

A top-down view of a wooden desk. In the top right corner, a portion of a silver laptop is visible, showing keys like 'Q', 'W', 'E', 'A', 'S', 'D', 'Z', 'X', 'C', 'V', 'B', 'N', 'M', 'Fn', 'Control', 'Option', and 'Command'. Below the laptop, a pair of black-rimmed glasses lies horizontally. To the right of the glasses is a white ceramic coffee cup filled with dark coffee, with a yellow handle. In the top center, a small green succulent in a dark pot sits on the desk. The wood grain of the desk is prominent, running horizontally.

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Accounting

**Customer Learning Curriculum
US Edition**



Get Started 4

Bookkeeping Essentials, Get Up & Running In 5 Easy Steps,
Get It Right From Set Up

Accounting Day-To-Day 6

Day-To-Day Processing, Accounting Mobile App, Simple Inventory,
Accounting for Cash

Save Time & Get Paid Faster 8

Automate Your Banking, Get Paid Faster, Keep Compliant With Sales Tax

Get Insight & Make Decisions 10

Checking the Health of your Business, Sage Intelligence Reporting,
Make Business Decisions Through Reporting & Analysis


Get Certified 12

Integrated Applications - AutoEntry 13

Add a New Company: Sage Business Cloud Accounting – US Edition,
Company Settings, Company Contacts. Adding Users and User Permissions,
Integration Settings, Manage Lists, Uploading Documents into AutoEntry,
Purchase/Bills, Sales Invoices, Vendor Statements, Bank Statements,
Expense Reports, Payment Accounts, Purchase and Sales Folder Overview

Free Webinars 18

Where you see this symbol -  - click to return to this page.



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 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



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 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 login 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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Accounting



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 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.





Save Time & Get Paid faster

(Free of charge)

Sage Business Cloud contains features that allow you to quickly and easily process your transactions, freeing up valuable time for you to spend running your business, contributing to a healthy cash flow and giving piece of mind that you are compliant with tax legislation. The courses in this sections are:



Automate Your Banking



Get Paid Faster



Keep Compliant with Sales Tax

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!



Save Time & Get Paid Faster



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Accounting

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.

Keep Compliant with Sales Tax

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





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



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Accounting

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.

- Creating group and transaction analysis
- Allocating group analysis to customers and vendors
- Creating invoices with an analysis type
- Reviewing reports using analysis types





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 not 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](#) | >





Integrated Applications - AutoEntry

(Free of charge)

AutoEntry seamlessly integrates with your Sage solution to eliminate manual data entry by capturing your invoices, receipts, and statements automatically. There are many useful courses in this section grouped into the following sections:



Get Started



Set Up



Day-to-Day

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!!



Integrated Applications - AutoEntry



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Accounting



Get Started

Add a New Company Sage Business Cloud Accounting - US Edition

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



Setup

Company Settings

Learn how to review and modify the main company settings in AutoEntry.

Company Contacts

Learn how to configure vendors and customers in AutoEntry.

Adding Users and User Permissions

Learn how to add users and manage user permissions within AutoEntry.



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



Integrated Applications - AutoEntry



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



Setup (continued)

Integration Settings

This video describes the integration settings in AutoEntry to successfully communicate with your accounting solution

Manage Lists

This video describes how to review and configure categories, tax codes, expense categories, and mileage rates in AutoEntry



Day-to-Day

Uploading Documents into AutoEntry

Learn how to add documents into AutoEntry via email and your phone app; as well as scanning and uploading.

Purchase/Bills

This video discusses bills and their associated workflow.

Sales Invoices

This video discusses Sales Invoices and their associated workflow.





Integrated Applications - AutoEntry



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



Day-to-Day (continued)

Vendor Statements

This video discusses Vendor Statements and their associated workflow

Bank Statements

This video discusses Bank Statements and their associated workflow

Expense Reports

This video discusses Expense Reports and their associated workflow

Payment Accounts

This video describes how to add Payment Accounts and mark invoices as paid after completing the integration with your accounting software

Purchase and Sales Folder Overview

Learn how to upload, publish, reject and archive as well as track payment and mark them as paid or unpaid.





Free Live Webinars

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Accounting

Join a Sage expert on our FREE live webinars or access recordings of sessions designed for Bookkeepers and Accountants

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The logo for Sage, featuring the word "sage" in a bold, lowercase, sans-serif font. The letters are a vibrant yellow-green color. The 's' and 'a' are connected, as are the 'g' and 'e'. The background is a solid dark teal.

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