sage 50

Training Catalogue

Training is applicable to Sage 50 and Sage 50cloud

2022
Course Curriculum

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

Training methods includes:

Anytime learning packages

Instructor-narrated step-by-step videos bundled together into 1 package. These packages are other single-user or company-wide subscription and 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 own cost).

Complimentary anytime learning packages:

Learn the basic

New to Sage 50? Start with this learning package. Learn how to install your Sage 50 product and to navigate through the program. You will also learn how to create company files, set up customers, vendors; employees; and your general ledger.

Topics: +20
Duration: +1hr
FREE

Year-end and compliance

Learn how to start a new payroll (calendar) and fiscal year end, as well as many associated tasks that are required for compliance and remittance.

Topics: +10
Duration: +1.5hrs
FREE

Sage 50 to Sage 50cloud

This course is designed for customers who are moving from Sage 50 Accounting (desktop) to Sage 50cloud and want to learn how to use the features included in the Sage 50cloud.

Topics: +19
Duration: +1.5hrs
FREE

AutoEntry

AutoEntry seamlessly integrates with your Sage Solution to eliminate manual data entry by capturing your invoices, receipts, and statements automatically.

Topics: +19
Duration +2hrs
FREE

Remote Data Access

Learn more about Remote Data Access (formerly Sage Drive) and how you and remote colleagues can work in Sage 50cloud from anywhere.

Topics: +3
Duration +1hr
FREE

Releases and Updates

Learn how: to install Sage 50; set up Users, Roles, Company, and User Settings. Learn how to set up, use and report on: Receivables, Payables, General Ledger, Banking, Budgets, and Sales Taxes.

Topics: +5
Duration +30mins
FREE

Supplementary anytime learning packages:

Combined Curriculum

The Combined Curriculum is a learning package made up of the following training courses: Sage 50 Accounting Modules, Payroll Module, and Power User.

Topics: +176
Duration +12hrs
$712

Accounting Modules

Learn how: to install Sage 50; set up Users, Roles, Company, and User Settings. Learn how to set up, use and report on: Receivables, Payables, General Ledger, Banking, Budgets, and Sales Taxes.

Topics: +80
Duration +16hrs
$439

Payroll Module

Learn payroll setup, employee setup, group benefits and maintenance, payroll runs, direct deposits, reimbursements, advances and loans, vacation pay, and more.

Topics: +30
Duration: +2hrs
$219

Power User

Learn how to set up, user and report on inventory, projects, foreign currency, departments, time and billing, enhanced productivity features, and how to prepare and complete a year end.

Topics: +50
Duration: +3hrs
$219

Application Specialist

Learn about advanced inventory, advanced projects, import and exporting, data management, and company consolidation.

Topics: +25
Duration: +2hrs
$109

Individual Training Topics:

Our individual training topics have 2 different training methods to choose from, to suit your busy schedule:

PRE-RECORDED WEBINAR SESSION:	**SELF-STUDY GUIDE:**
Includes eBook Duration: +1.5hrs **$99**	Choose between eBooks or hardcopy **$49**

Company Setup

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

Course Outline
- Typical and Advanced Installation
- New Company Setup
- Sage 50 Interface
- Users and Roles
- Company Settings
- User Preferences
- Best Practices
- Product Updates and Upgrades

General Ledger

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

Course Outline
- Bookkeeping Introduction
- Chart of Accounts Setup
- Linked Accounts and Control Accounts
- General Journal
- History Mode
- Opening Balances

Receivables

Learn how to configure the Receivables module and set up customers in Sage 50. You will learn how to record various sales transactions, collect customer payments, and use reports and statements to better keep track of your receivables and to improve your cash flows.

Course Outline
- Receivables Settings
- Customers
- Sales Invoices
- Sales Quotes, Sales Orders, Delivery Orders
- Credit Notes and Debit Notes
- Sales Receipts and Deposits
- Customer Statements
- Invoice Payments
- Receivables Reports
- Pre-Authorized Debit Options

Payables

Learn how to configure the Payables module and set up vendors in Sage 50. You will learn how to record various purchase transactions, pay vendors, and use reports to better keep track of your payables. You will also learn about electronic payment options in Sage 50 to pay vendors via direct deposit.

Course Outline
- Payables Settings
- Vendors
- Purchase Invoices
- Purchase Quotes, Orders, Goods Received Notes
- Credit Notes and Debit Notes
- Vendor Payments and Prepayments
- T4A and T5018 Slips
- Payables Reports
- Direct Deposit Options

Banking

Learn how to create bank and cash accounts; record deposit slips; transfers funds; reconcile bank and credit card accounts; and to use Sage Bank Feeds to automatically download bank or credit card transactions into Sage 50

Course Outline
- Bank and Cash Accounts
- Deposit Slips
- Account Reconciliation
- Sage Bank Feeds and Bank Statement Imports
- Banking Reports

Inventory

Learn how to set up inventory and service items; as well as, how to purchase, sell, transfer, adjust, and assemble inventory

Course Outline
- Inventory Settings
- Service Items
- Inventory Items
- Price Lists
- Locations
- Categories
- Purchases and Sales
- Adjustments and Transfers
- Assembly Features
- Inventory Reports

Projects, Departments and Budgets

Learn how to allocate income and expenses to projects (or job sites) and/or departments and keep track of income and expense projections, also known as budgets for company, departments and/or project accounts. You will learn how to set up company budgets, departments, and projects, and how to allocate to departmental accounts or projects. You will also learn how to generate valuable reports for each of these features.

Course Outline
- Budgets Setup, Updates, and Imports
- Budget Reports
- Departments Setup and Departmental Budgets
- Departments in Transactions
- Departmental Reports
- Project Setup and Project Budgets
- Project Allocation and Project Reports

Reports, Forms and Emails

Learn to customize invoices, pay stubs and other forms (using the built-in Form Designer); how to perform mail-merge functions with Microsoft Office documents, and how to customize emails to send .PDF attachments, such as customer invoices

Course Outline
- Reports and Forms Settings
- Form Customization with the Form Designer
- Email Options
- Report Centre
- Report Customization
- Industry-Specific Reports
- Microsoft Office Documents

Foreign Currency

Learn how to configure foreign currencies in Sage 50 and how to record purchases and sales using a foreign currency. You will learn how to set up various foreign currency records, process transactions with a foreign currency, calculate a gain or loss on foreign exchange, and display foreign currency accounts on your financial reports.

Course Outline
- Foreign Currency Setup
- Foreign Currency Records
- Sales and Purchases
- Bank Transfers and Journal Entries
- Duty on Imports
- Foreign Currency Corrections
- Foreign Currency Reports

Time and Billing

Learn to enter data once, use it across multiple modules, and access valuable reports. You will learn how to set up billable and non-billable services, enter timeslips to keep track of employee hours worked and services delivered, add billable hours to invoice customers, add hours worked to pay employees, add hours worked to pay contractors (for Quantum users only), and customize associated reports.

Course Outline
- Time Slips Setup
- Time Slips Transactions
- Customer Billing
- Employee Paycheques
- Time Slips for Contractors (Quantum)
- Time and Billing Reports

Time Saving Tips

Learn about features that will increase your productivity, including: Fast Data Entry, Enhanced Productivity Features, and Importing and Exporting Data.

Course Outline
- Shortcut Links and Keyboard Shortcuts
- Tabbing Orders
- Recurring Transactions
- Daily Business Manager
- Quick Company Search
- Payment Methods
- Automatic Backups
- Mass Updates
- Checklists
- Mailing Labels
- Dashboards
- Report Templates
- Data Import/Export

Payroll Setup and Day-to-Day

Learn how to set up the Payroll module and how to process paycheques individually or in a batch. You will also learn about electronic payment options in Sage 50 to pay employees via direct deposit.

Course Outline

- Initial Preparation and Payroll Options
- Incomes
- Deductions
- Taxes
- User-Defined Expenses
- Employees
- Individual Paycheques
- Paycheques in a Batch
- Direct Deposit Options

Payroll Advanced

Learn about advanced features in the Payroll module of Sage 50 such as how to configure group benefits, reimbursements, advances, loans, entitlements, commissions, vacation pay, and payroll remittances, as well as, how to generate various forms for your employees

Course Outline

- Benefits and Group Benefits
- Reimbursements
- Advances and Loans
- Entitlements and Commission
- Vacation Pay
- Payroll Remittance
- Expense Groups
- T4 Slips and Summary as well Relevé-1 Slips
- Record of Employment (ROE) Forms
- Payroll Maintenance
- PRPP and VRSP

Sage University instructions:

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

1. Visit **SageU.com**
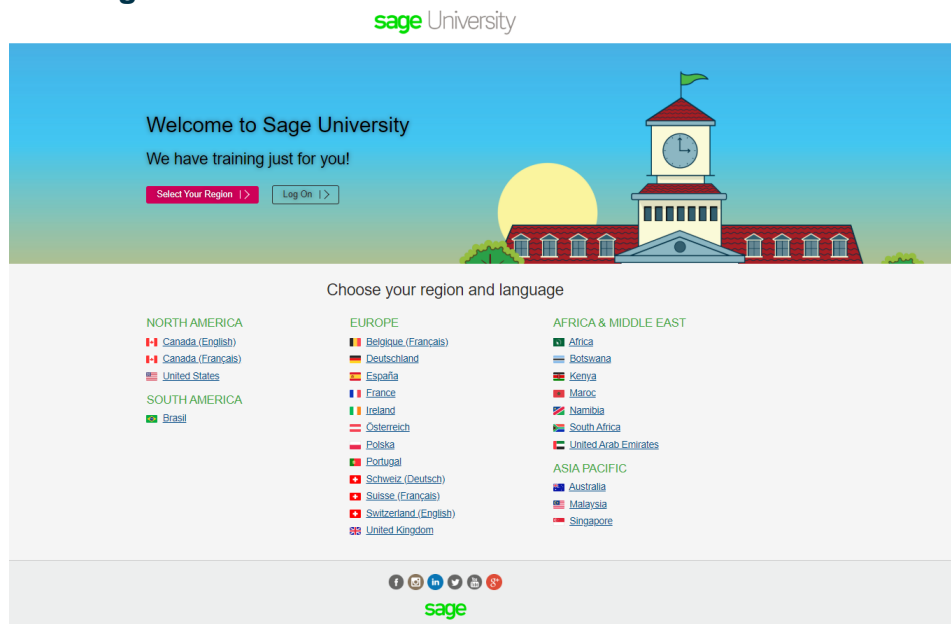
2. Select your region
3. New to Sage U? Select your product and then Create your profile.
4. Complete the form. **Make sure you enter your account number as this will active your discounts based on your Sage Business Care Plan**.
5. Put your password in a safe place.
6. Select Log on.
7. Select Get started to choose your required training
8. Once you select your course, log on anytime to view your Sage U account details, launch training sessions from your transcript, and print completion certificates.

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

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.