sage 50
Canadian Edition

2017

Customer Training

Catalogue

Introduction

Committed to developing the right training solutions for your needs

Sage product training solutions help you improve your proficiency in your accounting and payroll software. Whether you're a professional, have experience with Sage products, or are just starting out, our courses will help you contribute not only to your company's overall success, but to the success of your career. Our professional training team will provide you with the knowledge and guidance you need to succeed.

Why attend Sage training?

- Send employees on training to get the most benefit from your Sage product
- Improve work flows, increase productivity, and reduce the time it takes to learn how to use the product yourself
- Seek out the knowledge and experience that only Sage can provide
- Learn from trainers that understand Sage products inside and out, and provide a high standard of training
- Advance your career by earning Sage competency certificates
- Separate yourself from other candidates when seeking employment in the accounting and payroll industries

The value of Sage certification

Obtaining a Sage certification should be a priority as it signifies:

- The ability for an employee to deliver a significant return on investment using Sage products
- Competency in performing tasks related to Sage software
- The determination and ability of an employee to complete a task
- The ability to apply skills immediately after completing accreditation training
- A globally accepted means of assessing an essential set of abilities

Completing a Sage assessment

To make it easier for our customers, all Sage assessments are conducted online. This means:

- You can write your assessment on your own time and in the comfort of your own home
- Some of our assessments are open book

What is Sage University?

Sage University is the ultimate resource for all your Sage training needs. It gives you the freedom to choose the courses and methods that best suit your business and learning style. It even includes free resources to help you get started. The courses you choose will help you master each application, maximize your software investment, and streamline your workflow, so you can deliver more value to your clients.

How Sage University works?

Step 1: Log onto **SageU.com**

Step 2: Select your topic of interest

Step 3: Decide on a learning method that suits you

Step 4: Start studying!

Step 5: Advance your career with Sage Certification

Step 6: Repeat and keep your certification up to date

Training Methods

We have a variety of training methods available to help you become an expert in Sage to fit your busy lifestyle, saving you both time and money:

In-person training

Hands-on labs

Traditional, in-person classes scheduled for a specific time, date, and location.

Seminars

In-person presentations led by an instructor, scheduled for a specific time, date, and location.

Live online training

Virtual hands-on labs

Online courses that allow you to view presentations, interact with learning resources, and work in groups—all in the comfort of your own home.

Real-time learning

Online, instructor-led seminars scheduled for a specific date and time. Log on from your phone or high-speed Internet-connected computer for live instructor and participant interaction.

Self-study

Anytime learning

These courses offer self-paced, recorded videos, available whenever and wherever you are. All you need is a computer, speakers, and a high-speed Internet connection.

Self-study training guide

This option allows you to complete your training and work at your own pace. Good for those that prefer traditional training manuals.

Training Course Details

Level 1: Sage 50 Learn the Basics

Overview

In this course you'll learn how to install and navigate your new Sage 50 product. You'll also learn how to create your company, customer, vendor, and employee files, as well as your general ledger.

Target Learners

Customers who want to get up and running as quickly as possible.

Entrance Requirement:

None

Delivery Method

This course is available using the following training method:

Anytime learning

Duration

This course takes approximately 1 hour to complete.

Course Outline

- Basic installation (single-user)
- Navigation
- How to create a company file?
- What is a customer and where to set it up?
- What is a vendor and where to set it up?
- What is an employee and where to set it up?
- What's is a general ledger and where to set it up?
- Cloud overview
- Training options available

Assessments

- No assessment available for this course

Training Course Details

Level 2: Sage 50 Accounting Modules

Overview

This course is designed for customers who want to understand the essentials in Sage 50 Accounting. You'll learn how to install Sage 50, 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.

Target Learners

Customers who want to get a fundamental understanding of their Sage 50 Accounting product.

Entrance Requirement:

Level 1: Learn the Basics (recommended)

Delivery Method

This course is available using the following training methods:

Anytime learning
Hands-on lab
Virtual hands-on lab
Self-study guide

Duration

This course takes approximately 16 hours to complete.

Course Outline

- Before you start
- Introduction to bookkeeping
- Advanced installation
- Users and roles
- Company settings and user preferences
- History mode for customers, vendors and accounts
- Receivables
- Payables
- General ledger
- Banking
- Budgets
- Direct depositing / pre-authorized debits options
- Credit card processing
- Upgrading your product yearly
- Sales taxes

Assessments

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book.
- You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 120 days from registration date, so remember to take the exam before it expires.

Level 2: Sage 50 Payroll Module

Overview

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

Target learners

Customers who want a comprehensive understanding of their Sage 50 Payroll module.

Entrance requirements

Level 1: Learn the Basics (recommended)

Delivery method

This course is available using the following training methods:

Anytime learning
Hands-on lab
Virtual hands-on lab
Self-study guide

Duration

This course takes approximately 8 hours to complete.

Course outline

- Initial payroll preparation
- Income setup
- Deduction setup
- User-defined expense setup
- Employees
- Opening balances
- Paychecks
- Benefits
- Group benefits
- Reimbursements
- Advances and loans
- Payroll entitlements
- Commission
- Vacation Pay
- Payroll remittance
- PIER reporting
- T4, RL-1, and ROE forms
- Payroll maintenance
- PRPP and VRSP

Assessments

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book.
- You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 120 days from registration date, so remember to take the exam before it expires.

Level 3: Sage 50 Power User

Overview

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, and how to prepare and complete a year end.

Target learners

Customers who want to get a comprehensive understanding of their Sage 50 Accounting product.

Entrance requirements

Level 2: Sage 50 Accounting Module

Delivery method

This course is available using the following training methods:

Anytime learning
Hands-on lab
Virtual hands-on lab
Self-study guide

Duration

This course takes approximately 8 hours to complete.

Course outline

- Inventory
- Projects
- Foreign currency
- Reports and forms
- Year end
- Departments
- Time and billing
- Enhanced productivity features

Assessments

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book.
- You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 120 days from registration date, so remember to take the exam before it expires.

Level 4: Sage 50 Application Specialist

Overview

This course focuses on the advanced features of Sage 50 including advanced inventory, advanced projects, import and exporting, data management, company consolidation, and business intelligence.

Target learners

Customers who want to get a comprehensive understanding of the advanced features of their Sage 50 Accounting product.

Entrance requirements

Level 3: Power User

Delivery method

This course is available using the following training method:

Anytime learning

Duration

This course takes approximately 4 hours to complete.

Course outline

- Advanced inventory
- Intelligence reporting
- Advanced projects
- Import and export
- Data managements
- Company consolidation

Assessments

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book.
- You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 120 days from registration date, so remember to take the exam before it expires.

Level 5: Sage 50 Bridging

Overview

This course gets you up to speed on every new Sage 50 upgrade by walking you through every new feature, helping you save time and money.

Target learners

Customers wanting to get a better understanding of the new features and how to use them to their full potential.

Entrance requirements

Experience using a previous version of Sage 50

Delivery method

This course is available using the following training method:

Anytime learning

Duration

This course takes approximately 1 hour to complete.

Course outline

- All new features for the version of Sage 50 you are upgrading to.

Assessments

- This online assessment consists of multiple-choice, multiple-response, and true-false questions.
- The minimum acceptable score for this assessment is 80%.
- This assessment is open book.
- You may use your training manual, class notes, product documentation, or online help during the assessment.
- You receive 2 attempts per registration.
- This exam will expire 120 days from registration date, so remember to take the exam before it expires.

Getting started with Sage 50

Overview

This seminar-style course is for users who are new to Sage 50 accounting software. Attendees will learn about help resources and where to find them, additional Sage 50 products and services, and basic Sage 50 features.

Target learners

New users wanting to get started with Sage 50 without attending a full training course.

Entrance requirements

None

Delivery method

This course is available using the following training methods:

Seminar
Real-time learning

Duration

This course takes approximately 8 hours to complete.

Course outline

- Creating a new company using the Setup Wizard
- Navigating Sage 50
- Review historical balances
- Configuring sales taxes
- Setting up customers and service items, entering invoices, and receiving payments
- Setting up vendors, entering, and paying invoices
- Reviewing receivables and payables reports
- Filing HST/GST returns (or other applicable taxes)
- Tracking credit cards used in payables
- Setting up credit cards accepted in receivables and using Sage Payment Solutions
- Overview of bank reconciliation
- Configuring a backup

Assessments

- None

Maximize your business with Sage 50

Overview

This seminar-style course is designed for experienced Sage 50—Canadian Edition users, bookkeepers, and accountants who want to enhance their efficiency within a variety of product areas. Attendees will also learn about infrequently used features and tools.

Target learners

Users who want to get the most from Sage 50 without attending a full training course.

Entrance requirements

Getting started with Sage 50

Delivery method

This course is available using the following training methods:

Seminar
Real-time learning

Duration

This course takes approximately 8 hours to complete.

Course outline

- Determining when to use departments vs projects
- Setting up and using budgets for projects and departments
- Importing/exporting budgets
- Setting up and using time & billing, including tips and trick for internal tracking
- Exploring payroll expense groups, check runs, and remittances
- Clearing and merging records
- Updating employee tax credits and WCB rates
- Electronic filing of GST, T4, ROE, and T5018 government forms in Sage 50
- Discussing year-end processes
- Utilizing the forms designer
- Using the accountants copy of your data

Assessments

- None

Sign up for your course

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

1. Visit SageU.com/Sage50AccountingCanada/LearningCentre/

2. Below **New to Sage U?** click **Create your profile**.

3. Complete the form. Make sure you enter your account number.

4. Put your password in a safe place.

5. Select **Login**.

6. On Sage University home page, under **Sage 50 – Canadian Edition**, search for training by topic, delivery format, or calendar.

7. 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**.

Or call your training advisor directly for more information
at **877-223-1045** or email them **Sage50CaTraining@Sage.com**.