Course Curriculum 2022/2023

Sage 50cloud Accounting Training Catalogue

Sage is committed to your success. Whether you are a professional, have experience with Sage products, or are just starting, our training options will help you contribute to your company's overall success. Training can be found on Sage University: **www.sageu.com/Sage50CA**

Sage

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Available training methods:

Anytime learning packages

Instructor-narrated step-by-step videos bundled together into one package.

These packages are either:

- single-user
- or company-wide subscriptions and are valid for 12-months.

Self-study training guides

Choose between:

- an eBook (12-month subscription)
- or get a hard copy shipped to you directly (shipping fees at your own cost).

Sage

New to Sage 50?

Start here with our wide range of **free** training:

Basic installation

This video will walk you through the steps of a typical Sage 50 installation.

Topics/Videos: 1
Duration: +6mins
Price: FREE

Introduction to bookkeeping

This course introduces you to bookkeeping, accounting equations and financial statements.

Topics/Videos: +3
Duration: +9mins
Price: FREE

Navigating in Sage 50

This course will show you how to navigate the program and introduces you to the session date and uses of dates in Sage 50.

Topics/Videos: +2
Duration: +12mins
Price: FREE

Setting up a company

This course walks you through the steps of creating a new company file and configuring company settings, and you will learn what historical transactions are and where historical details can be found.

Topics/Videos: +3
Duration: +12mins
Price: FREE

Get started with general ledger

This course introduces you to the chart of accounts and how to create, modify, and delete accounts.

Topics/Videos: +2
Duration: +6mins
Price: FREE

Get started with customers

This course will show you how to add customer information, and you will learn one method for creating sales invoices and where to find the customer aged report.

Topics/Videos: +2
Duration: +8mins
Price: FREE

Get started with vendors

This course will show you how to add a vendor, and you will learn one method for creating Purchase invoices and where to find the vendor-aged report.

Topics/Videos: +2
Duration: +8mins
Price: FREE

Get started with inventory

This course will show you how to add an inventory item, and you will learn one method for creating Purchase invoices and where to find the inventory report.

Topics/Videos: +3
Duration: +12mins
Price: FREE

Get started with projects

This course will show you how to set up a project.

Topics/Videos: +3
Duration: +12mins
Price: FREE

Get started with payroll

This course will show you how to add an employee, and you will learn one method for creating paycheques and how to open the employee detail report.

Topics/Videos: +2
Duration: +7mins
Price: FREE

Get the combined package: Learn the Basic

This learning package combined all of the above training into one.

Topics/Videos: +24
Duration: +1.5hrs
Price: FREE

Moving from Sage 50 desktop to Sage 50cloud?

Learn about the Sage 50cloud features in this free course:

Sage 50 to Sage 50cloud

This course is for customers moving from Sage 50 desktop to Sage 50cloud and who want to understand the connected services accessible with Sage 50cloud.

Learn about:

- Remote Data Access
- AutoEntry
- Microsoft 365 integration
- Sage Contact
- Sage Cloud Backup
- Sage Dashboard

Topics/Videos: +19
Duration: +1.5hrs
Price: FREE

Using remote data access?

Our free course will guide you through the process:

Remote Data Access

This course is for customers interested in understanding Remote Data Access, a feature accessible with the Sage 50cloud. After completing this training, you will be able to:

- Explain what Remote Data Access is
- Setup and use Remote Data Access
- Manage users and troubleshoot Remote Data Access

Topics/Videos: +5
Duration: +30mins
Price: FREE

First time running a year-end?

Our free course will guide you through the process.

Year-end and compliance

This course is for customers responsible for completing payroll (calendar) and fiscal year-end and CRA compliance, including sales tax remittances. You will learn how to start a new payroll (calendar) and fiscal year-end and the many associated tasks required for compliance and remittance.

In addition, company consolidation and tax maintenance are tasks that often correspond with year-end and maintenance functions; these are also covered in this course.

Course Outline:
- Sales Tax Setup
- Sales Tax Reports
- GST/HST Payment or Refund and PST Payment
- Filing GST/HST Online
- Sales Tax for Non-Profits
- Fiscal and Calendar Years
- New Calendar Year
- New Fiscal Year
- Transactions in Various Periods
- Company Consolidation

Topics/Videos: +1
Duration: +1.5hrs
Price: FREE

Sage

Become a pro in Sage 50.

Our comprehensive learning packages will help you become a pro in no time:

Accounting modules

Learn how to install Sage 50 and set up Users, Roles, Company, and User Settings. You'll also learn how to set up and process:

- Receivables,
- Payables,
- General Ledgers,
- Banking,
- Budgets,
- and Sales Taxes.

Course Outline:
- Explain the basics of bookkeeping and accounting
- Install Sage 50 in a single-user and in a multi-user environment
- Create a Sage 50 company
- Add and modify users and roles
- Modify the company settings and user preferences
- Enter opening balances for accounts, and historical transactions for customers and vendors
- Use the Receivables module
- Use the Payables module
- Use the General ledger
- Process banking transactions
- Enable and modify budgets
- Use direct depositing / pre-authorized debits options
- Store and process credit cards
- Upgrade your product yearly
- Set up and modify sales taxes

Learning package:
Duration: +7hrs
Price: $439

Take the assessment:
Set yourself apart and get certified:
Price: $89

(for 2-attempts)

Payroll module

This course focuses on payroll setup, employee setup, group benefits and maintenance, payroll runs, direct deposits, reimbursements, advances and loans, vacation pay, etc.

Course Outline:
- Prepare everything needed before starting processing payroll in Sage 50
- Set up and use payroll incomes
- Set up and use payroll deductions
- Set up and use user-defined expenses
- Add, modify, and remove employees
- Enter opening balances for employees
- Create paycheques
- Set up and use benefits
- Set up and use group benefits
- Set up and use reimbursements
- Issue advances and loans
- Set up and use payroll entitlements
- Pay commission to employees
- Pay accrued vacation
- Process payroll remittances
- Generate the Pensionable and Insurable Earnings Review (PIER) report
- Submit T4, RL-1, and ROE forms
- Update employee claims and WCB rates
- Set up and use PRPP and VRSP
- Use direct deposit options for payroll

Learning package:
Duration: +2.5hrs
Price: $219

Take the assessment:
Set yourself apart and get certified:
Price: $89
(for 2-attempts)

Power user

This comprehensive course will give you the knowledge and skills necessary to set up:

- Inventory,
- Projects,
- Foreign currency,
- Reports and forms, departments,
- Time and billing,
- Enhanced productivity features,
- Year-end.

Course Outline:
- Use the inventory and services module
- Set up and use projects in transactions
- Set up and use foreign currency
- Modify the report settings and generate reports and forms
- Complete fiscal and calendar year ends
- Set up and use departments
- Use the time and billing feature
- Use enhanced productivity features like recurring transactions and the Daily Business Manager

Learning package:
Duration: +4hrs
Price: $219

Take the assessment:
Set yourself apart and get certified:
Price: $89
(for 2-attempts)

Combined curriculum

This package is a **company-wide subscription** and consists of the following learning packages:

- Sage 50 – Accounting Modules
- Sage 50 – Payroll Module
- Sage 50 – Power User

Topics/Videos: +176
Duration: +7hrs
Price: $712

Application specialist

This course focuses on the advanced features of Sage 50, including:
- Advanced inventory,
- Advanced projects,
- Import and export,
- Data management,
- Company consolidation.

Course Outline:
- Use advanced inventory features
- Use advanced projects features
- Import and export data
- Manage Sage 50 data
- Use consolidated companies

Learning package:
Duration: +2hrs
Price: $109

Take the assessment:
Set yourself apart and get certified:
Price: $89
(for 2-attempts)

Learn more about a specific feature.

Our popular individual training topics will help get you up and running in no time:

Company Setup

Learn how to install the program, set up users and roles, and customize the company and user settings, along with best practices and troubleshooting

Duration: +2hr
Price: $99

General Ledger

Learn basic bookkeeping concepts; how to set up or modify Chart of Accounts; create miscellaneous transactions, and enter opening balances.

Duration: +2hr
Price: $99

Receivables

This course is for customers who want to learn how to configure the Receivables module and set up customers in Sage 50.

Duration: +2hr
Price: $99

Payables

This course is for customers who want to learn how to configure the Payables module and set up vendors in Sage 50.

Duration: +2hr
Price: $99

Banking

This course is for customers who want to take full advantage of all the features available in the Banking module.

Duration: +2hr
Price: $99

Inventory

Learn how to purchase, sell, transfer, adjust, and assemble inventory.

Duration: +2hr
Price: $99

Projects, Departments and Budgets

Learn how to set up company budgets, departments and projects, and how to allocate to departmental accounts or projects.

Duration: +2hr
Price: $99

Reports, Forms and Emails

Learn to customize invoices, paystubs and other forms, and reports.

Duration: +2hr
Price: $99

Foreign Currency

Learn how to configure foreign currencies in Sage 50 and how to record purchases and sales using a foreign currency.

Duration: +2hr
Price: $99

Time and Billing

Learn how to enter data once, use it across multiple modules, and access valuable reports.

Duration: +2hr
Price: $99

Time saving tips

Learn about features that will increase their productivity with Sage 50.

Duration: +2hr
Price: $99

Payroll setup and day-to-day

Learn how to set up the Payroll module and how to process paycheques individually or in a batch.

Duration: +2hr
Price: $99

Payroll advanced

Learn how to configure group benefits, reimbursements, advances, loans, entitlements, commissions, vacation pay, and payroll remittances.

Duration: +2hr
Price: $99

Already a pro in Sage 50?

Learn about the latest features or get certified:

New product releases and updates

Did you know? With each version release, we create a what's new video so that you can learn more about the new feature(s).

Price: FREE

Get certified

Set yourself apart from the crowd and get certified.

Price: $89 per assessment

Sage University instructions:

Follow these step-by-step instructions to sign up online:

1. Visit **www.sageU.com/Sage50CA**

2. New to Sage University? Select your product and then **Create a profile**.

3. To create a Sage University profile, you will need to log on to your **Sage account**.

4. If you don't already have a Sage account, you can create one using the "**Create account**" link found at the bottom of the login page.

5. You will need access to your email to retrieve a validation code to create your Sage account.

6. **View FAQs** about your Sage account login to learn more.

7. Once you've logged on to your Sage account, complete the Sage University profile creation form and **get started**!

   NOTE: Creating a Sage University profile is a one-time task. Once complete, you will log on to access Sage University

For help navigating Sage University, call **855-724-3864** or email **SageUniversity@Sage.com**.

Sage account versus Sage University profile

Your Sage account allows you to access different Sage products and services through a single log-on.

Fewer passwords to remember are a win for everyone!

Your Sage University profile is your personal record of training, badges, and certifications completed on Sage University.
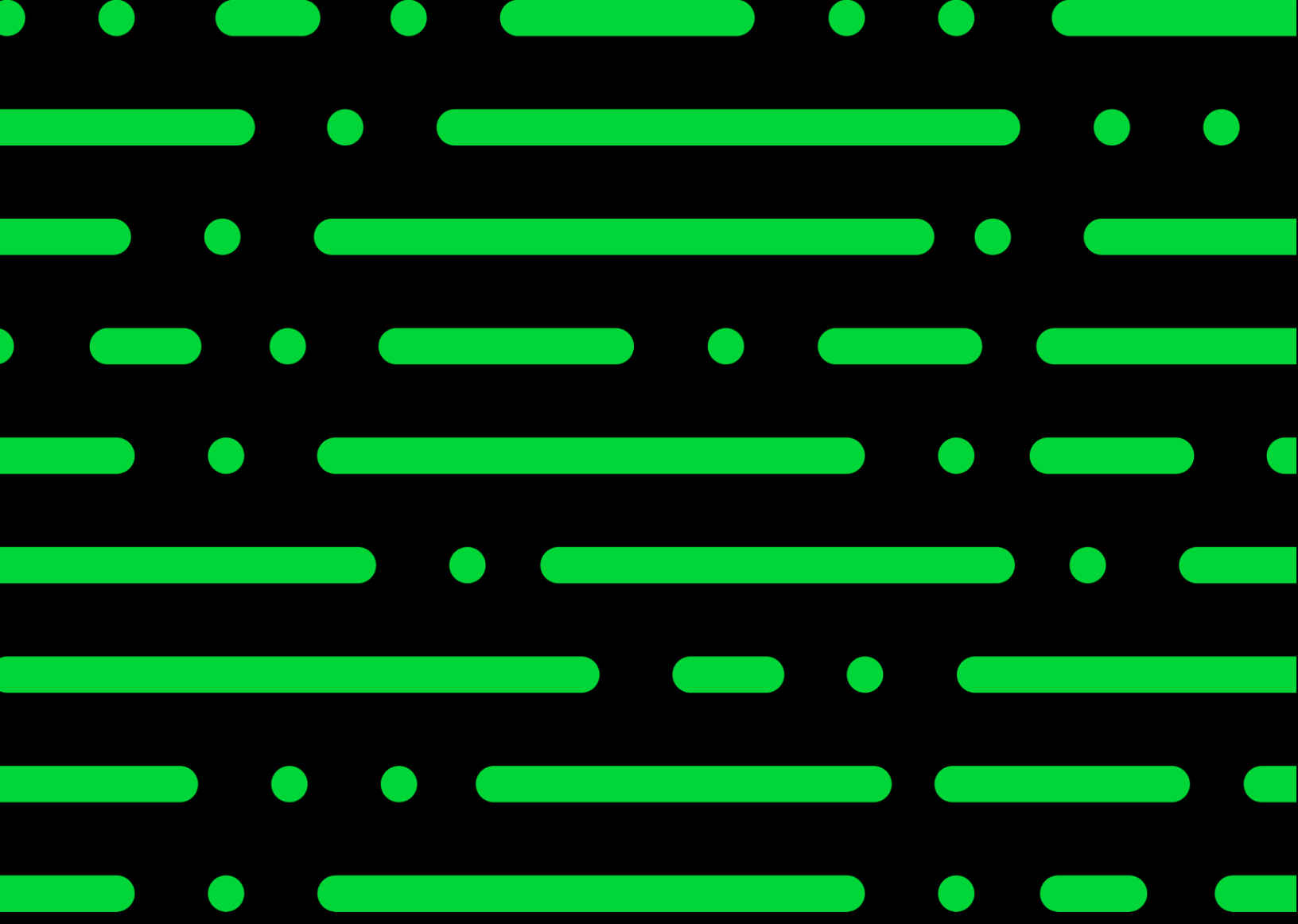
Price disclaimer:

Prices and availability are subject to change without notice. While we strive for accuracy, mistakes happen. In the event of an incorrect price on a quote or order, you will be notified by email or phone and given the option to accept the corrected price or cancel the order.

Savings	Favourite with our customers

Sage