

## Sage One Accounting Practitioner Course

### Course Overview

This comprehensive training course covers the setup and in-depth processing within the Sage One Accounting product.

### Target Learners

If you have a well-established accounting background and/or accounting qualification and want to learn how to manage your business in an online environment, this course is for you.

### Duration & Delivery Methods

This is a two day (12 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
4. Established Accounting background or qualification NQF Level 3.

If you are not yet competent in the required prerequisites, you must first complete the relevant courses before enrolling for this course. It is essential that the course prerequisites are met in order to avoid being asked to leave and the course fees being forfeited.

Number of Questions:

70

Duration:

90 min

Accreditation:

None

## Course Outline

### Day 1

#### Starting Sage One Accounting

- Sage One Accounting
- The online help and supporting documentation
- The sign up process for Sage One Accounting
- Logging into your company
- Navigating within Sage One Accounting

#### Maintain and administer your companies

- Maintaining your companies
- Creating users and assign permissions
- The overview of cycles in accounting
- Changing your password
- My profile

#### Create and maintain your supplier master files

- Supplier master files
- Creating your suppliers

#### Create and maintain your item master files

- Item master files
- Creating your items

#### Create and maintain your customer master files

- Customer master files
- Creating your customers

#### Processing supplier and customer documents

- The different transactions
- Process supplier transactions
- Process customer transactions
- Processing with analysis codes
- Receiving and making payments

#### Other Functionalities

- Quick views
- Generate reports
- Customer statement run
- The different reports in Sage One Accounting
- Favourites
- Losing your work

### Day 2

#### Maintaining your companies

- Maintaining your companies
- Setting up the company VAT periods
- Importing and exporting data

#### Suppliers, Items and Customers

- Maintain existing suppliers
- Adjust supplier opening balances
- Maintaining your items
- Item adjustments
- Maintain existing customers
- Adjust customer opening balances
- Creating your sales reps

#### Create and maintain other master files

- Other master files
- Creating your accounts
- Adjust accounts opening balances
- Sales and purchase accounts
- Account reporting groups
- Create your bank accounts
- Maintaining your bank and credit card accounts
- Adjusting bank and credit card opening balances
- Creating your assets
- Creating analysis codes

#### Processing and editing documents

- Processing with analysis codes
- Editing documents

#### Processing banks and credit cards

- Process banks and credit cards
- Reconcile banks and credit card transactions
- Import and map bank statements
- Automatic bank feeds
- Manage automatic bank feeds
- Budgets

#### The accountant's area

- The accountant's duties
- The accountant's area
- Processing journal entries
- VAT returns and reports
- Processing other VAT related transactions
- The accountant's reports

#### Other Functionalities

- The different reports in Sage One Accounting
- Compare reports to budgets
- The VAT 201 calculation report
- Opening 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.