



Brochure

Manage Your Company with One Powerful Business Management Solution

Today, more than 25,000 companies worldwide trust Sage 300 to manage their business. A tried and true solution with a rich heritage offering the flexibility of in-house, or cloud hosted deployment, let us help you take your business to the next stage with our powerful, trustworthy business management solution.

Sage

 EQUATION
TECHNOLOGIES



Designed for Growing Companies

In order to continue your growth trajectory, you know you need more advanced tools. The home-grown software or carefully modified Excel worksheets of yesteryear aren't working for you anymore. You need a new tool to connect your disparate departments together. You want something flexible and powerful. You need something capable of scaling as you move to new markets, buy and sell companies, and consolidate your corporate structure. You need Sage 300.

Designed for Scale

Sage 300 focuses on providing best in class financial tools. We are very good at helping companies manage multiple entities such as subsidiaries or franchises. For companies that operate internationally, we offer multi-currency capabilities and multilingual interfaces.

Add What You Need

Sage 300 is uniquely positioned to help your company grow and add needed software confidently. We offer a catalogue of modules to help your business manage everything from finances, to project tracking, to managing sales and inventory. Here is a list of available modules available within the Sage 300 platform for you to add as needed.

Cloud Deployment

Give your teams access to key company information wherever they're working from by storing your data in the cloud. Sage 300 works with any cloud provider. Your business partner can help identify which cloud provider (Microsoft Azure, Amazon Web Services, etc...) works best for your needs.

Finance Tools

General Ledger	Set up and maintain your general ledger accounts. Enter or transfer transactions from various sources. Print a number of key accounting reports such as general ledger reports, including a chart of accounts, trial balance, posting journal, and transactions listing.
General Ledger Consolidation	For companies with multiple entities, our General Ledger Consolidation module helps provide the reporting needed to generate key financial reports for the corporate entity.
Intercompany Transactions	You can set up multiple companies, close books, and report results by company or consolidated company. Automate transactions that affect more than one of your companies. For example, a purchase order from one company will automatically become an Accounts Receivable entry in the other connected company.
Accounts Receivable	Understand your expected cash flow so you can plan for the future. Send invoices, track customer accounts and provide transaction details on demand.
Accounts Payable	Set up and maintain your vendor accounts, enter or import transactions from various sources, and print checks. Accounts Payable produces the reports you need to avoid late payment charges, secure vendor discounts, and match cash requirements to cash resources.
Instant Bank Reconciliations	Bank Reconciliation automates and simplifies the monthly reconciliation process. Detect unrecorded transactions and correct differences between your books and your bank account.
AP Withholding & Reverse Charges (for Tax Calculations)	Manage tax implications in your invoices like a breeze. AP Withholding helps you direct payable taxes to your tax authority directly while Reverse Charges enable you to calculate the taxes due on an invoice for self-assessment.

Project and Vendor Management

Project and Job Costing	Control project costs better. Track costs and revenue down to the finest details on every project. Manage contractors and subcontractors for their time, and related expenses. Track & monitor original project timelines and status. All costs, payables, and receivables can roll up to each area of the project. Overhead, equipment, and materials are allocated to ensure the project is on time and on budget. This module integrates with Microsoft Project.
Multiple Contacts	Manage accounts and correspondence like a breeze. This module enables you to attribute many stakeholders to an account or project. It also integrates with Microsoft Outlook so you can have the details you need in responding to a customer right there in your Outlook screen.

Sales Processes

Send e-invoices

We've partnered with Stripe and PayPal to build a Pay Now button which can be popped onto any invoice you create. Payments, taxes collected, and processing fees will be automatically entered into Sage 300 to save your team time.

Payment Processing

Process credit and debit card transactions directly in Sage 300.

Order Entry

Manage a transaction throughout its sales lifecycle. Use the Order Entry module to enter orders or sales returns. Print invoices, quotes, order confirmations, picking slips, credit notes, debit notes, and shipping labels.

Order Entry is fully integrated with Inventory Control and Accounts Receivable, so you always know your inventory levels and the status of your customer accounts. It also integrates fully with Project and Job Costing, so you can sell merchandise that includes components such as labor, service, or contacting costs.

Purchase Order

Automate your purchase order procedures to make putting in an order easier than ever. Enter and process purchase requisitions, purchase orders, receipts, vendor invoices, returns, credit notes, and debit notes. You can also print forms for your requisitions, purchase orders, receipts, returns, and mailing labels.

Transactions in Purchase Orders update item quantities and costs in Inventory Control, and create batches of invoices, credit notes, and debit notes in Accounts Payable.

Withhold Taxes

Sage 300 allows you to withhold taxes by percentage or by flat amounts in your sales transactions. Record of how much was withheld and by whom to make tax time a little easier

Inventory Tools

Inventory Control

Inventory Control maintains detailed perpetual inventory records and produces reports to help you manage your stock effectively.

Regardless of the size and complexity of your business, you can adapt Inventory Control to meet your needs. Inventory Control easily handles the requirements of your existing inventory system and offers many flexible features you can use to manage your inventory effectively.

Serialized Inventory & Lot Tracking

Automatically generate serial numbers or lot numbers to items to help you keep better control of your stock.

The Sage 300 Ecosystem

While Sage 300 provides the foundation you need to support a growing business, we know every business is different. That's why we offer our customers the option to add additional software from Independent Software Vendors, (ISVs). Our strong support of ISVs started when the product was first introduced in the 90s and we continue to support this ecosystem to this day. Our open API means any ISV has the ability to integrate with Sage 300.



As Sage has evolved, we've partnered with exceptional ISVs to create Sage-endorsed add-ons. These distinguished solutions commit to our extensive QA processes and agree to maintain their code base to support the latest Sage 300 releases.

Predictable and Affordable Subscription Platform

Sage 300 prides ourselves in providing our customers with a great solution at a great value. Our subscription pricing enables businesses to predict their cost of usage accurately and enables our customers to plan for the future. We offer cost-saving bundles which allows our customers to get the most out of Sage 300 without having to order every module a-la-carte. For customers who want to add additional Sage 300 modules or users, pricing is clear and implementation is easy.





About Equation Technologies

Equation Technologies provides business management solutions for mid-sized companies in the USA and Canada. We make carefully crafted recommendations from among the industry's best-performing ERP software, including Sage Intacct and Sage 300. We help you **reduce the risk in choosing and implementing solutions** by:

- Listening closely to your challenges and exactly how your business works.
- Developing processes that match your business, not requiring you to conform to a software system.
- Mapping out efficiencies using technology to improve operations without adding staff.

Our main goal is simple: have a clear understanding of our clients' goals. We believe the only way to sufficiently grasp that information is by listening first, and offering valuable advice later. We also know that one single approach is not right for all businesses. We leverage our team's vast education and business experiences across industries to focus on our clients' unique needs. We understand the importance of your business. We know when you call on us, time is of the essence and we value & respect your time.

Equation Technologies
533 2nd Street Encinitas, CA 92024
866-436-3530
www.equationtech.us