

## Sage Pastel Partner V14 Intermediate (Module 1 – Part 1)

### Course Overview

This comprehensive training course will give you the knowledge and skills necessary to perform a bookkeeper to trial balance function using Sage Pastel Partner Version 14.

### Target Learners

If you use Sage Pastel Partner Version 14 and want to improve your skills, or if you have a basic understanding of bookkeeping and want to learn how to apply this knowledge to a computerised system, this course is for you.

### Duration & Delivery Methods

This is a four day (24 hour) course. The delivery methods include self-study and facilitated workshops.

### Assessments

The assessment forms part of the course and has to be written within 6 months from the commencement date of your classroom training or self-study course. To make it easier for you, all the Sage Pastel assessments are ONLINE. This means that you can write the assessment in your own time and in the comfort of your own home (as long as you have a computer with internet access). Assessments are offered only in English.

How to register for your ONLINE assessment?

1. Visit the [www.sage.com/ZA](http://www.sage.com/ZA) website.
2. Select the Our Business Units option, followed by the Sage Pastel Accounting option.
3. Select the Business Zones link. On the new screen, select the Training Zone option.
4. If you have already created an online profile, log in with your user name and password.
5. If you do not have an online profile, click on the here link or the Create Personal Profile link to create your online profile.
6. Using the Serial Number that you received with your course material, select the Register Serial Number option. Enter the Serial Number and select the Register button.
7. Select the Write My Assessment option. On the next screen, select your registered assessment.
8. Select the Start Assessment button. Select the assessment link that displays in the new screen.
9. Read the assessment instructions and select the Let's begin button.

### Certification & Assessment Duration

The Sage Pastel Training Department will issue an Electronic Certificate of Competence to delegates who successfully achieve a minimum result of 75% for the assessment associated with this course. Please ensure that you have updated your details to ensure that the correct information is printed on your Sage Pastel certificate and that it is sent to the correct email address.

### Entrance Requirements

Learners need to meet the following prerequisites before attending this course:

1. Bookkeeping NQF Level 3 qualification or Standard 8/Grade 10 Bookkeeping.
2. Computer Literacy at NQF Level 3 or Standard 8/Grade 10 Computer Literacy.
3. Mathematical Literacy or Standard 8/Grade 10 Mathematics.

If a learner is not yet competent in the required prerequisites then he/she must first complete the relevant courses before enrolling for this course. Should we find a student on one of our courses that do not meet the prerequisites they will be asked to leave and the course fee will be forfeited.

Number of Questions:	88	Duration:	120 min	Accreditation:	12991 114736 243944
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## Course Outline

The course includes the following content:

### Installation

- Preparing to install
- Installing and registering Sage Pastel Partner Version 14

### Working in the Demo Company

- Open a company in Sage Pastel Partner Version 14
- Navigate in Sage Pastel Partner Version 14 using the four navigation methods

### Creating a New Company

- Setting up a company
- Using the Sage Pastel Partner Version 14 setup assistant

### Auto Setup

- Auto Setup menu

### Edit Masterfiles

- Edit General Ledger
- Edit Suppliers
- Edit Inventory
- Edit Customers

### Supplier Processing

- Create a purchase order
- Goods received notes
- Supplier invoices
- Return and debit
- Supplier journal

### Customer Processing

- Create a quotation
- Sales orders
- Tax invoices
- Credit notes
- Debit notes
- Customer journals

### Cash Book Processing

- Settings
- Processing in the cash book
- Inter-account transfers

### Monthly Processing

- Customer monthly processes
- Supplier monthly processes
- Other monthly processes
- Processing in cash book

### Take On Balances

- Taking on General Ledger balances
- Taking on Customer balances
- Taking on Supplier balances
- Taking on Inventory balances

## Booking process for South Africa, Lesotho and Swaziland

To book online please ensure that you have your ID number, Sage Pastel serial number and customer/pin number ready. If you are not currently a Sage Pastel user, all you need is your ID number.

### Step 1

Visit the [www.sage.com/ZA](http://www.sage.com/ZA) website. Select the [Our Business Units](#) option, followed by the [Sage Pastel Accounting](#) option. Select the [Business Zones](#) link. On the new screen, select the [Training Zone](#) option.

### Step 2

If you have a profile on the Training Zone, click on the [Login](#) link. If this is your first time booking, click on the [Create Personal Profile](#) link.

### Step 3

To book training, click on the [Training](#) menu, followed by the [Book Training](#) option. Click on the product that you want to be trained on.

### Step 4

Select the [Event Type](#) (Course you want to attend), the [Area](#) in which you would like to attend, and then select the [Event Dates](#). Click on the [Search](#) button. A list of possible dates and venues will display.

### Step 5

A brief overview of the course with confirmation of price, availability and the venue will then be shown. You may now elect to book or to go back and select another event or a different venue. Click on the [Book Training](#) button.

### Step 6

You are now required to enter your [personal details](#), including any food requirements you may have. On completion of this section you must submit your provisional booking by clicking on the [Complete Booking](#) button. A pro-forma invoice will be generated, giving you a unique TRA booking number.

### Step 7

You have 2 days in which to [make payment](#) for this course and to send the proof of payment to Sage Pastel. Email your proof of payment to [training@pastel.co.za](mailto:training@pastel.co.za). When sending through your proof of payment, please quote your [unique TRA booking number](#).

### Step 8

Once payment has been confirmed, you will receive your course confirmation and a map to the selected training event.

