Sage HandiSoft Learning Curriculum



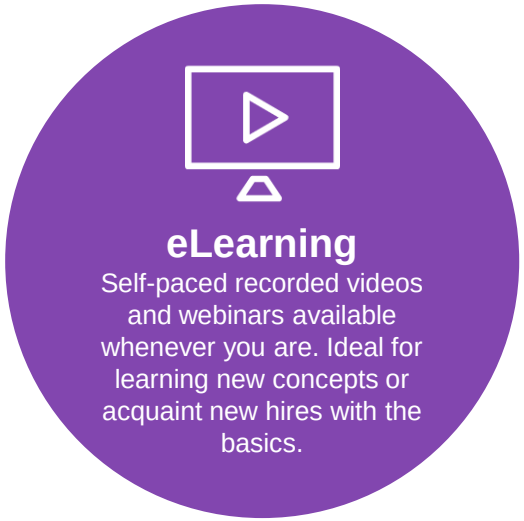
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Delivery Methods



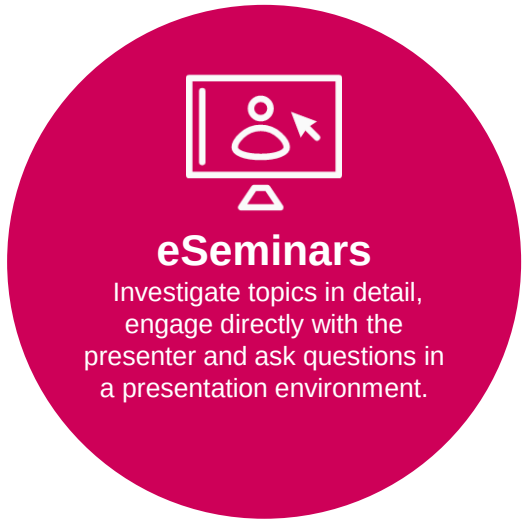
Private Training

Sessions are curriculum and training plans designed specifically for your organization delivered onsite or online.



eLearning

Self-paced recorded videos and webinars available whenever you are. Ideal for learning new concepts or acquaint new hires with the basics.



eSeminars

Investigate topics in detail, engage directly with the presenter and ask questions in a presentation environment.

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HandiSoft Courses

Whether you are a new HandiSoft user or an experienced user looking for training on what's new or advanced learning, there is an option to suit. With training options that are affordable and convenient, there are so many ways to learn.

HandiTax | HandiLedger | Practice Manager | Time+Billing | Document Manager | Client Portal | SuperFund | HandiRegister | HandiTrust | Tax and Productivity | Student Training

Training Options

HandiTax

- HandiTax Module 1 Private Training
- HandiTax Module 2 Private Training
- HandiTax Video Training

HandiLedger

- HandiLedger Module 1 Private Training
- HandiLedger Module 2 Private Training
- HandiLedger Video Training
- HandiLedger Tips and Tricks Webinar
- BankFeeds Video Training
- Workpapers Video Training
- Workpapers Webinar
- Flexible Report Writer

Practice Manager

- Practice Manager and Jobflow Manager Private Training
- Practice Manager Video Training
- Time+Billing and Jobflow Integration Video Training

Time+Billing

- Time+Billing Private Training
- Time+Billing Video Training
- Time+Billing Invoicing Webinar

Document Manager

- Document Manager Private Training
- Document Manager Video Training
- Systemising Your Accounting Practice with Document Manager Webinar

Client Portal

- Client Portal Webinar

SuperFund

- SuperFund Private Training
- SuperFund Video Training

HandiRegister

- HandiRegister Private Training
- HandiRegister Video Training

HandiTrust

- HandiTrust Video Training

Tax and Productivity eSeminar

- Tax and Productivity eSeminar

Student Training

- Student Training

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HandiSoft Purchasing Options

You can purchase our training courses in the following ways:

Training SuperBundle

Invest in the Training SuperBundle to gain access to our full library of resources. Materials include all training videos and recorded webinars, as well as business topical whitepapers and workbooks and 3 Tax legislation Updates during the year.

This comprehensive package allows you and your team to consume training across the whole HandiSoft suite as and when you need it.

This package is the best value for money.

Access period: unlimited access for your practice until the end of the current financial year.

Book

eLearning Courses

Purchase individual courses to learn the information you need, when you need it.

Courses may include one video or multiple videos in the series, depending on the topic. Total duration varies accordingly.

Access period: 12 months from date of purchase/ current Financial year.

Buy

Private Training Courses

For personal, hands on experience learning the HandiSoft suite, select a Private training course. This can be conducted in your office or online, depending on your location.

Training includes access to a training database for the course delivery period and an electronic manual for further reference.

Course duration can be tailored to suit you needs.

Book

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SuperBundle



This comprehensive package is packed with tips and tricks which will be useful to any new starter as well as long time users of the software.

Included contents:
eLearning Videos

- *HandiTax*
- *HandiLedger*
- *Practice Manager & Jobflow Manager*
- *Time+Billing*
- *Document Manager*
- *SuperFund*
- *HandiRegister*
- *HandiTrust*
- *Workpapers*

Pre-recorded Webinars

- *HandiLedger Tips & Tricks for the Accountant*
- *Flexible Report Writer*
- *Time+Billing – Invoicing*
- *Systemising your accounting practice using Document Manager*
- *Client Portal*

Whitepapers and workbooks

- *Brand UP! Building Brand Meaning in Your Firm*
- *Time Management and the Art of Prioritisation*
- *Customer Selection Criteria – Don't Pollute Your River*
- *Evaluating You Current Clients – Bad Clients Drive out Good Clients*
- *Firing Clients – Make Changes Toward Greater Profitability*
- *The Foundations of Value*

Other

- *3 Quarterly tax updates*
- *Software Release Tips and Tricks videos*

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Course Details

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HandiTax

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training, eLearning and eSeminar training on specific features and functionality.

HandiTax Module 1

This private training course covers basic features of HandiTax used to prepare and lodge taxation returns. We have aimed this training course at HandiTax operators who require a basic knowledge of the program. Preparation and lodgment of Individual taxation returns is emphasised.

Delivery Method

Online or at your premises

Duration

3 hours

HandiTax Module 2

This private training course will advance your basic knowledge of HandiTax to an intermediate level, where you will develop skills that will take you toward being a power user of HandiTax. You will use all the HandiTax features that enable you to prepare tax returns for all entity types.
We recommend completion of HandiTax Module 1 before taking this course.

Delivery Method

Online or at your premises

Duration

3 hours

HandiTax Video Training

This eLearning course includes over 30 training videos introducing you to the features of HandiTax.

Topics include:

- *Navigation*
- *Creating a return*
- *Data entry including Salary & wages, Capital Gains, rental statement, depreciation worksheet, PAYG and HECS, trust distributions*
- *ATO Pre-fill*
- *Correcting errors*
- *Lodging tax returns*
- *Reporting*

Duration

1.5 hours

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HandiLedger

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

HandiLedger Module 1

This private training course is for those who require a basic knowledge of HandiLedger. It emphasises ledger setup, data entry, and basic reporting. You will create a new client, and enter receipts, payments and journals.

You will also learn how to correct data, perform bank reconciliations and print basic financial statements.

Delivery Method
Online or at your premises
Duration
3 hours

HandiLedger Module 2

This private training course will develop your basic skills to an intermediate level. You will utilise all of the features of the program to enable you to cater for any entity type and produce complex reports for your clients.

This should be completed after HandiLedger Module 1 or with a good understanding of HandiLedger basics.

Delivery Method
Online or at your premises
Duration
3 hours

HandiLedger Video Training

This eLearning course includes over 25 training videos, each covering specific topics so you can learn the features and functions of HandiLedger.

Topics include:
- *Setting up entities*
- *Importing data & reconciling bank statements*
- *Bankfeeds*
- *Processing transactions*
- *Journals*
- *Suspense accounts*
- *Financial years*
- *Divisional accounting*
- *Reports*

Duration
1.5 hours

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HandiLedger

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

HandiLedger Tips and Tricks Webinar

This recorded webinar provides tips and tricks for accountants new to HandiLedger to get them started, including:

- *Adding a new entity*
- *Customising the chart of accounts*
- *Various data entry methods including BankLink*
- *Troubleshooting and data correcting options*
- *Using the Notes, Directors Details and Trustees' Declaration*
- *Different reporting options as well as the transfer function to HandiTax*
- *Adding documents to the entity in HandiLedger*

Duration

1 hour

Bankfeeds Video Training

This eLearning video contains an overview of the BankFeeds module, including:

- *Setting up a new account*
- *Setting up new authority forms*
- *Allocating an account code*
- *Set up a search term*
- *Split a transaction*
- *Tag and email lines to client*
- *Post transactions*
- *Maintenance of search terms*
- *Reports*

Duration

1 hour

Workpapers Video Training

This eLearning video will introduce you to the functionality of the Workpapers module.

Topics include:

- *Understanding the Workpapers screen*
- *Completing forms within Workpapers*
- *Attaching supporting documentation*
- *Removing unwanted forms from an entity*
- *Update the status of a Workpaper*
- *Finalise documents*
- *Set up a template*

Duration

1 hour

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HandiLedger

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

Workpapers and Templates

This recorded webinar demonstrates the functionality of HandiLedger Workpapers + Templates. We will look at setting up Workpapers, then completing the forms within Workpapers.

We will look at the workflow of data within the software, including the status of a form or supporting document and the cross-referencing of information.

Duration

1 hour

Flexible Report Writer

This recorded webinar introduces you to the Flexible Report Writer, which is the structured programming language that produces the reports that you see in HandiLedger.

Duration

1 hour

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Practice Manager

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

Practice Manager and Jobflow Manager

This private training course introduces you to the Practice Manager program, from navigation, setup and configuration to diary and reports. There is an emphasis on Contact and Event Management, Client Centric features and Jobflow Manager.

Delivery Method

Online or at your premises

Duration

3 hours

Practice Manager and Jobflow Manager Video Training

This eLearning course includes 9 training videos introducing you to the features of Practice Manager, along with 3 videos covering Jobflow Manager.

Topics include:

- *Set up*
- *Navigation*
- *Customisation*
- *Additional databases*
- *User diaries*
- *Daily group and leave planners*
- *Reporting*
- *Mail merging*
- *Resource allocation*
- *Imports*

Duration

2 hours

Time+Billing and Jobflow Integration

This webinar recording demonstrates how to set up budgets for a job in Jobflow Manager, then allocate time against the job in Time+Billing. It will cover the additional functionality in Time+Billing which allows the module to track time against a job.

Duration

1 hour

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Time+Billing

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

Time+Billing Private Training

This private training course takes you through the main functions and applications of the Time + Billing module.

You will learn about configuring the module, workflows, processing of invoices and receipts, managing budgets, customisation options, how to generate reports and more.

Delivery Method

Online or at your premises

Duration

3 hours

Time+Billing Invoicing Webinar

This webinar recording covers will introduce you to all the invoicing features of the Time+Billing module, including:

- *Setting credit card fees*
- *Creating invoices, using the new adjustment functionality*
- *Viewing and finalising a temporary invoice Invoicing a billing client*
- *Creating an interim invoice*
- *Creating a Fee Schedule*
- *Creating a No WIP invoice*
- *Process a receipt*
- *Viewing the debtors ledger*

Duration

1 hour

Time+Billing Video Training

Through 12 eLearning videos you will learn the concepts of activities, cost codes and standard paragraphs for the Time+Billing module.

Topics include:

- *Setup*
- *Configuration*
- *Entering and managing timesheet*
- *Entering disbursements, WIP adjustments and No WIP invoices*
- *WIP invoices*
- *Billing clients and interim invoices*
- *Receipting*
- *Invoices and letterheads*
- *Reporting*
- *Budgets*

Duration

2 hours

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Document Manager

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

Document Manager Private Training

This private training course introduces you to the functions within Document Manager, like setting up, scanning documents and mail mergers, as well as some additional and advanced features.

Delivery Method

Online or at your premises

Duration

2 hours

Document Video Training

Through 12 eLearning videos you will learn the fundamentals of Document Manager and develop skills that will lead you towards becoming confident with the basic functionality, with an additional video focused on advanced functionalities.

Topics include:

- *Setup*
- *Adding documents*
- *Mail merge*
- *Saving documents from other HandiSoft applications*
- *Scanning*
- *Searching and sharing documents*

Duration

1.5 hours

Systemising Your Accounting Practice Using Document Manager Webinar

This recorded Webinar will get you comfortably with the basic functions of Document manager so you can improve your Practice processes, including:

- *Using the HandiSoft Document Manager to store and maintain documents*
- *Creating and distributing mail merge documents*
- *Locating documents within Document Manager*

Duration

1 hour

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Client Portal

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

Client Portal Webinar

Client Portal allows users of Document Manager to grant clients online, any time access to upload and download documents, data files and reports. This recorded webinar shows how to enable and use Client Portal, along with the following topics:

- *Introduction to use of Client Portal*
- *Enabling a client to use Client Portal*
- *Sharing documents with clients*
- *Requesting and managing client signatures for a single document*
- *Client Portal reports*
- *Client use of the Portal Viewing and signing document*
- *Saving documents from the Client Portal*

Duration

1 hour

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SuperFund

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

SuperFund Private Training

This private training course covers everything from setting up Superannuation Funds, managing investments, rental property management, statements, accounting and GST through to managing data.

This course will give you a complete overview of the SuperFund module so that you're fully equipped to utilise all it's features.

Delivery Method

Online or at your premises

Duration

3 hours

SuperFund Video Training

This eLearning course includes 6 training videos introducing you to the features of SuperFund.

Topics include:

- *Setting up a Superannuation Fund*
- *Entering prior year opening balances*
- *Adding and managing investments in the Fund*
- *Data entry*
- *Bank statements, GST and Tax*
- *Closing the Fund*
- *Transferring data to HandiTax*

Duration

1.5 hours

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HandiRegister

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

HandiRegister Private Training

This private training course develops your HandiRegister skills, helping you become a confident user of the program.

The course covers topics such as establishing companies, change of company details (form 484), review of company statements, mending lodged documents (Form 492), preparation of minutes and resolutions and reporting.

Delivery Method

Online or at your premises

Duration

3 hours

HandiRegister Video Training

This eLearning course consists of 8 training videos, each covering specific topics so you can learn the basics of the HandiRegister module and use it confidently.

Topics included:

- *Navigation*
- *Setup*
- *Using Help*
- *Adding a new company via electronic download*
- *Manually adding a new company*
- *Managing Director and Individual records*
- *Changing addresses*
- *Managing Shares*
- *ASIC Forms including annual company statements, ASIC invoices and HandiRegister reports*
- *Minutes and resolutions*

Duration

1.5 hours

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HandiTrust

Welcome to our library of Sage HandiSoft learning opportunities. These courses are designed to build your skills with private training and eLearning training on specific features and functionality.

HandiTrust Video Training

This eLearning course consists of 7 videos introducing you to the functionalities of HandiTrust, including:

- *Bank accounts and balances*
- *Journals, receipts and payments*
- *EFT, ATO refunds, firm payments and client cards*
- *HandiTax assessment notice*
- *Front cover defaults*
- *ABA files*
- *Bank reconciliation*
- *Reports*
- *Letters*

Duration

1 hour

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Tax and Productivity eSeminar

Our most popular event for accountants and a critical component of optimising your compliance work for tax time.

Tax and Productivity eSeminar*

This annual eSeminar covers changes in tax legislation, along with the Sage HandiSoft enhancements built to support these changes. You will also discover productivity tips related to Sage HandiSoft modules.

**Live and recorded options available.*

Buy



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Student Training



Student Training

Students have free access to online training videos for each of the following software modules: HandiTax, HandiLedger and Document Manager.

There are a number of benefits to students:

- *Become more employable as thousands of practices use Sage HandiSoft.*
- *Free access to online training for selected software modules.*
- *Increase your knowledge and ability in using popular accounting practice software.*
- *Access to a training database to practice your skills in a live environment.*

Apply for Student Training

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Build your skills – contact Sage today

Thank you for exploring the Sage HandiSoft Learning Curriculum. We hope you found what you needed. For further information about any of our courses, please contact ***servicesales.au@sage.com*** *or call 1300 624 724.*

About Sage

Sage is the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs. Sage began as a small business in the U.K. 30 years ago, and over 13,000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners, and developers.

And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.

Sage—the market leader for integrated accounting, payroll, and payment systems, supporting the ambition of the world's entrepreneurs.

For more information, visit ***www.sage.com***

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