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Discover Sage 300Cloud

Sage 300cloud web screens bring the power of Sage 300 to your web browser. Whether you're using your desktop computer, your laptop, or your tablet, now you can enter transactions, generate reports, manage company finances, and more—anywhere, anytime. Web screens run in parallel with the classic Sage 300 desktop screens, so there's no need to choose between desktop or web. Everyone in your organization can use the interface that best suits their needs, while working seamlessly with a single shared set of company data. Read on for a quick overview of what's available in Sage 300cloud web screens.

Depending on your purchase agreement, some features described here may not be available in your product.

Home Page

Use the home page to find and open program features and reports; to review key business information; and to find help and resources.

- Find and open program features and reports. On the home page, use the navigation menu to find and open program features ("windows") and reports. After opening a feature or report, click the Help menu to browse related help articles and find additional resources.
- Navigate between open windows and reports. Use the Window Manager at the right of the screen to switch between open windows, or to close windows.
- Review key performance indicators for your business. Add and set up widgets on the home page to see key business information at a glance.

Administration and User Management

Use administration and user management features to set up your company, add and manage user groups, and maintain your data.

- Set up your company. Create your company profile and optional fields, specify currency settings, and set up your fiscal calendar.
- Manage users and security. Set up security for your system and assign users to security groups.
- Maintain your data. Check data integrity and review restart records to resolve data issues and recover from errors.

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Financial Management

Use financial modules to set up your general ledger, maintain banking and tax information, and manage payables and receivables.

- General Ledger. General Ledger supports multicurrency accounting, integrates extensively with other program features, and supports import and export of transaction data for use with other programs. Set up and maintain your general ledger accounts, enter or transfer transactions from various sources, and print reports.
- Bank Services. Bank Services centralizes payments and receipts for all Sage 300 accounting features. Set up bank information, track and manage payments and receipts, reverse payments, return NSF items, perform reconciliations with bank statements, and create General Ledger batches for information from bank statements and miscellaneous monthly transactions.
- Tax Services. Tax Services centralizes tax information on sales and purchases for all Sage 300 accounting features. Set up tax tables, tax calculation rules, and tax audit information.
- Accounts Payable. Accounts Payable handles all your payables record keeping and reporting needs. Set up and maintain vendor accounts; enter or import transactions; print checks; and track vendor account and transaction details on screen and on printed reports.
- Accounts Receivable. Accounts Receivable handles all your receivables record keeping and reporting needs. Set up and maintain your customer accounts; enter or import transactions; print invoices; and track account and transaction details on screens and on printed reports.

Operations Management

Use operations modules to process payments, manage inventory, and process customer and vendor transactions.

- Payment Processing. Set up Payment Processing to process credit card payments from your customers.
- Inventory Control. Inventory Control maintains detailed perpetual inventory records and produces reports to help you manage your stock effectively. Set up and track inventory items, enter and post transactions, and print reports.
- Order Entry. Order Entry handles all your order entry, invoicing, and order tracking needs, regardless of the size and complexity of your business. Process orders and shipments, track transaction details and sales information, and print invoices, quotes, order confirmations, picking slips, credit notes, debit notes, and shipping labels.
- Purchase Orders. Purchase Orders provides all the transaction entry, processing, and reporting features you need to fully automate your purchase order procedures and meet your management needs. Enter and process purchase requisitions, purchase orders, receipts, vendor invoices, returns, credit notes, and debit notes, and print forms and mailing labels for your vendor transactions.

Reports

Print financial reports, transaction reports, and other key business information.

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Data Entry Tools

The following data entry tools help you enter and manage information in Sage 300 screens.

Tool	Name	Description
	Context Menu	The context menu appears next to some data entry fields, and displays a list of available options related to a field. For example, the context menu for the **Ship-To Location** field may display the following options: • **View Ship-To Location** • **Edit Ship-To Location**
	Collapse All / Expand All	Click to collapse or expand all expanding sections on a screen.
	Date Selector	Click the date selector button to view a calendar and select a date.
	Finder	The Finder appears in some data entry fields, and in some table headings on transaction entry screens. Click it when you want to look up records you can select for a field. When using the Finder, you can specify selection criteria to help you find records. For example, when looking up G/L Accounts, you might specify the following criteria: Account Number starts with 21 You can also click the **Edit Columns** button to add or remove columns from the table of results that appears in the Finder, or to rearrange the order in which columns appear.

Tool	Name	Description
↵	Go Button	The Go button appears on screens where you must specify a record (such as a code) before viewing details for the record. After entering the code or name of the record, click this button to view details for the record.
?	Help Icon	The Help icon appears next to fields for which help content is available. Point to the icon to see the help.
+	New Button	The New button appears next to fields where you can add a new record. For example, where it appears beside a **Customer Number** field, click this button to add a new customer.

Tools in data entry tables

Tool	Description
+ Add Line	Click **Add Line** to add a new line to a detail entry table.
Delete Line	Click **Delete Line** to delete a selected line from a detail entry table.
Edit Columns	Click **Edit Columns** to see a list of columns in a detail entry table. You can select the check box for a column to add it; clear the check box to remove it; and drag columns up and down in the list to arrange them in the detail entry table.
(Edit button)	Click the Edit button to open a new screen where you add or edit additional information for a detail. For example, where this button appears in a **Taxes** column, click the button to edit tax information for the detail.
Page 2 of 3 (Page navigation)	Click the Previous and Next buttons to navigate through a list of existing records, or click the First and Last buttons to navigate to the first and last records. You can also enter a page number in the Page field and press Enter to skip to that page.
Refresh	Click **Refresh** to refresh the information displayed in the detail entry table.

Buttons

Button	Description
Create New	Click **Create New** to create a new record. For example, on the A/R Customers screen, click this button to create a new customer record.
Delete	Click **Delete** to delete the displayed record. If you cannot delete a record, an error message explains why it cannot be deleted.
Print	Click **Print** to print a report after you have specified settings and criteria for records to include in the report.
Save	Click **Save** to add a new record you have created, or to save changes you have made to an existing record.

Keyboard shortcuts for data entry

Use the following keyboard shortcuts to speed up data entry.

Key	Action
Enter	Apply changes to the field you are editing.
Tab	Go to the next field.
Pg Up	Go to the top of the window in view.
Pg Dn	Go to the bottom of the window in view.
Shift+Tab	Go to the previous field.
Alt + Down Arrow	Open the Finder for the field you are editing (if there is a Finder for the field). Rarely, this shortcut may not work. If this happens, try the following: • Press Tab to select the Finder and then press Enter to open it. • If you use the Chrome browser, turn off its Autofill feature. For more information, see Sage Knowledgebase article 108348.
Esc	Close Finders, pop-up screens, and messages. This keyboard shortcut may not work for all screens and messages.

Keyboard shortcuts for detail tables

Use the following keyboard shortcuts to navigate and enter information in detail tables.

Key	Action
Enter	Apply changes to the field you are editing.
Left or Right Arrow	Scroll left or right in the table.
Shift+Tab	Go to the previous field.
Tab	Go to the next field.
Type page number and press Enter	In detail tables that display multiple pages of information, go to a specific page.
Up or Down Arrow	Go up or down one row.

Support

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