sage Business Cloud

Accounting

Customer Learning Curriculum
UK & Ireland

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Sage University offers a comprehensive portfolio of training solutions for a variety of roles and skills to meet the education requirements of your organisation helping you get a head start, improve productivity and minimise compliance risks.

With options such as anytime learning, instructor led training, certifications and learning packages; and subjects ranging from fundamentals through to advanced level, Sage University provides the tools you need to thrive.

Get Started

(Free of charge)

Whether you are a trial user or have recently purchased Sage Business Cloud Accounting, we recommend these courses are taken, in order, to provide everything you need to get started. Courses include:

- Bookkeeping Essentials
- Getting Up and Running In 5 Steps
- Get It Right From Set Up

On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!

Get Started

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Tip: *Click the name of each course to view in Sage University*

Bookkeeping Essentials

This 2 hour interactive eLearning course includes over 50 topics that will benefit users new to bookkeeping or those who need to reacquaint themselves with accounting basics.

This course is product agnostic and applicable to most all country legislations. In this course you will learn the purpose of accounts and working with ledgers, about debits and credits and the categories they fall into along with how they make up transactions, set up a fictitious company and apply what you have learned by completing activities; and construct a standard P&L and Balance sheet report

Getting Up And Running In 5 Steps ☆ Most Popular Course

This series of courses takes you from the very first step of logging into your new software, right through to seeing a real time view of your business.

Over 2 hours the 5 courses introduces you to key features and functionality in the software. We recommend you take each course in the order listed, for the maximum benefit. As you go through the courses you will experience real-life business challenges and how Accounting can help, use hands on 'try it out' tasks with on screen guidance and checks along the way to help you think about your own business, and a short quiz to check your knowledge

Get It Right from Set Up

By the end of this short course you will be able to understand how to set up your business from scratch, enter in Customers and Suppliers, add in Products and Services, set up bank accounts and manage and set up your Accounting settings

Accounting Day-To-Day

(Free of charge)

Your Sage Business Cloud Accounting software is fast, intuitive, and full of features to enable to you to process your day –to-day transactions with ease. The free courses in this section cover everything you will need to process quickly and with confidence. The courses in this section are:

- Day-To-Day Processing
- Accounting Mobile App
- Simple Inventory
- Accounting For Cash

On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!

Accounting Day-To-Day

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Tip: *Click the name of each course to view in Sage University*

Day-To Day Processing

Get your business process running smoothly with this jam-packed course that covers everything you need to know to take care of your day-to-day business transactions in Accounting. By the end of this course you will be able to:

- View the summary
- Raise a Sales Invoice, Credit Note, Quote & Estimate
- Raise a Purchase Invoice & Credit Note
- Record Quick Entries
- View a Journal

Accounting Mobile App

Sage Accounting is at your fingertips no matter where you are! It's so easy with the Mobile App. In this course, discover how the Accounting mobile app makes it easy to run your business on the go by recording expenses, recording and chasing customer invoices, and viewing your financial information.

Simple Inventory

Save time and money by using Accounting to track the items you purchase and sell, so that you have the right products on hand at the right time, fulfilling your customer needs. Create stock, non-stock and service items, track item quantities and use reporting to track the purchase and sale of your stock items.

Accounting Day-To-Day

Tip: *Click the name of each course to view in Sage University*

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Accounting For Cash

Discover how Sage Business Cloud Accounting simplifies bookkeeping for your cash business by enabling you to easily record transactions for which you do not have invoices. This course includes top tips from the experts at Sage to save you time, give you an accurate view of how your business is performing, and prevent panic when it's time to submit your tax documentation.

Automate Your Banking

Learn how you can save time by automating your banking and getting your money working for you.

Get Paid Faster

In this course you will explore how to use an online payment processor with Accounting to improve cashflow into your business.

Stay Compliant

(Free of charge)

Once you begin recording transactions within your Sage Business Cloud Accounting, you can use the software to ensure you remain compliant with your tax responsibilities. The courses in this section are:

- UK Making Tax Digital
- Compliance & VAT
- EU VAT E-Commerce*
- Construction Industry Scheme (CIS)*
- CIS Domestic Reverse Charge*

On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!

*if applicable to your business

Stay Compliant

Tip: *Click the name of each course to view in Sage University*

UK Making Tax Digital - April 2022

This course covers Making Tax Digital and the upcoming changes including Mandated MTD for VAT in April 2022 and MTD for Income Tax Self Assessment in 2023; as well as a recap on MTD so far

Compliance & VAT

Managing your taxes needn't be taxing. From setup to generating, calculating and submitting your return, this module shows you how to stay compliant with VAT.

EU VAT E-Commerce

This course covers the background to the OSS and IOSS legislation. You cover changes you need to think about and we demonstrate these changes in Sage Accounting.

Construction Industry Scheme

Suitable for businesses in the construction industry, this course gives you an overview of the Construction Industry Scheme (CIS), including Domestic Reverse Charge. You also cover how to activate and utilise the CIS module in Sage Accounting.

CIS Domestic Reverse Charge

Suitable for businesses in the Construction Industry, this course will help you understand the new CIS Domestic Reverse Charge legislation and how to process under the new legislation in Sage Business Cloud Accounting.

Get Insight & Make Decisions

(Free of charge)

One of the key goals for any business is to make sure you're making enough money to cover your purchases and other costs, and have some left over! Good record keeping is essential and now you're using Sage Accounting, you'll be able to track your income and expenses with ease, analyse key business metrics and produce detailed reports. The courses in this section are:

- Checking The Health Of Your Business
- Sage Intelligence Reporting
- Make Business Decisions Through Reporting & Analysis

On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!!

Get Insight & Make Decisions

Tip: *Click the name of each course to view in Sage University*

Checking The Health Of Your Business

☆ Most Popular Course

Get your business process running smoothly with these jam-packed courses that covers everything you need to know to take care of your day-to-day business transactions in Accounting. We recommend taking the courses in the order shown, for the maximum benefit.

Course 1 - Taking the pulse of your business
Whether a major corporation or a sole trader, every business needs to keep an eye on its health.

Course 2 - Understanding reports
Knowing which reports to run and how to read them is essential when running a thriving business.

Course 3 - Additional features
Apart from the essential and everyday reports, there are further ways to interrogate the data in Accounting.

Sage Intelligence Reporting

In this course you will learn how to produce your own financial reports, copy and edit a report and how to add your company's logo, new columns and calculations to take reports to the next level.

Make Business Decisions Through Reporting & Analysis

Sage Accounting makes it easy to get great insight into your business. Find out how you can help your business to thrive using Reporting and Analysis.

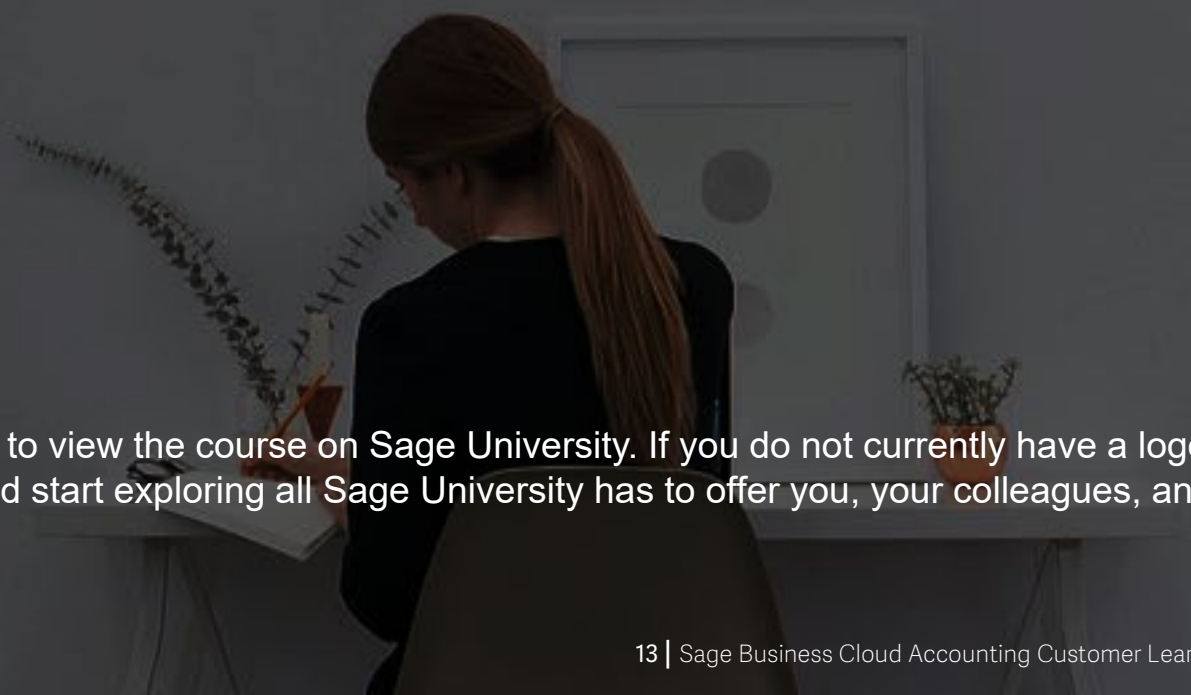
- Set up VAT Schemes and Submission Frequencies
- Generate a VAT Return
- Calculate and Submit a HMRC VAT Return
- Review HMRC Submission Responses

Switched From Sage 50

(Free of charge)

If you have switched from Sage 50 to Sage Business Cloud Accounting, we have a number of training modules dedicated to helping you get started and confidently using your new software, including:

- Introduction to Accounting
- Settings & Set Up
- Sales
- VAT
- Products & Services…..and many more



On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!!

Switched From Sage 50

Tip: *Click the name of each course to view in Sage University*

Introduction to Accounting

A tour to get you familiar with navigation and the main menu in Sage Business Cloud Accounting.

Accessing Sage Accounting

Learn how simple and easy it is to access your Sage Business Cloud Accounting.

Settings & Set-Up

This course guides you through the five areas on the Settings menu - Invoicing & Business, Financial, Connect, Customise, and Opening Balances.

Period End

This course guides you through the Period End process in Sage Business Cloud Accounting.

Contacts

This course looks at your Contacts in the system; your customers and suppliers.

Sales

This course covers the four options in the Sales menu; Quotes & Estimates, Sales Invoices, Sales Credits, and Quick Entries.

Tip: *Click the name of each course to view in Sage University*

Switched From Sage 50

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Adjustments & Journals

A guide to making adjustments in Sage Business Cloud Accounting.

Reporting

Explores gaining insights via the reports available to you in Sage Business Cloud Accounting.

VAT

Learn how to create and reconcile the VAT Return and pay the VAT.

Purchases

This course guides you through processing purchase invoices, purchase credits and using Quick Entries.

Products & Services

This course looks at how to use products and services in Sage Business Cloud Accounting.

Banking

This course covers Setting Up, Manual Data Entry, Bank Feeds and Reconciling within the Banking area of your software.

New Release Training

(Free of charge)

We continually develop your Sage Business Cloud Accounting software to not only ensure you are compliant with the latest tax legislation, but also to add more and more useful features to make your day-to-day processing quicker, easier and more effective. The courses in this section detail our newly released features:

- Multi-Currency Banking
- Banking Automation and Efficiency

On the following pages, simply click the name of the course to view the course on Sage University. If you do not currently have a logon for Sage University, this would be a great time to create one and start exploring all Sage University has to offer you, your colleagues, and your business!

New Release Training

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Tip: *Click the name of each course to view in Sage University*

Multi-Currency Banking

A short course to walk you through setting up and working with multi-currency banking. Learn how to enable exchange rates for your chosen currencies and set up multi-currency bank accounts.

Banking Automation & Efficiency

Learn how to boss your banking with Accounting by automatically importing bank transactions from a bank feed, your bank statements, and AutoEntry.

Free Live Webinars

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Join a Sage expert on our FREE live webinars or access recordings

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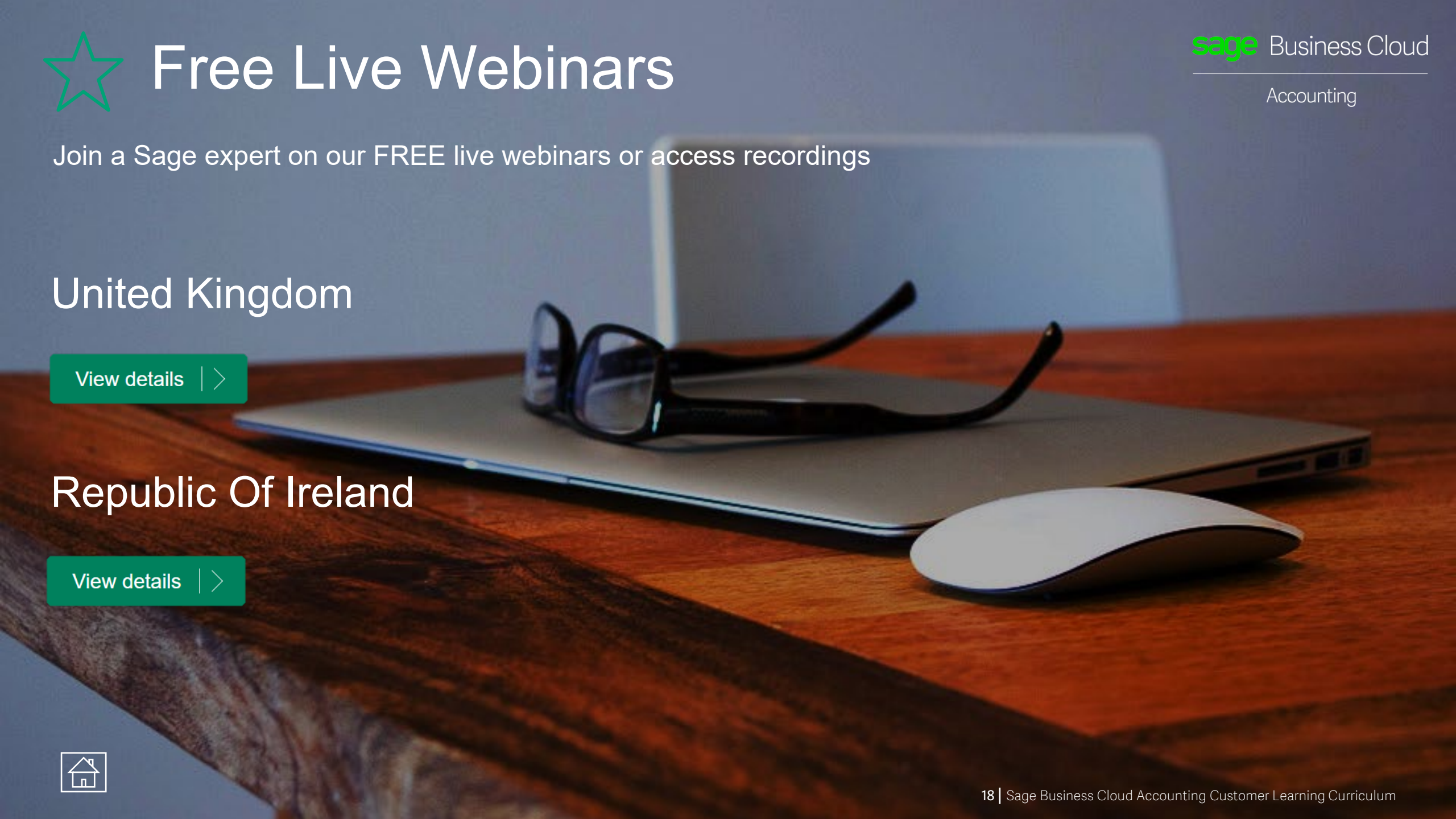
View details

Republic Of Ireland

View details



Get Certified

(Free of charge)

Stand out from the crowd and show the world you know how to use Sage software. After taking Part in our training courses why no take the next logical step and become certified – free of charge!

Sage Certification is a simple but valuable way to show you're great at using our software. And it's the only certification programme approved by Sage.

Upon successful completion of the certification exam, you will become a Sage Business Cloud Accounting Application Specialist – and what's more the exam is open book, meaning you can use your program, notes, or online help during the assessment.

View details

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