolidate G/L Batches Do Not Consolidate

Save Close

#Sage

# Then next Level up (A/R)

The screenshot shows the Sage 300 Accounts Receivable (G/L Integration) window. The left sidebar contains a tree view of the application structure. The main window displays the 'Accounts Receivable (G/L Integration)' section, which is licensed to Sage. Below the title bar, there is a toolbar with various icons. A sub-window titled 'PJC DAT - A/R G/L Integration' is open, showing the 'Integration' tab. This sub-window contains two tables: 'G/L Transactions Generated Through' and 'G/L Source Codes'. The 'G/L Transactions Generated Through' table lists posting sequences and their corresponding posting sequence numbers. The 'G/L Source Codes' table lists transaction types, source ledgers, and source types. At the bottom of the sub-window, there are three dropdown menus for configuration: 'Create G/L Transactions' (set to 'During Posting'), 'Create G/L Transactions By' (set to 'Creating and Posting a New Batch'), and 'Consolidate G/L Batches' (set to 'Do Not Consolidate').

Sample Company Inc. - PJC - FY2010

File Object View Macro Help

Open Company Page Setup Cut Copy Paste Delete Properties Up One Level View Record Macro Stop Recording Run Macro Edit Macro Notes Website About Live Chat Context Help

Sample Company Inc. - PJC - FY2010

- Accounts Payable
- Accounts Receivable**
  - A/R Customer Reports
  - A/R Customers
  - A/R Periodic Processing
  - A/R Setup**
    - A/R Setup Reports
    - A/R Transaction Reports
    - A/R Transactions
    - Customer Number Change
  - Administrative Services
  - Canadian Payroll
  - Common Services
  - General Ledger
  - Intelligence Reporting
  - Inventory Control
  - Ops Inquiry
  - Order Entry
  - Project and Job Costing
  - Purchase Orders
  - Sage CRM
  - US Payroll
  - Visual Process Flows

**Accounts Receivable (G/L Integration)**

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Dealer: Sage  
CC: Sage

Options Account Sets Billing Cycles Distribution Codes Dunning Messages Interest Profiles Payment Codes Salespersons Terms Items Comment Types E-mail Messages Optional Fields **G/L Integration**

**PJC DAT - A/R G/L Integration**

File Help

Integration Transactions

G/L Transactions Generated Through

Posting Sequence	Posting Sequence No.
Invoice Posting Sequence	306
Receipt Posting Sequence	80
Adjustment Posting Sequence	59
Refund Posting Sequence	3

G/L Source Codes

Transaction Type	Source Ledger	Source Type
Invoice	AR	IN
Debit Note	AR	DB
Credit Note	AR	CR
Interest Charge	AR	IT
Payment Received	AR	PY
Prepayment	AR	PI
Unapplied Cash	AR	UC
Adjustment	AR	AD
Refund	AR	RF
Write-Off	AR	WO
Payment Received Reversal	AR	PY
Refund Reversal	AR	RF
Discount	AR	ED
Consolidation	AR	CO

Create G/L Transactions: During Posting

Create G/L Transactions By: Creating and Posting a New Batch

Consolidate G/L Batches: Do Not Consolidate

Save Close

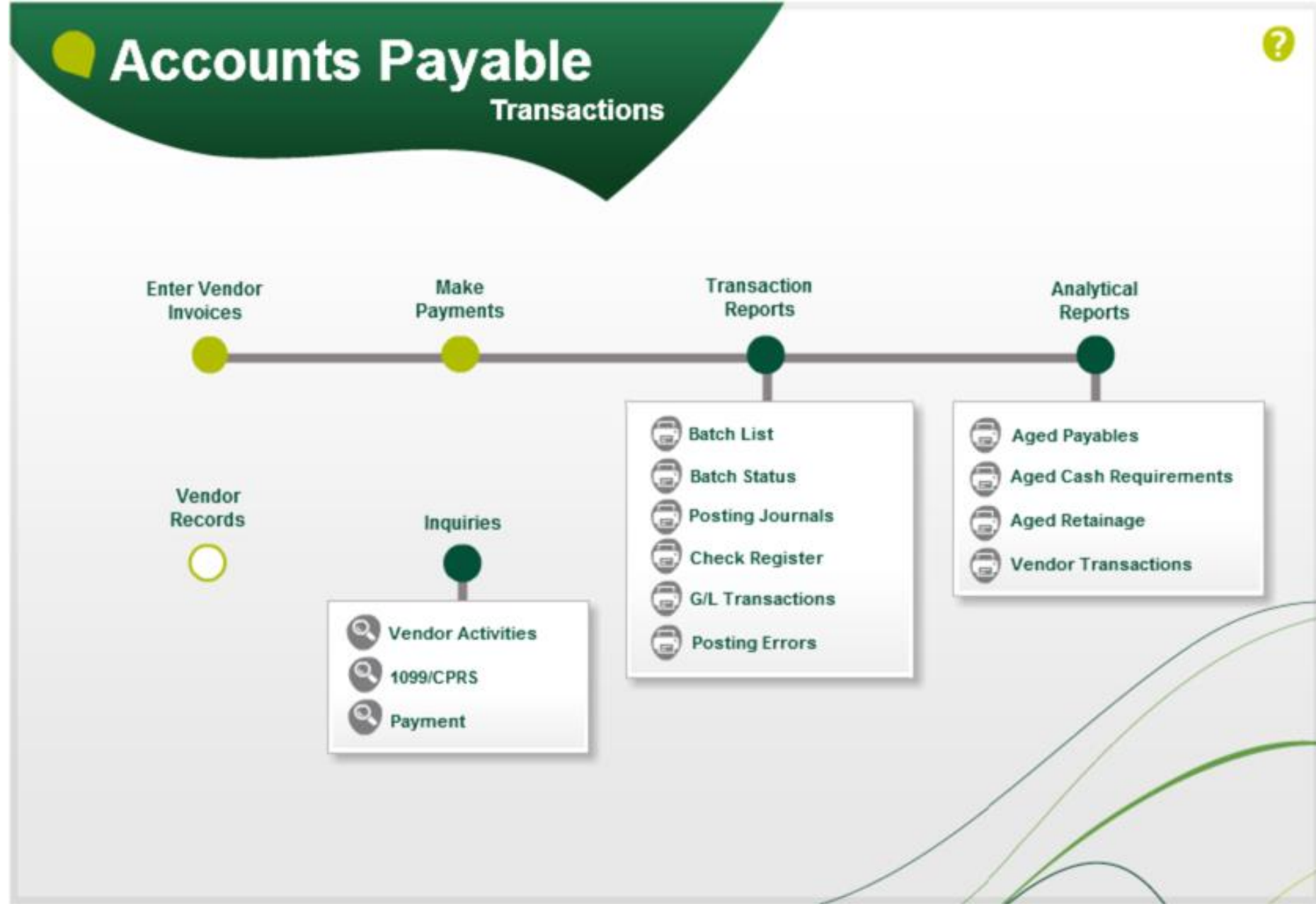
# Result of these GL Integration settings?

- Now when I enter and post an OE Invoice it will flow down automatically to the AR module where a batch will be created and posted.
- Which will then lead to a batch being created and posted in the GL, per transaction in OE.

# Do you wish you could document your specific processes inside Sage 300 for new staff and existing staff?

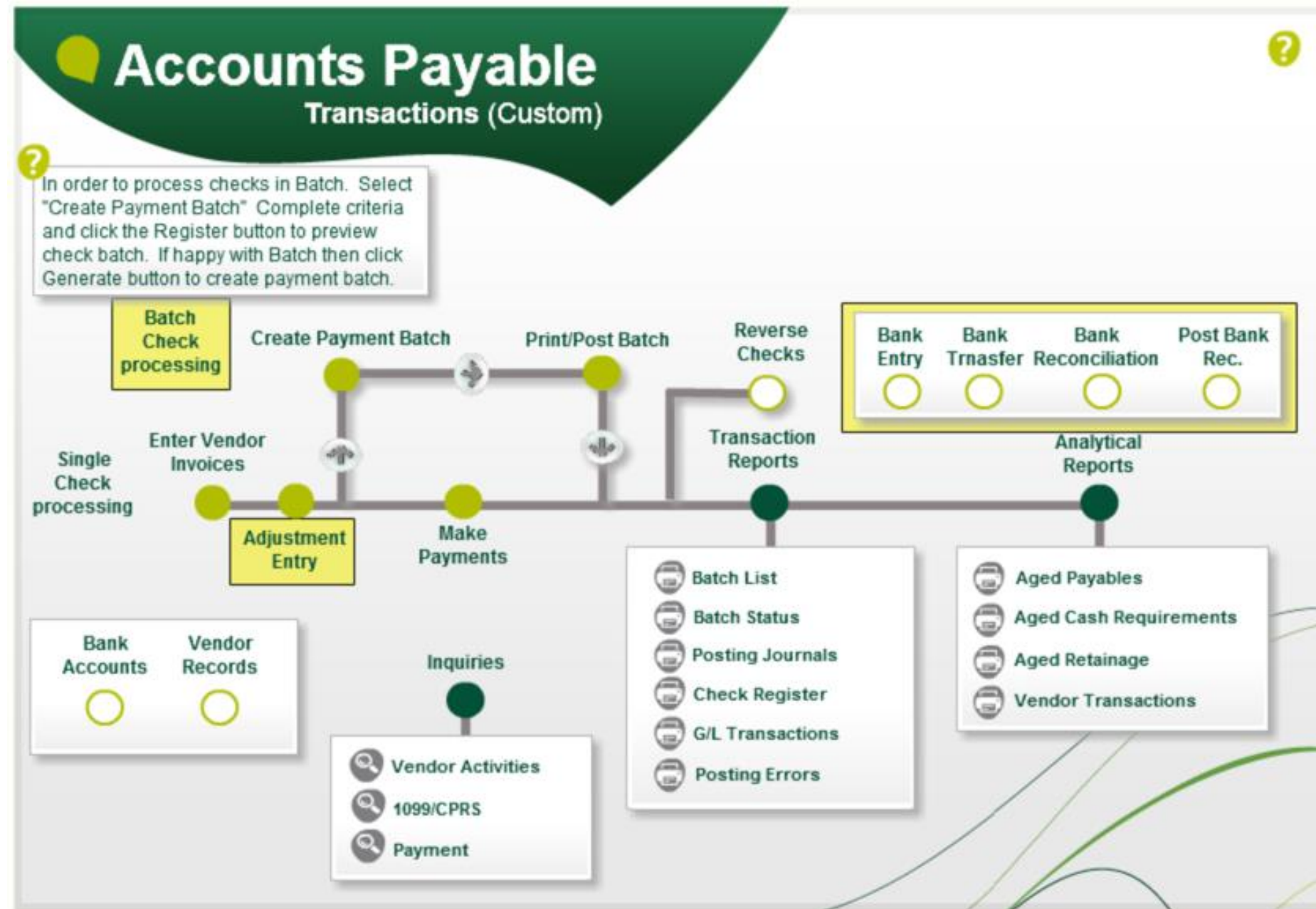
- Visual Process Flows

# Before



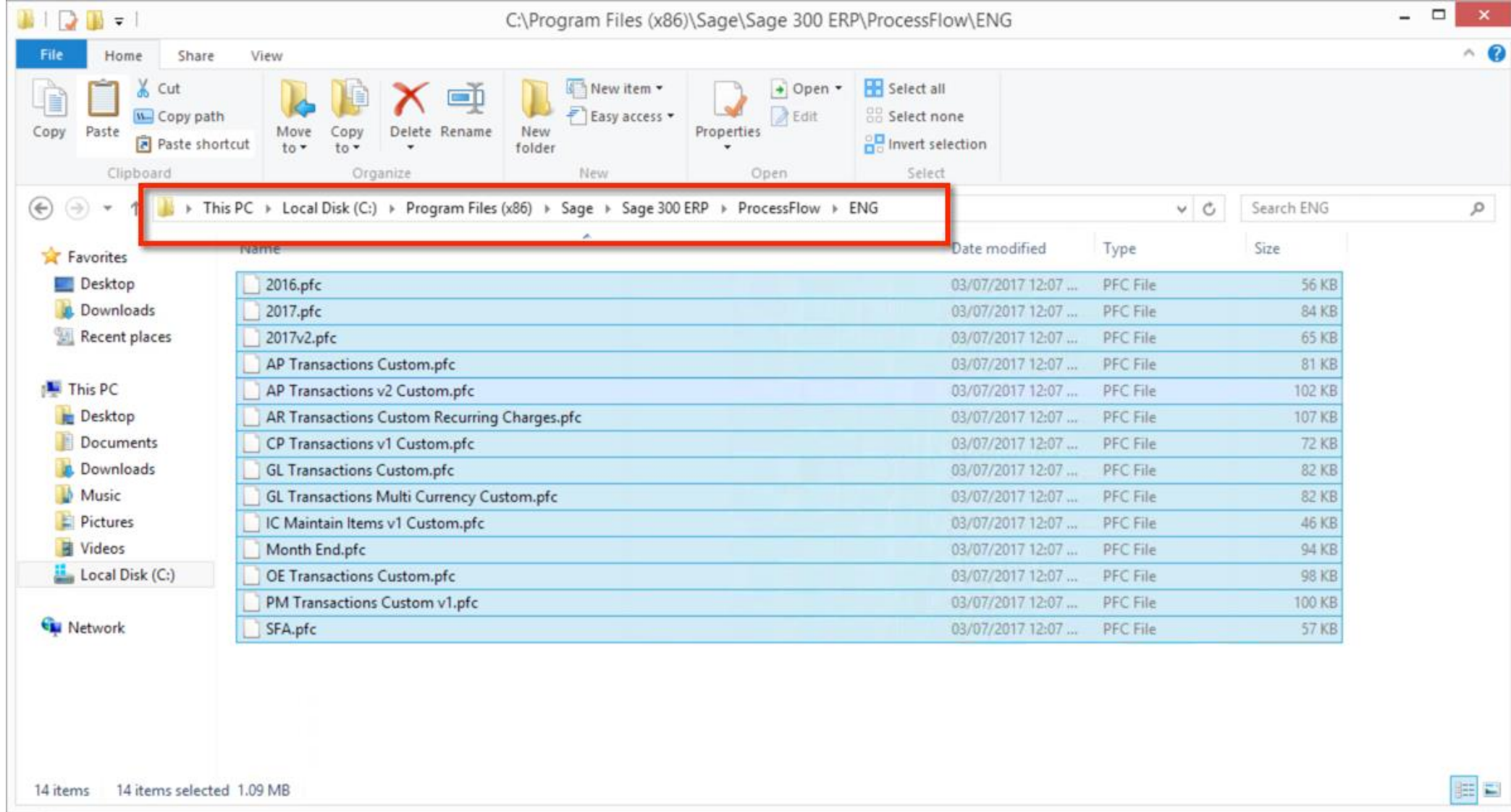


# After





# File location



C:\Program Files (x86)\Sage\Sage 300 ERP\ProcessFlow\ENG

# Assign Visual Process Flows

Sage 300 - Sample Company Inc. - PJC - FY2010

File Object View Macro Help

Open Company Page Setup Cut Copy Paste Delete Properties Up One Level View Record Macro Stop Recording Run Macro Edit Macro Notes Website About Live Chat Context Help

Sample Company Inc. - PJC - FY2010

- Accounts Payable
- Accounts Receivable
- Administrative Services**
- Canadian Payroll
- Common Services
- General Ledger
- Intelligence Reporting
- Inventory Control
- Ops Inquiry
- Order Entry
- Project and Job Costing
- Purchase Orders
- Sage CRM
- US Payroll
- Visual Process Flows

**Administrative Services (Assign Visual Process Flows)**

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Dealer: Sage  
CC: Sage

Users Security Groups User Authoriz... Customizat... Directories Data Activation UI Profile Maintenance Assign UI Profiles **Assign Visual Process Flo...** Data Integrity Restart Maintenance Database Dump Database Load Administrat... Reports

**PJCDAT - Assign Visual Process Flows**

File Help

User ID: ADMIN

User Name: Administrator

☒ **Process Flow Templates**

- ☒ A/P Transactions
- ☒ A/R Transactions
- ☒ B/K Reconciliation
- ☒ C/P Transactions
- ☒ G/L Transactions
- ☒ I/C Maintain Items
- ☒ I/C Transactions
- ☒ O/E Transactions
- ☒ P/M Transactions
- ☒ P/O Transactions
- ☒ O/P Transactions

☒ **Custom Process Flows**

- ☒ A/P Transactions (Custom)
- ☒ A/P Transactions v2 (Custom)
- ☒ A/R Setup - Setup of Recurring Charges & CC Processing - (Custom)
- ☒ C/P Transactions (Custom)
- ☒ G/L Transactions (Custom)
- ☒ G/L Transactions (Multi-currency) (Custom)
- ☒ I/C Maintain Items v1 (Custom)
- ☒ Month-end & Year-end Processes (Custom)
- ☒ New in 2016 (Custom)
- ☒ New in 2017 (Custom) (WIP)
- ☒ New in 2017v2 (Custom) (WIP)
- ☒ O/E Transactions (Custom)
- ☒ P/M Transactions (Custom) WIP
- ☒ Sage Fixed Assets (Custom)

Save Close

# Demonstration

## Visual Process Flows

Have you ever wanted to clean up and/or streamline your data entry screens within Sage 300?

Have you ever wanted to simply hide those fields your company never uses within Sage 300?

- If yes? Then Sage 300 UI Profiles is your answer!

# Hiding Fields

## Sage 300 – Classic Desktop

- Requires use of the “admin” account
- Within a screen select File | Customize
- Use UI Profile Maintenance and Assign UI Profiles objects to a specific profile.
- Then assign users to a specific profile.

## Sage 300 c - Web Screens

- This can also be done with 300 c Web Screens
- An additional feature only in Sage 300 c Web Screens is that the labels on fields can be renamed. Ex: “Customer Number” to “Client ID:”.

# Demonstration

Hiding fields

Sage 300 classic desktop

# Do you ever need the Sage 300 screens to be presented in a different language?

- If yes? Then Sage 300 ships with multiple languages:
  - English US
  - English UK
  - French
  - Spanish
  - Simplified Chinese
  - Traditional Chinese

## NOTES:

- The text ENTERED into Sage 300 is ALWAYS presented as entered.
- So, If my language is English US and I enter data in English US and your language is French, then when I see your data it will be in French.
- While the screen will be presented to me in English US.

# Sage 300 Language Packs

## **Sage 300 – Classic desktop**

- Individual user setup controls that users language.

## **Sage 300 c – web screen**

- The translation is based upon default language of browser
- The Firefox browser can use used to show/see this feature.
  - By simply changing the language used on the Firefox browser from English to French to see the language change within Sage 300 c. You will need to log out and back into Sage 300 c to see the change applied.



- Have you ever had a new employee start at your organization?
- Have you ever wished you could copy over all of another employees user preferences to this new employee setup?

Examples include:

AP Check spec, Column preferences, Finder preferences.

- Copy UI customizations across multiple users:
- UI customizations for each user is stored in the:  
  \<Sage \_300\_install\_folder>\users\<USERID>\<companyID\_P>.ism
- This file can be copied to other users folder
- **NOTE:** This would also apply to copying over an existing user settings to an existing company or a newly added company, with the appropriate file names.

# Demonstration

Sage 300 Screen customization (O/E Entry)  
UI Profiles setup/configuration inside Administration Services

# Have you ever wished you could have a shortcut to another program within Sage 300?

- Right Click New Folder (Rob's Folder)
- Right Click New Shortcut
- OR Copy and paste various shortcuts

# Have you ever wished that a screen or set of screens would load/open automatically every time you log into an existing company?

- Startup Folder within Main Menu
- Right Click New Folder (Start-up)
- Right Click and add shortcut or copy shortcut.

# Demonstration

Folder creation  
Startup & Rob's Stuff

# Have you ever wondered how to run separate departmental income statements within Sage 300?

- Start the Financial Report Writer or Designer
- Select a Financial Statement to run
- Select the G/L account Segment to generate your Financial Statements on
- Then click Separate

Report As:  
Separate

Sort by:  
Segment | Division

File Object View Macro Help

Open Company

Page Setup

Cut

Copy

Paste

Delete

Properties

Up One Level

View

Record Macro

Stop Recording

Run Macro

Edit Macro

Notes

Website

About

Live Chat

Context Help

Sample Company Inc.

Accounts Payable

Accounts Receivable

Administrative Services

Common Services

General Ledger

Account Code Change

Financial Reporter

G/L Accounts

G/L Periodic Processing

G/L Reports

G/L Setup

G/L Transactions

Intelligence Reporting

Inventory Control

Ops Inquiry

Order Entry

Project and Job Costing

Purchase Orders

Robs Stuff

Sales Analysis

Startup

US Payroll

Visual Process Flows

General Ledger (Print Financial Statements)

Licensed to: Sage, Sage  
Dealer: Sage  
CC: Sage

Print Financial ...

Statement Designer

SAMINC - G/L Print Financial Statements

File Settings Help

Statement Name

Browse...

Fiscal Option

Year/Period2020 - 06

Report Type

Report As

Include

Actual

Provisional

Consolidated

Separate

Report Options

Drill Down Information

Sort By

Account No.

Segment

Account Group

From

To

Division

Select Account Groups By Sort Code Range

From Account Group

To Account Group

ZZZ

ZZZZZZZZZZZZ

Segment Name	From	To	Report As
Account		ZZZZ	Consolidated
Region		ZZ	Consolidated

Print Destination

Printer

Preview

File

E-mail

Print

Close

#SageSessions

# Have you ever wondered how to Drill down from your Financial Statements to the source transactions within Sage 300 Financial Reporter?

- Start the Financial Statement Designer
- Select a Financial Statement to run (hint: quickinc1)
- Select the G/L account Segment to generate your Financial Statements on
- Then navigate to the preview area
- Then right click on one of the account Balances and select FR Drilldown.

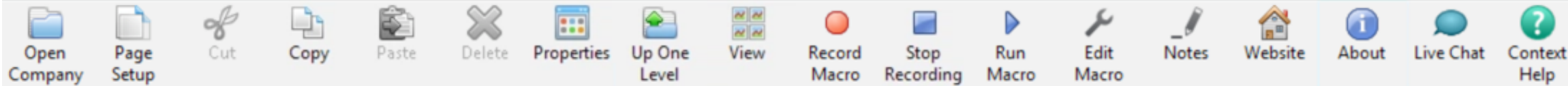


# Sage 300 Application Object Models

- When you are writing reports for Sage 300 have you ever wondered how all those tables are connected together?
- Start Sage 300 classic desktop
  - Find the screen where the data is entered.
  - Right click on icon select properties.
  - Note the Program ID for that screen.
- Start | All Programs | Sage 300 | Tools | U.I. Info
  - Navigate to the Module of the icon selected.
  - Find the Program ID, select Get Info!

# Program For Order Entry screen

File Object View Macro Help



- Sample Company Inc.
  - Accounts Payable
  - Accounts Receivable
  - Administrative Services
  - Common Services
  - General Ledger
  - Intelligence Reporting
  - Inventory Control
  - Ops Inquiry
  - Order Entry
    - O/E Forms
    - O/E Periodic Processing
    - O/E Reports
    - O/E Setup
    - O/E Statistics and Inquiries
    - O/E Transactions
  - Project and Job Costing
  - Purchase Orders
  - Robs Stuff
  - Sales Analysis
  - Startup
  - US Payroll
  - Visual Process Flows

## Order Entry (Order Entry)

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Dealer: Sage  
CC: Sage

Order Entry

Shipment  
Entry

Invoice Entry

Credit/Debit  
Note Entry

Copy Orders

Capture  
Payments ...

### Order Entry Properties

General



Change Icon...

Source Stock Object

Type Program (ID: OE1100)

Title Order Entry

☐ Start Multiple Copies☐ Start Finder First☐ All Users

OK

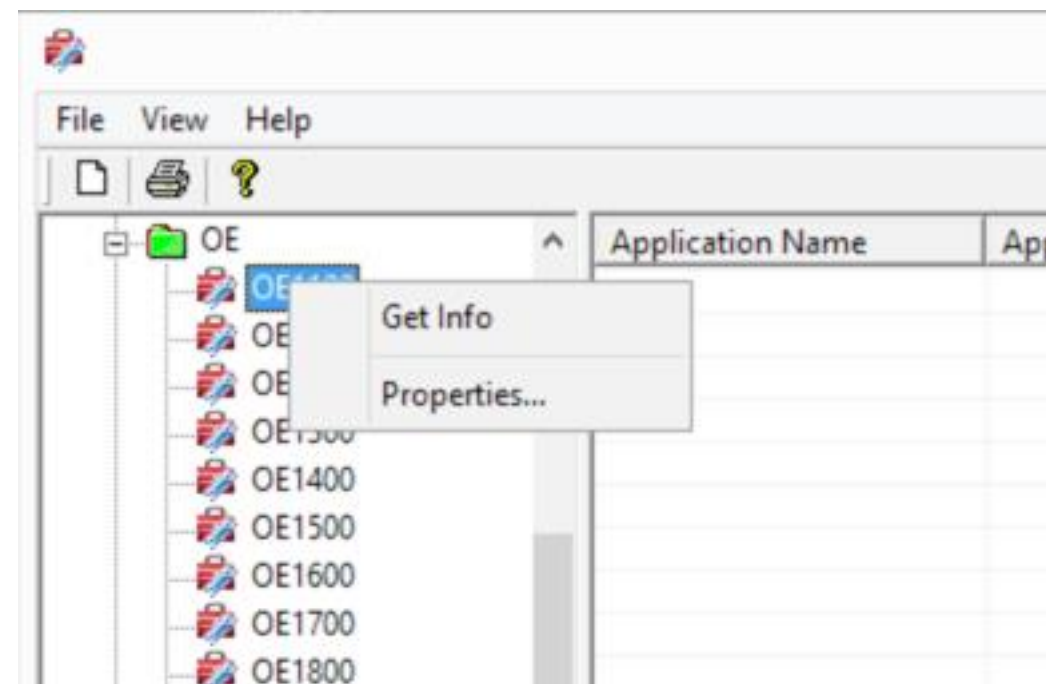
Cancel

Apply

Help

Find Program ID OE1100 under OE

Right click and select “Get Info”



Select the information you are looking for.

I have selected Order Details which is View ID: OE0500

Sage 300 - Sage 500 Info

File View Help

IC  
OE  
PM  
PO  
TX  
UP  
UT  
YP

Application Name	Application ID	Type	Index	Module Name	View ID	Description	TabIndex	Left	Top
O/E Order/Invoice Entry	OE1100								
		DS	1	adsARNAT	AR0028	National Accounts			
		DS	2	dsYPMID	YP0500	Processing Codes			
		DS	3	dsYPPMTINF	YP0406	Payment Info			
		DS	4	dsARPTP	AR0012	Payment Codes			
		DS	5	dsOEPAUTH	OE0535	Order Pre-Authorization			
		DS	6	dsOEORDDDL	OE0506	Order Kitting Detail Lot Numbers			
		DS	7	dsOEORDDL	OE0507	Order Detail Lot Numbers			
		DS	8	dsOEORDDS	OE0508	Order Detail Serial Numbers			
		DS	9	dsICITEM_X	IC0310	Items			
		DS	10	adsARRAS	AR0013	Account Sets			
		DS	11	adsICITMC	IC0319	Customer Item Numbers			
		DS	12	dsOESHIH	OE0692	Shipments			
		DS	13	dsOEORSH	OE0533	Order to Shipment Drilldown			
		DS	14	dsOEORDDB	OE0503	Order BOM Details			
		DS	15	dsICLOCQT	IC0374	Location Quantity			
		DS	16	dsOEORDDDS	OE0504	Order Kitting Serial Numbers			
		DS	17	dsOEORDD	OE0502	Order Kitting Details			
		DS	18	adsOEORDD	OE0500	Order Details			
		DS	19	dsOEORDDO	OE0501	Order Detail Optional Fields			
		DS	20	dsOEOFD	OE0470	Optional Fields			
		DS	21	dsOEOFH	OE0475	Optional Field Locations			
		DS	22	dsOEORDHO	OE0522	Order Optional Fields			
		DS	23	adsICIOTH	IC0305	Manufacturer's Item Number			
		DS	24	adsOEORDQ	OE0526	Order from Quotes			
		DS	25	adsOESHHD	OE0690	Sales History			
		DS	26	adsOEORDH2	OE0520	Orders			
		DS	27	adsARBTA2	AR0041	Receipt and Adjustment Batches			
		DS	28	adsARBTA	AR0041	Receipt and Adjustment Batches			
		DS	29	adsICLOCQT	IC0374	Location Quantity			
		DS	30	adsOEPRIC	OE0630	Item Pricing			
		DS	31	adsICITEM	IC0310	Items			
		DS	32	adsARRTA	AR0016	Terms Codes			
		DS	33	adsARCUS	AR0024	Customers			
		DS	34	adsOEORPP	OE0530	Order Prepayments			
		DS	35	adsOECOINO	OE0180	Order Comments/Instructions			
		DS	36	adsOETERMO	OE0740	Order Payment Schedules			
		DS	37	adsOEORDH	OE0520	Orders			
		DS	38	adsOEOPT	OE0480	O/E Options			
		CTL	1	APP_OneClickPreAuth_Button		&Quick Pre-authorize	120	8100	9420
		CTL	2	APP_CreatePO_Button		Create PO	115	1530	9420
		CTL	3	APP_Authorization_Button		Pre-au&thorize...	119	6660	9420
		CTL	4	APP_Contracts_Button		Contracts...	121	9960	9420
		CTL	5	fecOEORDH_LastInvNumber		Last Invoice No.	187	9660	615
		CTL	6	fecOEORDH_NoOfShipments		No. of Shipments	176	7210	180
		CTL	7	fecOEORDH_LastShipNumber		Last Shipment No.	175	9660	180
		CTL	8	APP_History_Button		Histor&y...	117	4080	9420
		CTL	9	APP_Prepayment_Button		Prepay&ment...	118	5355	9420
		CTL	10	afeOEORDHBilName		Bill-To Name	123	6270	615
		CTL	11	afeOEORDHcustomer		Customer No.	1	870	615
		CTL	12	afeOEORDHordnumber		Order No.	0	870	180
		CTL	13	APP_Delete_Button		&Delete	116	2790	9420
		CTL	14	APP_Save_Button		Po&st	114	270	9420
		CTL	15	APP_Close_Button		&Close	122	13320	9420
		CTL	16	stbOrderEntry		Ord&er	5	270	1020
		CTL	17	afeOEORDHreqdate1		Deliver By	19	250	2235
		CTL	18	APP_OpsInq_ItemInq_Button		Item Drill (&1)	40	5775	7725
		CTL	19	fecOEORDH_PCodDesc			212	-70905	1800

Ready

# Sage 300 Application Object Model

KB Article.

NOTE:  
MUST!!!  
Be logged into  
Customer or  
Partner Portal.

Is there a database schema (Application Object Model) available for Sage 300 ERP

### Products

Sage 300  
Sage 300 2017  
Sage 300 2016  
Sage 300 2014  
Sage 300 2012 (retired)  
Sage 300 6.0 (retired)  
Sage 300 5.6 (retired)

### Description

The database schema for Sage 300 ERP is one of the components of the Application Object Model (or AOM).

### Resolution

You can download compressed local copies of the AOM for your version below.

- Unzip (decompress) the zip file into a folder
- Find and open the file Advantage.html
- In versions 2012 / 2014, the file is called Advantage.xml.  
This file will not display in Google Chrome, unless it is accessed from a web server.

For more Help: [Chat with Support](#)

### Category

Backup, restore  
Corruption  
Data and database  
Import, export

### Entitlement

Open

Source:  
<https://support.na.sage.com/selfservice/viewContent.do?externalId=19194&sliceId=1>



Sage 300 2017  
Application  
Object  
Model

Landing Page:

Select OE

**Sage 300 ERP 2017**  
**Application Object Models**

Prefix	Application Name	Version
<a href="#">AP</a>	Accounts Payable	2017
<a href="#">AR</a>	Accounts Receivable	2017
<a href="#">AS</a>	Administrative Services	2017
<a href="#">BK</a>	Bank Services	2017
<a href="#">CP</a>	Canadian Payroll	7.3A
<a href="#">CT</a>	Cdn PR Tax Update July 1, 2016	7.3A
<a href="#">CS</a>	Common Services	2017
<a href="#">EW</a>	Sage CRM Integration	2017
<a href="#">FA</a>	Sage FAS Integration	2017
<a href="#">GL</a>	General Ledger	2017
<a href="#">GP</a>	G/L Subledger Services	2017
<a href="#">IC</a>	Inventory Control	2017
<a href="#">KN</a>	Notes	2017
<a href="#">OE</a>	Order Entry	2017
<a href="#">PM</a>	Project and Job Costing	2017
<a href="#">PO</a>	Purchase Orders	2017
<a href="#">TX</a>	Tax Services	2017
<a href="#">UP</a>	US Payroll	7.3A
<a href="#">UT</a>	US PR Tax Update June 30, 2016	7.3A
<a href="#">YP</a>	Payment Processing	2017
<a href="#">ZC</a>	G/L Consolidations	2017
<a href="#">ZI</a>	Intercompany Transactions	2017

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Note RotoID = View ID

Scroll down and select  
view previously  
discussed

OE0500

## Application: Order Entry 6.4A

[Views](#)  
[Tables](#)  
[Objects](#)

Views: 137

RotoID	Tables	Title	DLL
<a href="#">OE0100</a>	<a href="#">OEAUDD</a>	Posting Journals - Details	OEAUDD <a href="#">OE0120</a> , <a href="#">OE0110</a> , <a href="#">OE0105</a>
<a href="#">OE0105</a>	<a href="#">OEAUDDD</a>	Posting Journals - Detail-Details	OEAUDDD <a href="#">OE0100</a>
<a href="#">OE0110</a>	<a href="#">OEAUDDP</a>	Posting Jnls Detail Opt. Fields	OEAUDDP <a href="#">OE0100</a>
<a href="#">OE0120</a>	<a href="#">OEAUDH</a>	Posting Journals	OEAUDH <a href="#">OE0100</a> , <a href="#">OE0123</a>
<a href="#">OE0123</a>	<a href="#">OEAUDHP</a>	Posting Journals Optional Fields	OEAUDHP <a href="#">OE0120</a>
<a href="#">OE0126</a>		Capture Payments with Invoices	OEPPMT <a href="#">OE0127</a>
<a href="#">OE0127</a>	<a href="#">OEPPMTD</a>	Preauthorized Payment Details	OEPPMTD
<a href="#">OE0130</a>		Clear History	OECH
<a href="#">OE0140</a>	<a href="#">OECOINC</a>	Crd/Dbn Comments/Instructions	OECOINC <a href="#">OE0240</a>
<a href="#">OE0160</a>	<a href="#">OECOINI</a>	Invoice Comments/Instructions	OECOINI <a href="#">OE0420</a>
<a href="#">OE0180</a>	<a href="#">OECOINO</a>	Order Comments/Instructions	OECOINO <a href="#">OE0520</a> , <a href="#">OE0500</a>
<a href="#">OE0190</a>	<a href="#">OECOINS</a>	Shipment Comments/Instructions	OECOINS <a href="#">OE0692</a> , <a href="#">OE0691</a>
<a href="#">OE0194</a>		Currency Order Inquiry	OEIOY
<a href="#">OE0200</a>	<a href="#">OECOMM</a>	Commissions	OECOMM
<a href="#">OE0210</a>			OECONV
<a href="#">OE0220</a>	<a href="#">OECRDD</a>	Credit/Debit Details	OECRDD <a href="#">OE0240</a> , <a href="#">OE0221</a> , <a href="#">OE0223</a> , <a href="#">OE0222</a> , <a href="#">OE0227</a> , <a href="#">OE0226</a>
<a href="#">OE0221</a>	<a href="#">OECRDDO</a>	Credit/Debit Detail Opt. Fields	OECRDDO <a href="#">OE0220</a>
<a href="#">OE0222</a>	<a href="#">OECRDDD</a>	Credit/Debit Kitting Details	OECRDDD <a href="#">OE0220</a> , <a href="#">OE0224</a> , <a href="#">OE0225</a>
<a href="#">OE0223</a>	<a href="#">OECRDDB</a>	Credit/Debit BOM Details	OECRDDB <a href="#">OE0220</a>
<a href="#">OE0224</a>	<a href="#">OECRDDDS</a>	Credit/Debit Kitting Serial Nos	OECRDDDS <a href="#">OE0222</a>
<a href="#">OE0225</a>	<a href="#">OECRDDDL</a>	Credit/Debit Kitting Detail Lot Numbers	OECRDDDL <a href="#">OE0222</a>
<a href="#">OE0226</a>	<a href="#">OECRDDL</a>	Credit/Debit Detail Lot Numbers	OECRDDL <a href="#">OE0220</a>
<a href="#">OE0227</a>	<a href="#">OECRDDS</a>	Credit/Debit Detail Serial Nos	OECRDDS <a href="#">OE0220</a>
<a href="#">OE0240</a>	<a href="#">OECRDH</a>	Credit/Debit Notes	OECRDH <a href="#">OE0220</a> , <a href="#">OE0999</a> , <a href="#">OE0140</a> , <a href="#">OE0242</a>
<a href="#">OE0242</a>	<a href="#">OECRDHO</a>	Credit/Debit Note Opt. Fields	OECRDHO <a href="#">OE0240</a>
<a href="#">OE0250</a>		Credit Note Processing	OECRDP <a href="#">OE0240</a> , <a href="#">OE0220</a>
<a href="#">OE0255</a>		O/E Sage CRM Processing	OECRMP
<a href="#">OE0260</a>		O/E Posting	OEDEND
<a href="#">OE0265</a>		OE Drill Down	OEDLDN
<a href="#">OE0270</a>		Flag Printed Records	OEFLAG
<a href="#">OE0271</a>		Create Batch	OEGLTR
<a href="#">OE0272</a>	<a href="#">OEGLREF</a>	G/L Reference Integration	OEGLREF
<a href="#">OE0273</a>		Shipment Comments/Instructions	OEICOIS <a href="#">OE0434</a> , <a href="#">OE0190</a>
<a href="#">OE0275</a>		Order Entry Activation	OEINIT
<a href="#">OE0278</a>	<a href="#">OEINPP</a>	Invoice Prepayments	OEINPP
<a href="#">OE0280</a>		Integrity Checker	OEINTCK
<a href="#">OE0310</a>	<a href="#">OEINTL</a>	Invoice Lot For DEP	OEINTL
<a href="#">OE0313</a>	<a href="#">OEINTS</a>	Invoice Serial For DEP	OEINTS

<a href="#">OE0440</a> <a href="#">OEMISC</a>	Miscellaneous Charges	OEMISC	<a href="#">OE0460</a> , <a href="#">OE0450</a>
<a href="#">OE0450</a> <a href="#">OEMISCO</a>	Misc. Charge Optional Fields	OEMISCO	<a href="#">OE0440</a>
<a href="#">OE0460</a> <a href="#">OEMISCT</a>	Miscellaneous Charge Taxes	OEMISCT	<a href="#">OE0440</a>
<a href="#">OE0465</a> <a href="#">OEMSG</a>	E-mail Messages	OEMSG	
<a href="#">OE0468</a>	OE Optional Field Callbacks	OEOFCMD	

RotolD	Tables	Title	DLL
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<del><a href="#">OE0468</a></del>	<del>Creates Order from Existing Orders</del>	<del>OEORDD</del>	<del><a href="#">OE0520</a>, <a href="#">OE0500</a>, <a href="#">OE0503</a>, <a href="#">OE0502</a>, <a href="#">OE0508</a>, <a href="#">OE0740</a>, <a href="#">OE0400</a>, <a href="#">OE0526</a>, <a href="#">OE0522</a>, <a href="#">OE0501</a>, <a href="#">OE0503</a>, <a href="#">OE0502</a>, <a href="#">OE0506</a>, <a href="#">OE0504</a>, <a href="#">OE0520</a>, <a href="#">OE0500</a>, <a href="#">OE0507</a>, <a href="#">OE0508</a>, <a href="#">OE0740</a>, <a href="#">OE0180</a>, <a href="#">OE0526</a>, <a href="#">OE0522</a>, <a href="#">OE0501</a>, <a href="#">OE0503</a>, <a href="#">OE0502</a>, <a href="#">OE0506</a>, <a href="#">OE0504</a></del>
<a href="#">OE0500</a> <a href="#">OEORDD</a>	Order Details	OEORDD	<a href="#">OE0520</a> , <a href="#">OE0501</a> , <a href="#">OE0503</a> , <a href="#">OE0502</a> , <a href="#">OE0508</a> , <a href="#">OE0507</a>
<del><a href="#">OE0501</a> <a href="#">OEORDDO</a></del>	<del>Order Detail Optional Fields</del>	<del>OEORDDO</del>	<del><a href="#">OE0500</a></del>
<a href="#">OE0502</a> <a href="#">OEORDDD</a>	Order Kitting Details	OEORDDD	<a href="#">OE0500</a> , <a href="#">OE0504</a> , <a href="#">OE0506</a>
<a href="#">OE0503</a> <a href="#">OEORDDDB</a>	Order BOM Details	OEORDDDB	<a href="#">OE0500</a>
<a href="#">OE0504</a> <a href="#">OEORDDDS</a>	Order Kitting Serial Numbers	OEORDDDS	<a href="#">OE0502</a>
<a href="#">OE0505</a>	Pending Shipment Details	OEORDDI	
<a href="#">OE0506</a> <a href="#">OEORDDDL</a>	Order Kitting Detail Lot Numbers	OEORDDDL	<a href="#">OE0502</a>
<a href="#">OE0507</a> <a href="#">OEORDDL</a>	Order Detail Lot Numbers	OEORDDL	<a href="#">OE0500</a>
<a href="#">OE0508</a> <a href="#">OEORDDS</a>	Order Detail Serial Numbers	OEORDDS	<a href="#">OE0500</a>
<a href="#">OE0519</a>	Order-CRM Processing	OEORDG	<a href="#">OE0520</a> , <a href="#">OE0500</a> , <a href="#">OE0526</a>
<a href="#">OE0520</a> <a href="#">OEORDH</a> <a href="#">OEORDH1</a>	Orders	OEORDH	<a href="#">OE0500</a> , <a href="#">OE0999</a> , <a href="#">OE0180</a> , <a href="#">OE0740</a> , <a href="#">OE0526</a> , <a href="#">OE0522</a>
<a href="#">OE0521</a>	Pending Shipments	OEORDHI	
<a href="#">OE0522</a> <a href="#">OEORDHO</a>	Order Optional Fields	OEORDHO	<a href="#">OE0520</a>
<a href="#">OE0525</a>	Order Processing	OEORDP	<a href="#">OE0520</a> , <a href="#">OE0500</a> , <a href="#">OE0740</a> , <a href="#">OE0180</a> , <a href="#">OE0526</a> , <a href="#">OE0522</a> , <a href="#">OE0501</a> , <a href="#">OE0503</a> , <a href="#">OE0502</a> , <a href="#">OE0508</a> , <a href="#">OE0507</a> , <a href="#">OE0504</a> , <a href="#">OE0506</a> , <a href="#">TX0910</a> , <a href="#">TX0910</a> , <a href="#">AR0016</a> , <a href="#">AR0017</a>
<a href="#">OE0526</a> <a href="#">OEORDQ</a>	Order from Quotes	OEORDQ	<a href="#">OE0520</a>
<a href="#">OE0530</a> <a href="#">OEORPP</a>	Order Prepayments	OEORPP	
<a href="#">OE0533</a>	Order to Shipment Drilldown	OEORSH	
<a href="#">OE0535</a> <a href="#">OEPAUTH</a>	Order Pre-Authorization	OEPAUTH	
<a href="#">OE0538</a>	Customer Pending Amounts	OEPEND	
<a href="#">OE0540</a> <a href="#">OEPLAT</a>	Templates	OEPLAT	
<a href="#">OE0550</a>	Job Resource Validation	OEPMRES	
<a href="#">OE0560</a>	O/E Credit Note Posting	OEPOSTC	<a href="#">AR0031</a> , <a href="#">AR0032</a> , <a href="#">AR0033</a> , <a href="#">AR0034</a> , <a href="#">AR0402</a> , <a href="#">AR0401</a> , <a href="#">GP0950</a>
<a href="#">OE0580</a>	O/E Invoice Posting	OEPOSTI	<a href="#">AR0031</a> , <a href="#">AR0032</a> , <a href="#">AR0033</a> , <a href="#">AR0034</a> , <a href="#">GP0950</a> , <a href="#">AR0402</a> , <a href="#">AR0401</a>
<a href="#">OE0600</a>	O/E Order Posting	OEPOSTO	
<a href="#">OE0605</a>	O/E Shipment Posting	OEPOSTS	<a href="#">GP0950</a>
<a href="#">OE0620</a> <a href="#">OEPPRE</a>	Posted Prepayments	OEPPRE	<a href="#">OE0520</a> , <a href="#">OE0420</a> , <a href="#">OE0692</a>
<a href="#">OE0622</a> <a href="#">OEPPRED</a>	Posted Prepayment Details	OEPPRED	
<a href="#">OE0630</a>	Item Pricing	OEPRIC	
<a href="#">OE0633</a>	Report Services	OERPTS	
<a href="#">OE0634</a> <a href="#">OERSTR</a>	Restart	OERSTR	
<a href="#">OE0637</a> <a href="#">OEQTOD</a>	Promote Quote to Order Details	OEQTOD	<a href="#">OE0638</a>
<a href="#">OE0638</a> <a href="#">OEQTOH</a>	Promote Quote to Order Header	OEQTOH	<a href="#">OE0637</a>
<a href="#">OE0639</a>	Quote-to-Order Processing	OEQTOP	<a href="#">OE0638</a> , <a href="#">OE0637</a>
<a href="#">OE0670</a> <a href="#">OESHTDL</a>	Shipment Day End Lots	OESHTDL	<a href="#">OE0697</a>
<a href="#">OE0671</a> <a href="#">OESHTDS</a>	Shipment Day End Serials	OESHTDS	<a href="#">OE0697</a>
<a href="#">OE0675</a> <a href="#">OESHTDDL</a>	Shipment Day End Kitting Lots	OESHTDDL	<a href="#">OE0699</a>
<a href="#">OE0676</a> <a href="#">OESHTDDS</a>	Shipment Day End Kitting Serials	OESHTDDS	<a href="#">OE0699</a>
<a href="#">OE0681</a> <a href="#">OESHCD</a>	Shipment Cost-To-Clear Serials	OESHCD	<a href="#">OE0683</a>
<a href="#">OE0683</a> <a href="#">OESHCD</a>	Shipment Cost-To-Clear Details	OESHCD	<a href="#">OE0684</a> , <a href="#">OE0688</a> , <a href="#">OE0686</a> , <a href="#">OE0681</a>
<a href="#">OE0684</a> <a href="#">OESHCH</a>	Shipment Cost-To-Clear	OESHCH	<a href="#">OE0683</a>
<a href="#">OE0685</a> <a href="#">OESHDT</a>	Sales History Details	OESHDT	
<a href="#">OE0686</a> <a href="#">OESHCDL</a>	Shipment Cost-To-Clear Lots	OESHCDL	<a href="#">OE0683</a>



RotoID: OE0500

View: Order Details

RotoID: OE0500  
Table: [OEORDD](#)  
Protocol: Detail, Sequenced revisions, Key auto generate  
DLL:OEORDD

Compositions: 6

RotoID	Tables	Title	DLL
<a href="#">OE0520</a>	<a href="#">OEORDH</a> <a href="#">OEORDH1</a>	Orders	OEORDH
<a href="#">OE0501</a>	<a href="#">OEORDDO</a>	Order Detail Optional Fields	OEORDDO
<a href="#">OE0503</a>	<a href="#">OEORDDB</a>	Order BOM Details	OEORDDB
<a href="#">OE0502</a>	<a href="#">OEORDD</a>	Order Kitting Details	OEORDD
<a href="#">OE0508</a>	<a href="#">OEORDD</a>	Order Detail Serial Numbers	OEORDD
<a href="#">OE0507</a>	<a href="#">OEORDDL</a>	Order Detail Lot Numbers	OEORDDL

Keys: 7

Title	Fields
Uniq./Line Number	<a href="#">ORDUNIQ</a> , <a href="#">LINENUM</a>
Uniq./Detail Number	<a href="#">ORDUNIQ</a> , <a href="#">DETAILNUM</a>
Item/Exp. Shipment Date	<a href="#">ITEM</a> , <a href="#">EXPDATE</a> , <a href="#">ORDUNIQ</a> , <a href="#">DETAILNUM</a>
Exp. Shipment Date/Qty Ordered	<a href="#">EXPDATE</a> , <a href="#">DDTLTYPE</a> , <a href="#">QTYORDERED</a> , <a href="#">QTYBACKORD</a> , <a href="#">ITEM</a> , <a href="#">LOCATION</a>
Exp. Shipment Date/Qty Committed	<a href="#">EXPDATE</a> , <a href="#">DDTLTYPE</a> , <a href="#">QTYCOMMIT</a> , <a href="#">ITEM</a> , <a href="#">LOCATION</a>
Item/DtlType/ExpDate/Loc/LineTyp	<a href="#">ITEM</a> , <a href="#">DDTLTYPE</a> , <a href="#">EXPDATE</a> , <a href="#">LOCATION</a> , <a href="#">LINETYPE</a> , <a href="#">COMPLETE</a>
OrdUniq/Item/DtlType/ExpDate/Loc	<a href="#">ORDUNIQ</a> , <a href="#">ITEM</a> , <a href="#">DDTLTYPE</a> , <a href="#">EXPDATE</a> , <a href="#">LOCATION</a> , <a href="#">LINETYPE</a> , <a href="#">COMPLETE</a>

Fields: 213

Field	Index	Type	Title	Attributes	Presentation
<a href="#">ORDUNIQ</a>	1	BCD*10.0	Order Uniquifier	<a href="#">E</a> <a href="#">A</a> <a href="#">K</a> <a href="#">R</a>	
<a href="#">LINENUM</a>	2	Integer	Line Number	<a href="#">E</a> <a href="#">A</a> <a href="#">K</a> <a href="#">R</a>	
<a href="#">LINETYPE</a>	3	Integer	Line Type	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	List:2 entries 1=Item 2=Miscellaneous
<a href="#">ITEM</a>	4	String*24	Item	<a href="#">E</a> <a href="#">A</a> <a href="#">P</a> <a href="#">X</a>	Mask: %-24C
<a href="#">MISCCHARGE</a>	5	String*6	Miscellaneous Charges Code	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	Mask: %-6N
<a href="#">DESC</a>	6	String*60	Description	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	
<a href="#">ACCTSET</a>	7	String*6	Item Account Set	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	Mask: %-6N
<a href="#">USERCOSTMD</a>	8	Boolean	User-Specified Costing Method	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	
<a href="#">PRICELIST</a>	9	String*6	Price List	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	Mask: %-6N
<a href="#">CATEGORY</a>	10	String*6	Category	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	Mask: %-6N
<a href="#">LOCATION</a>	11	String*6	Location	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	Mask: %-6N
<a href="#">PICKSEQ</a>	12	String*10	Picking Sequence	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	
<a href="#">EXPDATE</a>	13	Date	Expected Shipment Date	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	
<a href="#">STOCKITEM</a>	14	Boolean	Stock Item	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	
<a href="#">QTYORDERED</a>	15	BCD*10.4	Quantity Ordered	<a href="#">E</a> <a href="#">A</a> <a href="#">X</a>	

# Have you ever wished you could build financials without having to write excel formulas?

- Sage 300 Intelligence Report Designer allows you to use a tool called the **Report Designer Layout Generator** to build and or copy financials without the requirement to build formulas.

# Have you ever wished you had a more “WYSIWIG” designer for building your financial statements?

- Sage 300 Intelligence Report Designer allows you to use a tool called the **Report Designer Task Pane** to build and or copy financials using a “WYSIWIG” style panel inside of Excel.

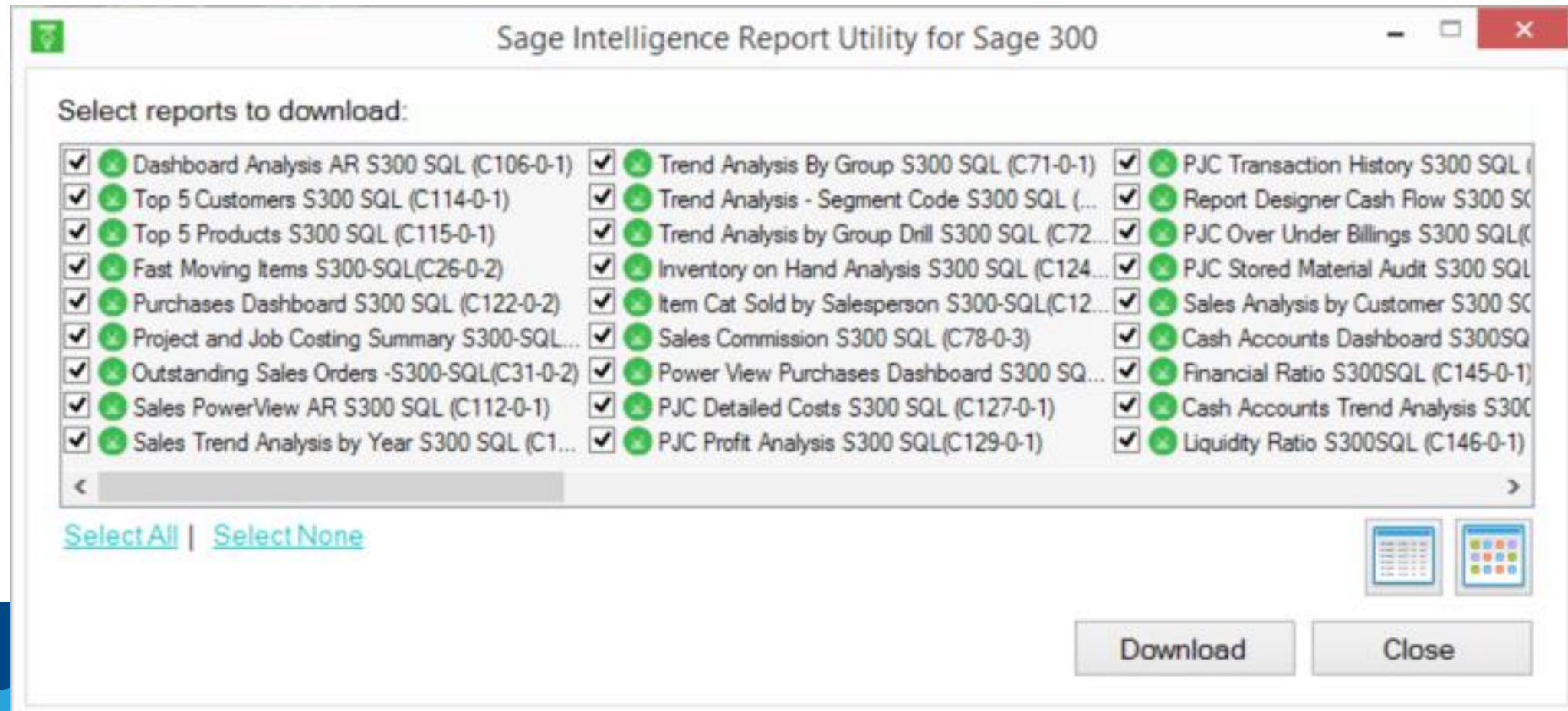
# How many of you export data from Financials and or Crystal Reports and manipulate the data manually EVERY MONTH?

- **Sage Intelligence Report Manager**



# Do you use Sage Intelligence but wish there were more reports available?

- **Sage Intelligence Report Utility**





# Sage Intelligence Reporting – Report Utility

All Sage products: <https://www.sageintelligence.com/report-utility/>

Sage 300 specific: <https://www.sageintelligence.com/report-utility/sage-300/>

Free reports suitable to  
your business needs



## Report Utility

The Report Utility allows you to select the reports you would like and automatically imports these reports into a "New Reports" folder in your Sage Intelligence Report Manager module.

**Download** >

Can't find the report you are looking for?  
We'd love to hear your report ideas.  
[Click here to submit your idea](#)

# Sage Intelligence Reporting – Report Utility – Standard Reports

Additional report templates can be found from the Report Template Utility or the Free Report Templates group on the Sage Intelligence Community

  
Introducing the  
**REPORT UTILITY**  
More free reports! Bigger and better platform.  
[View now](#)

Report
Financial Trend Analysis
GL Transaction Detail
Financial Report Designer: Layout Generator and Task Pane*
Financial Income Statement
Financial Balance Sheet
Financial Ratio
Dashboard Analysis
Dashboard Analysis AR
Inventory Master
Purchase Master
Sales Master
Sales Master AR

# What's New Sage Intelligence Reporting

## Integration with Sage CRM

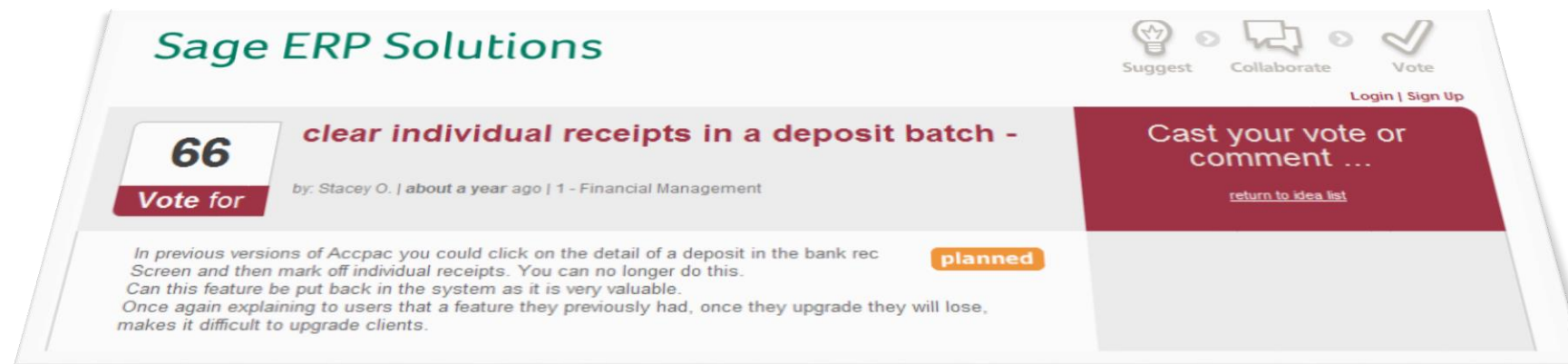
- The whitepaper I wrote up on this topic can be found here:

<http://bit.ly/WhitepaperSIttoCRM>



# Have you ever wanted to give Sage feed on one of our products?

- Help | Give us Feedback?

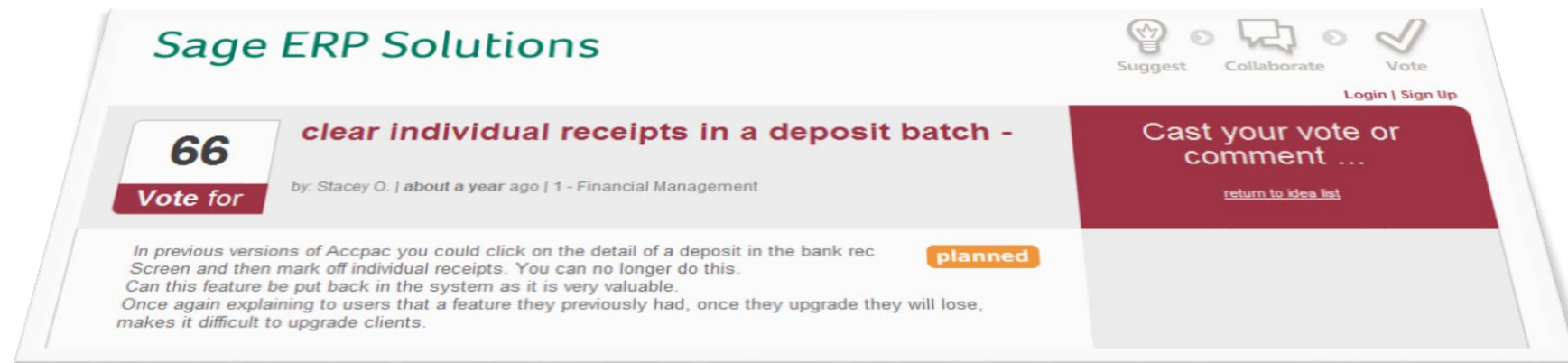


<https://www5.v1ideas.com/TheSageGroupplc/Sage300ERP> (Google "Search Sage 300 ideas")

# Have you ever wanted to know who is logged into Sage 300 right now?

- Help | LanPak Users...
- In the system and outside the system now!

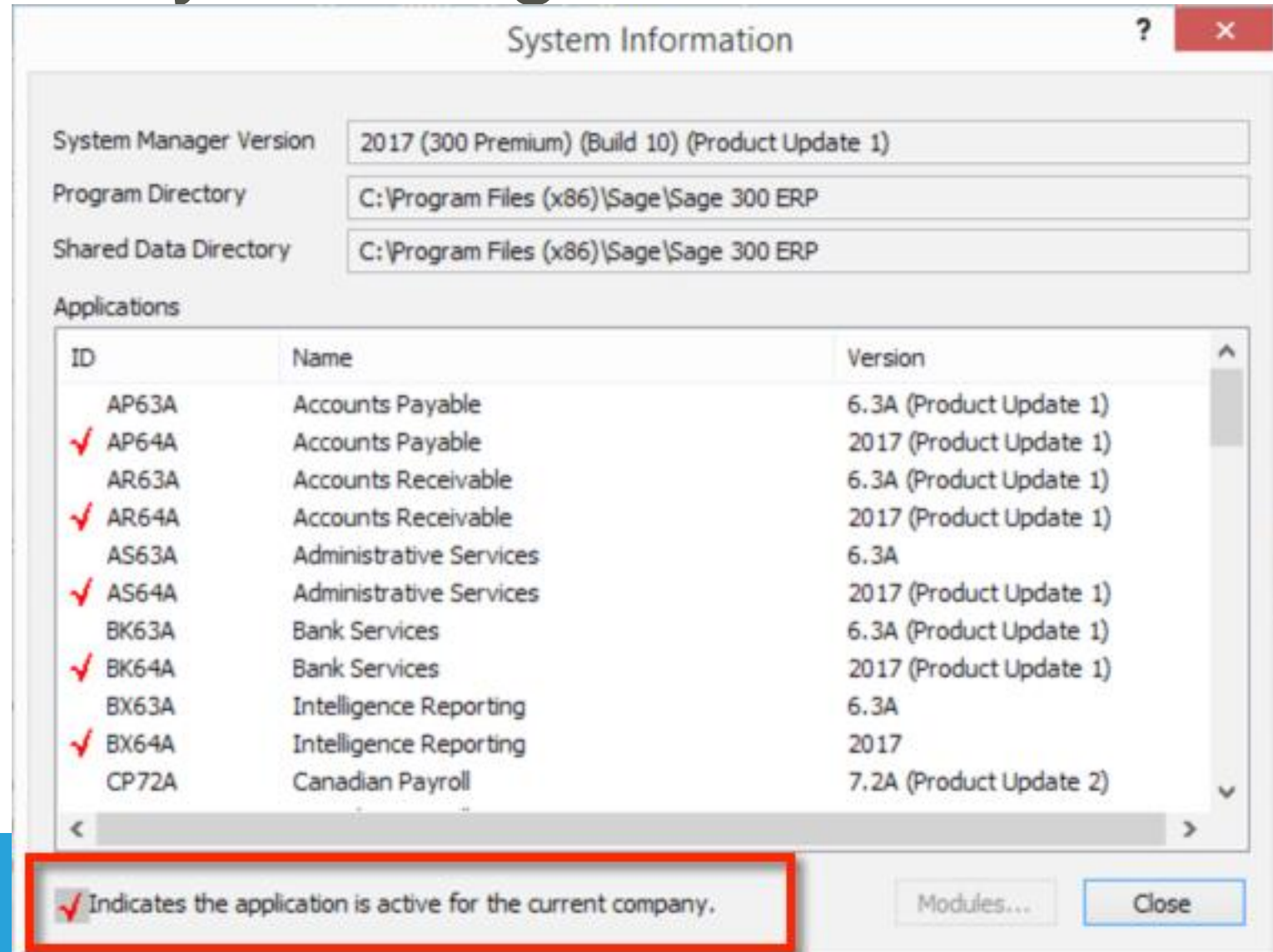
# Have you ever wondered what features other users of Sage 300 have wanted added to the product?



<https://www5.v1ideas.com/TheSageGroupplc/Sage300ERP> (Google "Search Sage 300 ideas")

# Have you ever wondered which modules do you have activated in your Sage 300 database?

- Help | System Information....



The screenshot shows the 'System Information' window in Sage 300. It displays system details and a list of applications. A red box highlights a legend at the bottom: '✓ Indicates the application is active for the current company.' The applications list includes Accounts Payable, Accounts Receivable, Administrative Services, Bank Services, Intelligence Reporting, and Canadian Payroll, each with a version number and a red checkmark indicating activation.

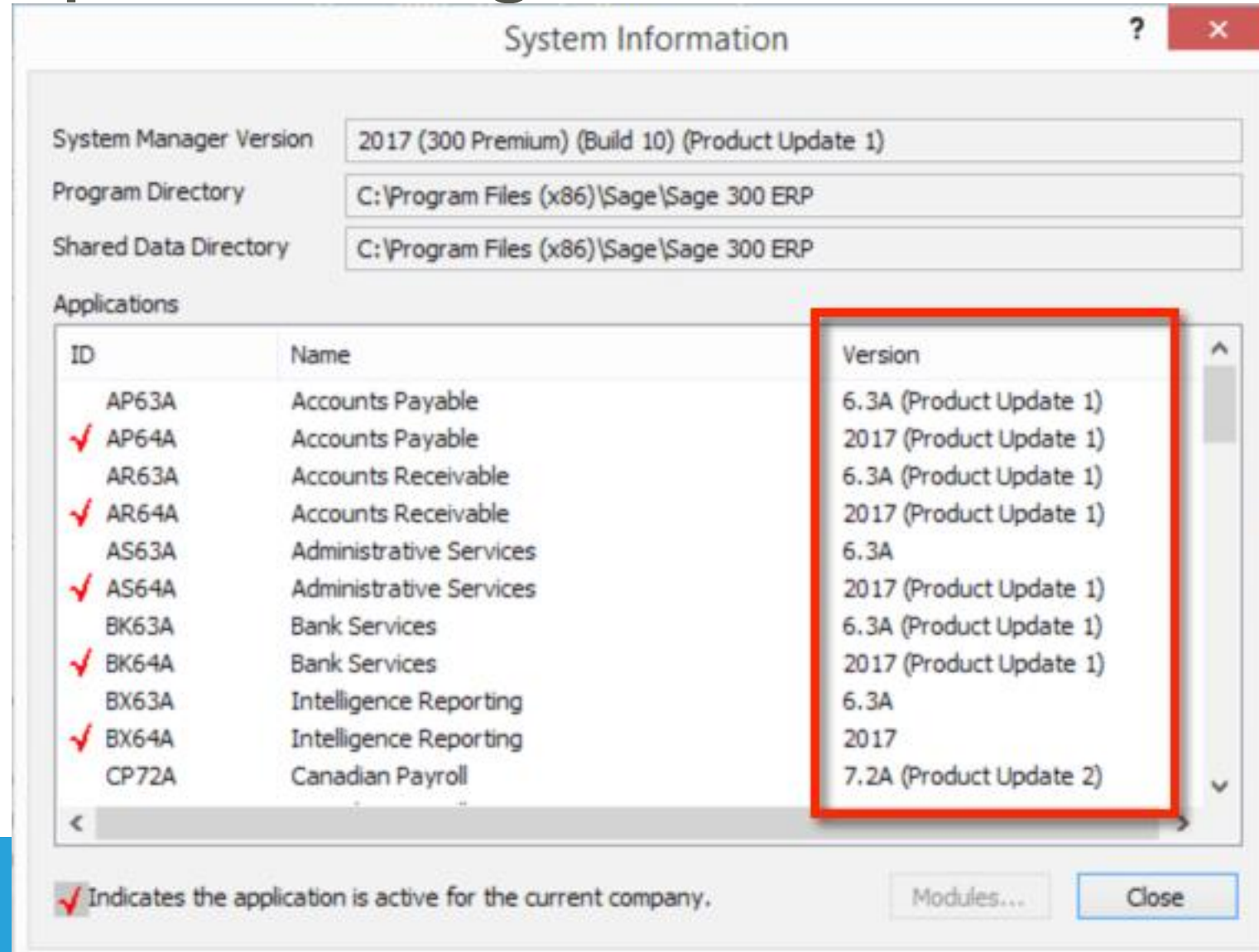
ID	Name	Version
AP63A	Accounts Payable	6.3A (Product Update 1)
✓ AP64A	Accounts Payable	2017 (Product Update 1)
AR63A	Accounts Receivable	6.3A (Product Update 1)
✓ AR64A	Accounts Receivable	2017 (Product Update 1)
AS63A	Administrative Services	6.3A
✓ AS64A	Administrative Services	2017 (Product Update 1)
BK63A	Bank Services	6.3A (Product Update 1)
✓ BK64A	Bank Services	2017 (Product Update 1)
BX63A	Intelligence Reporting	6.3A
✓ BX64A	Intelligence Reporting	2017
CP72A	Canadian Payroll	7.2A (Product Update 2)

Legend: ✓ Indicates the application is active for the current company.

Buttons: Modules..., Close

# Have you ever wondered which patch you have loaded for a specific Sage 300 module?

- Help | System Information....



The screenshot shows the 'System Information' window in Sage 300. The window title is 'System Information'. It contains the following information:

- System Manager Version: 2017 (300 Premium) (Build 10) (Product Update 1)
- Program Directory: C:\Program Files (x86)\Sage\Sage 300 ERP
- Shared Data Directory: C:\Program Files (x86)\Sage\Sage 300 ERP

Below this is a section titled 'Applications' which contains a table with three columns: ID, Name, and Version. The 'Version' column is highlighted with a red box. The table lists the following applications and their versions:

ID	Name	Version
AP63A	Accounts Payable	6.3A (Product Update 1)
✓ AP64A	Accounts Payable	2017 (Product Update 1)
AR63A	Accounts Receivable	6.3A (Product Update 1)
✓ AR64A	Accounts Receivable	2017 (Product Update 1)
AS63A	Administrative Services	6.3A
✓ AS64A	Administrative Services	2017 (Product Update 1)
BK63A	Bank Services	6.3A (Product Update 1)
✓ BK64A	Bank Services	2017 (Product Update 1)
BX63A	Intelligence Reporting	6.3A
✓ BX64A	Intelligence Reporting	2017
CP72A	Canadian Payroll	7.2A (Product Update 2)

At the bottom of the window, there is a legend: '✓ Indicates the application is active for the current company.' There are also buttons for 'Modules...' and 'Close'.

# Tools & Resources

# Tools & Resources – Sage Intelligence

## Brochures:

- Sage 300 Intelligence Reporting:
  - [http://na.sage.com/~media/site/erp/assets/whitepapers/SpecSheet\\_Sage3002014\\_140515](http://na.sage.com/~media/site/erp/assets/whitepapers/SpecSheet_Sage3002014_140515)
- Sage Enterprise Intelligence for Sage 300:
  - [http://na.sage.com/~media/site/erp/assets/misc/14-03993\\_ERP\\_SL\\_SageEnterpriseIntelligence-Update\\_R1](http://na.sage.com/~media/site/erp/assets/misc/14-03993_ERP_SL_SageEnterpriseIntelligence-Update_R1)
- Sage 300 Intelligence Reporting – FAQ:
  - <http://www.sagedl.com/sage-resources/Downloads/Sage300/Sage300CustomerFAQs-2016.pdf>

## Sage City Forums:

- Sage 300 ERP Intelligence Reporting Forum on Sage City:
  - [http://sagecity.na.sage.com/support\\_communities/sage300\\_erp/f/146.aspx](http://sagecity.na.sage.com/support_communities/sage300_erp/f/146.aspx)



# Tools & Resources – Sage Intelligence

## • Converting Sage 300 FR reports to Sage Intelligence:

- PDF:
  - <http://www.alchemex.org/FTPBICommunity/Sage300ERPFinancialReporter-to-Sage-Intelligence-Conversion-Guide.pdf>
- Video:
  - <https://youtu.be/1nkomZTUd3w>

## • Free eBooks:

- <https://www.sageintelligence.com/ebooks/>

## • Community site:

- Join Community to get free tips & tricks on Excel Newsletter
- <http://www.sageintelligencecommunity.com/>

## • Free Report Templates Group:

- <http://www.sageintelligencecommunity.com/group/freereporttemplates>
- Free Report Templates - Sage 300 ERP Intelligence Reporting:
  - <http://www.sageintelligencecommunity.com/page/free-report-templates-sage-300-erp-intelligence-reporting>
- Free Report Templates - Sage 500 ERP Intelligence Reporting:
  - <http://www.sageintelligencecommunity.com/page/free-report-templates-sage-500-erp-intelligence-reporting>





# Tools & Resources - Sage 300

- **Sage CRM Community site** – <http://community.sagecrm.com>
- **Sage 300 c Web Screen help** - <http://help.sage300.com/en-us/2017/web/index.htm>
- **Sage 300 documentation** - <http://cdn.na.sage.com/docs/en/customer/300erp/Documentation.htm>

# Tools & Resources – Sage CRM

- Sage CRM Help site – <http://help.sagecrm.com>
  - GREAT – Documentation, Support Matrix, any kind of documentation needed on and around Sage CRM is on this site!!!!
- Sage CRTM Community site – <http://community.sagecrm.com>
  - GREAT - Learning resources and very active community for help learning and using Sage CRM.

# Questions?



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Sage  
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# More questions? Let's talk!

Visit the Solution Area or email us at [sagesessions@sage.com](mailto:sagesessions@sage.com)

# Sage Summit Toronto

Join us in Toronto for two days of ideas, inspiration, and  
technology innovation

June 27 – 28, 2017 | Beanfield Centre | Toronto, Canada

Registration now open!

# Give us your feedback for a chance to win great prizes!



**Give us your feedback**

Thank you so much for attending Sage Sessions. Please take a moment to provide some feedback and help us learn more about your business. All surveys will be entered in a prize draw at the end of the day.

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Company \_\_\_\_\_ Email \_\_\_\_\_  
 # of Employees \_\_\_\_\_ Current Sage Product \_\_\_\_\_  
 I'm a: (Circle one) Customer Partner SAN Member Other

**Rate your level of agreement with the following (Circle)**

	Disagree	Agree
My business uses our current Sage solution to its fullest potential	1 2 3 4 5	
My business requirements are surpassing my current Sage product	1 2 3 4 5	
I learned things today that will have a positive impact on my business	1 2 3 4 5	

**Would you be interested in receiving a free Growth Consultation to explore how your software could better support your company's growth? (check box)**

☐ Yes, sign me up!  
☐ No, not at this time.  
☐ Maybe, please contact me with more information.

**Which of the following would be of value to your business? (check box)**

<input type="checkbox"/> More ways to accept payments	<input type="checkbox"/> Integrated e-commerce solution
<input type="checkbox"/> Business Intelligence tool	<input type="checkbox"/> Budgeting and planning tool
<input type="checkbox"/> Inventory planning and forecasting tool	<input type="checkbox"/> Anytime, anywhere access, on any device
<input type="checkbox"/> Accounts payable automation	<input type="checkbox"/> Empowering my team with product insight

**Rate the sessions you attended today:**

	Poor	Excellent
<b>10:30AM - 11:30AM</b>		
Solve your growing pains	1 2 3 4 5	
Benefits of a hybrid solution	1 2 3 4 5	
Take the shortcut with Sage 300	1 2 3 4 5	
The importance of Business Intelligence	1 2 3 4 5	
Mobility and bots with Sage One	1 2 3 4 5	
<b>11:30AM - 12:30PM</b>		
Priorities for growing small businesses	1 2 3 4 5	
Time-saving tips and tricks	1 2 3 4 5	
Opportunity of the e-commerce world	1 2 3 4 5	
Manage your customers better	1 2 3 4 5	
Cloud accounting in real-time	1 2 3 4 5	
<b>1:30PM - 2:30PM</b>		
Small business financials basics	1 2 3 4 5	
Is the cloud right for your business?	1 2 3 4 5	
Accelerating your business growth	1 2 3 4 5	
Your answer to X3	1 2 3 4 5	
Say good-bye to payables pains	1 2 3 4 5	
<b>2:30PM - 3:30PM</b>		
Master your cash flow to avoid a crisis	1 2 3 4 5	
Simplified payments processing	1 2 3 4 5	
Sage BusinessVision roadmap	1 2 3 4 5	
What lies ahead for Sage 300	1 2 3 4 5	
Becoming a people company	1 2 3 4 5	

Please hand your survey in at the registration desk for a chance to win one of many prizes. We hope to see you again at our next Sage event.

#SageSessions

sage sessions

# Thank you

# Bonus time:

- CTRL + scroll wheel = Screen size increases
- Shift + mouse drag
- Excel
  - End button then down arrow
  - End button then up arrow
  - End button then left arrow
  - End button then right arrow
  - Add Shift + End button then arrow = to highlight to end of range
  - CTRL + Page Up or CTRL + Page Down (switch between sheets on excel file)
  - Right Click on Tabs to see list of all Excel Tabs available



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