

December User Group Lunch & Learn Session Agenda:

9:00 am – 3:00 pm (lunch will be provided)

❖ Welcome and Introductions (9:00-9:15)

- Thank You, Housekeeping (Restrooms, Snacks, Coffee, Lunch), Folders, Survey, USB
- Company, Name, Position, Software
- Introduce Today's Topics

❖ Sage Roadmaps (9:15-10:00)

- Release Dates, Payroll Tax Updates
- Impact of "C" and new support plans from Sage to end users

Break (10:00-10:15)

❖ Year-End Closing Procedures (10:15-11:30)

- Year-End Tips & Tricks Sage 300 ERP (Accpac)
 - All Modules (GL, AP, AR, CS, BK, TX, IC, OE, PO & PR) - Includes Calendar Year-End Requirements Of Generating 1099's In AP & Creating W2's In Payroll
 - Quick Closing Procedures– Learn Minimum Steps Required To Close
 - Resetting 1099, W2 & Statistical Values Within Modules
- Year-End & Period-End Reporting
- How To Create The New Year
- How to Back Up Sage 300 Databases prior to using Year-End/Period-End Procedures

❖ Reporting with Sage 300 ERP (11:30-12:00)

- Reporting with FR - Financial Reports (included in Sage 300 GL) (11:30-12:00)
 - Future life of reporting with FR
 - Options to replace FR

Lunch (12:00-12:30)

- Reporting with Sage Business Intelligence (included with Sage 300) (12:30-2:00)
 - Overview To Learn The New Features & Functions Options to replace FR
 - How To Get Key Metrics For Management
 - How to migrate FR reports to Sage Business Intelligence
 - Benefits of Financial Designer (add on product)
- Other reporting options (2:00-2:15)
 - Sage Enterprise Business Intelligence (**New**)
 - DataSelf
 - Renovo
 - Others

❖ Question and Answers – Open Discussion (2:15-2:30)

❖ Sage Intelligence Labs (Hands On Machines Available) (2:30-3:00)

- Sage Business Intelligence Financial Report Designer
- Sage Business Intelligence Creating Reports With Report Manager
- DataSelf Reporting
- Sage Enterprise Intelligence

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