Knowledge, skills, confidence

We design software to help you make a success of your business. That means helping make sure you get the best you can from the tools on offer. That’s what Sage Training is all about – helping you make the most of your software so you can make the most of your business.

Why Sage Training?
Knowledge - use the full potential of your software to help you manage your business
Skills - learn what you need to do your job well
Confidence - stand out from the crowd and stay motivated
Prospects - prove what skills you have to offer for promotion or a new job

Something to suit everyone
Whether you prefer learning in a traditional classroom-based style or want to do things at your own pace, Sage Training offers something for everyone.

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What’s your learning style? Whether you prefer to concentrate it all in one go or take things more gradually, there’s a choice of Sage training to suit you.

Classroom Training
A great way to concentrate your learning in a short space of time. Get to grips with your software away from everyday distractions on our one or two-day courses at dedicated training centres throughout the UK.
• Your own pc to get hands-on with your software
• Expert tutors
• Small class sizes

Self Study Courses
Sage Workbooks
Learn how to get the most out of your software in your own time with read and try sessions.
• 180-day version of the software*
• Practice data for real hands-on experience

e-Learning - Flexible online courses
A flexible way to boost your skills. Train online whenever it suits you.
• Learn new software skills in as little as five hours
• Up to 12 weeks to complete your training

CD Rom - learn at your own pace
Great for taking things at your own pace. Learn at home or at work in your own time.
• Simulated version of your Sage software
• Available for bookkeeping, accounts and payroll year end

Customise your training
We can adapt any of our classroom-based courses so you can pick and choose sessions to focus on what you need for your business. Train several people at one time, in one place for one low price.

Study and save!
Get more for your money, with Sage Training Passports

The idea is simple: when you buy several training course days at once, we’ll give you a discount. The more days you buy, the more money you save.

Not only do Sage Training Passports save you cash, they’re also flexible, letting you:
• Mix and match courses - choose from classroom, self study and e-learning options
• Share with others - several people in your business can use it at the same time
• Spread the cost - with interest-free Direct Debit payments**

To find out more or to buy your Sage Training Passport today, call us on 0800 33 66 33 or visit www.sage.co.uk/buytraining

3 day Passport*
*Available for Sage Instant customers only £585 + VAT or just £195 per day (valid for 6 months)

5 day Passport
£980 + VAT or just £196 per day (valid for 6 months)

10 day Passport
£1680 + VAT or just £168 per day (valid for 12 months)

*This does not apply to Sage ACT! Self Study Courses.

**Available on finance or cash terms for business purposes only. Subject to status. Terms and conditions apply.
Sage 50 Accounts Training

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Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training
Sage 50 Accounts Getting Started

**Classroom Training**
1 Day Course £280 + VAT

**What do I learn?**
Get a firm understanding of the basic principles of Sage 50 Accounts, from navigation through to creating and amending various records, getting started with opening balances and controlling user access.

**By the end of this course you will:**
- Be familiar with the Sage 50 Accounts user interface
- Understand how to use password protection and how to restrict user access
- Understand basic configuration, financial year settings, and setting up tax codes
- Know how to create, amend and delete nominal accounts
- Know how to create bank, cash and credit card accounts
- Understand the role of the Chart of Accounts, and how to amend it
- Know how to create departments
- Know how to create, amend and delete customer and supplier accounts
- Be able to enter opening balances for nominal, customer and supplier accounts

**What’s next?**
Learn more about the core operations with Sage 50 Accounts Stage 1.

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Sage 50 Accounts Stage 1

**Classroom Training**
2 Day Course £550 + VAT

**What do I learn?**
This course, suitable for those with a basic understanding of Sage 50 Accounts, will help you understand its core operations. Some of the key topics include processing invoices, credit notes and payments, managing the sales ledger, posting bank payments and receipts, error correction and protecting your data.

**By the end of this course you will:**
- Know how to enter supplier invoices and credit notes
- Be able to post supplier payments including printing remittance advices, cheques and using e-banking
- Know how to create and print service invoices and credit notes for customers
- Be able to post customer receipts and understand how to manage the Sales Ledger, including disputing invoices
- Understand how to deal with contra entries
- Be familiar with posting bank and cash transactions
- Learn how to save time by using Recurring Entries
- Understand how to interrogate data using searches to enable more accurate reporting
- Know how to check and safeguard data using backups
- Understand how to correct errors
- Know how to post and correct Journal Entries
- Be able to process customer payments and supplier refunds

**What’s next?**
Take the next step with Sage 50 Accounts Stage 2. Prove your skills with Sage Certification.

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"Did it meet my needs? Absolutely. It was what I expected and more."

Tom Rae
HML Holdings plc
**Sage 50 Accounts Stage 2**

**Classroom Training**
2 Day Course £550 + VAT

**What do I learn?**
Take an in-depth look at the processes for Month End, Year End, credit control and VAT return. It also covers depreciation, prepayments and accruals and key performance indicators.

**By the end of this course you will:**
- Know how to perform a bank reconciliation
- Understand how to manage credit control, including reports, statements and overdue letters
- Be able to manage and forecast your cash flow
- Be able to write off bad debts and perform a VAT reclaim
- Know how to set up the Fixed Asset Register, post depreciation journals and dispose of fixed assets
- Understand how to post prepayments and accruals
- Be able to produce financial reports, including the Profit & Loss report and Balance Sheet
- Know how to set budget information and use departments for additional analysis
- Be able to produce, check and submit a VAT Return
- Know how to prepare for, and run the Year End routine
- Understand how to integrate Sage 50 Accounts with Microsoft Office

**What’s next?**
Take the final step with Sage 50 Accounts Stage 3. Prove your skills with Sage Certification.

**Sage 50 Accounts Stage 3**

**Classroom Training**
2 Day Course £550 + VAT

**What do I learn?**
Learn everything you need to know about managing a stock control system and processing sales and purchase orders. This course also covers sales invoices and credit notes, quotes and pro forma invoices, as well as foreign trading and Intrastat reports.

**By the end of this course you will:**
- Know how to plan and maintain stock records, post opening balances and record adjustments
- Know how to set up multiple delivery addresses for your company, your customers and suppliers
- Be familiar with the purchase order cycle, know how to process from entry to delivery and match posting invoices to orders
- Understand product pricing and discount structures
- Be familiar with the sales order cycle, know how to process from entry to despatch and link to other areas of Sage 50 Accounts Professional
- Know how to perform stock takes, process stock adjustments and deal with stock returns and stock month end journals
- Know how to use the Bill of Materials function to assemble finished goods from stock components
- Be able to produce product invoices and credit notes
- Be able to produce quotes and pro forma invoices
- Be able to produce repeat invoices using recurring transactions, skeletons and duplicates
- Know how to run a stock year end and make global changes
- Know how to produce foreign currency orders, create foreign currency price lists and generate Intrastat reports

**What’s next?**
Prove your skills with Sage Certification.
**Sage 50 Accounts Essentials**

**Classroom Training**
1 Day Course £280 + VAT

**What do I learn?**
Understand the basic functions of Sage 50 Accounts. Some of the key topics include bank transactions, setting up customers and suppliers, creating and paying invoices, useful reports and taking and restoring backups.

**By the end of this course you will:**
- Know how to navigate the program and the ledgers
- Understand how to use the bank for payments, receipts and transfers
- Be able to set up customers and suppliers, create invoices and credit notes, pay invoices and allocate credit notes
- Understand how to correct mistakes
- Be familiar with bank reconciliation
- Know where to find useful reports such as aged debtor, aged creditor, nominal activity, chart of accounts, profit and loss and balance sheet
- Be able to check your data, take a backup and restore from a backup

**Sage 50 Accounts Report Design**

**Classroom Training**
2 Day Course £550 + VAT

**What do I learn?**
Become an expert at amending and creating reports/layouts, adding totals, filters and also ranges for more specific analysis.

**By the end of this course you will:**
- Know how to create new reports using the report wizard, amend fixed reports, select variables, sort information and amend the page layout
- Be able to insert calculations into a report and change the presentation of information
- Know how to improve presentation by adding sub-totals and grand totals
- Understand how to add filters to a report to select specific information
- Be able to split debits and credits and produce meaningful transaction totals
- Be familiar with selection filters, advanced filters and advanced criteria
- Know how to create overdue account letters and sales promotions using specific criteria and expressions
- Know how to amend an existing invoice, letter or order layout

“Excellent. Exactly what I needed to know at a pace that was very manageable.”
Alicia McKenzie, Unicorn Theatre
**Linking Sage 50 Accounts to Microsoft® Office**

**Classroom Training**
1 Day Course £280 + VAT

What do I learn?
Learn everything you need to know about how Microsoft® Office can integrate with Sage 50 Accounts. It includes dynamically linking spreadsheets in Excel, running mail merges in Word and creating live links to PowerPoint presentations.

By the end of this course you will:
- Have had a basic introduction to the Open DataBase Connectivity (ODBC) driver
- Be able to navigate around the menu options available in Microsoft® Query
- Know how to update the live link between the query and Sage 50 Accounts using the refresh option
- Understand how to add both single and multiple calculations to a query, then return the data to Microsoft® Excel and format the cells
- Be able to run a mail merge within Microsoft® Word to link the data in Sage 50 Accounts to a Word document
- Know how to create labelled envelopes from the names and addresses in Sage 50 Accounts
- Understand how to use the If…Then…Else statement within Microsoft® Word
- Be able to use multiple tables within Microsoft® Excel and join the tables together
- Know how to use the cycle through totals option in Microsoft® Query
- Be able to create graphs in Microsoft® Excel based on data from Sage 50 Accounts and create a live link to Microsoft® PowerPoint
- Know how to create pivot tables and charts in Microsoft® Excel to dynamically interrogate the Sage 50 Accounts data
- Know how to add criteria to select specific data from Sage 50 Accounts
- Be able to set up parameter queries to enable specific ranges to be entered when requesting data from Sage 50 Accounts

*Sage 50 Accounts Project Costing**

**Classroom Training**
1 Day Course £280 + VAT

What do I learn?
Take a comprehensive look at the project lifecycle including costs, budgeting, resources, charges and billing.

By the end of this course you will:
- Be familiar with Project Costing and understand how to configure the module
- Be able to set up Cost Types and Cost Codes
- Know how to create and enter Project Records and Sub-Projects
- Understand how to assign invoices and bank payments to projects
- Be able to record committed costs
- Understand the concept and use of resources, project charges and credits
- Be familiar with project reporting, activity and on screen enquiries
- Understand Billing and Project closure

*“This course satisfied my training requirements and gave me an appetite to sign up for another one.”*
Stuart Bratchell
Audio Visual Unit Ltd

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
Sage 50 Accounts Stage 1

Self Study Course
4 Workbooks £150

What do I learn?
This course enables you to get setup and running with your Sage 50 Accounts software. You will cover the installation and the setup of your business accounts. You will also learn how to enter day-to-day transactions, make corrections and perform housekeeping tasks.

By the end of this course you will:
- Understand the installation procedure for Sage 50 Accounts and navigate around your software
- Know how to deal with the setup of your company information as well as your nominal, bank, customer and supplier accounts
- Be aware of your chart of accounts and how to tailor this to help you extract information that is relevant to your business
- Become familiar with how to enter your customer, supplier and nominal opening balances for your business
- Know how to enter day-to-day transactions with confidence, including journals, bank, cash and credit card transactions as well as customer and supplier invoices and payments and using Sage Pay
- Understand how to use corrections to make changes to your transactions and also use the diary options
- Apply housekeeping routines, such as backup and restore
- Know how to setup users, assign access rights and change passwords
- Become proficient to sit your Sage 50 Accounts Level 1 Certification exam with confidence

What’s next?
Build on your existing knowledge of Sage 50 Accounts by learning the Stage 2 and Stage 3 Self study course and Sage Certification.

Sage 50 Accounts Stage 2

Self Study Course
4 Workbooks £150

What do I learn?
This course helps you get the most out of Sage 50 Accounts. You will become familiar with the more advanced features, including the bank reconciliation, VAT Return and year end. You will also learn about the management reports and how to extract information to other software.

By the end of this course you will:
- Become familiar with the search facilities, to display the information you need, and how to use your software to help you manage your business credit control
- Learn how to process period end procedures, including recurring entries, reconciling the bank, posting fixed asset depreciation, processing prepayments and accruals
- Understand the financial reports available and tailor the chart of accounts to suit your business
- Be confident to complete the VAT return, run the year end, set up and use budgeting, operate the cash flow planner and dashboards
- Know how to produce graphs, export your data, deal with multi company accounts and consolidation
- Become proficient to sit your Sage 50 Accounts Level 2 Certification exam with confidence

What’s next?
Build on your existing knowledge of Sage 50 Accounts by learning the Stage 3 Self study course and Sage Certification.

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
**Sage 50 Accounts Stage 3**

**Self Study Course**

4 Workbooks £150

What do I learn?

This course helps you plan and operate a stock control system that works for your business. You will practise with the options available to help you control your stock, produce sales and purchase orders and invoices. You will also learn about project costing.

By the end of this course you will:

- Become familiar with how to plan a stock system that works for your business
- Understand the cost of sales, how to create product records and how to enter product opening balances
- Learn how to create quotations and pro-forma invoices
- Know how to generate and process purchase orders, sales orders and deal with cash sales
- Become aware of the pricing and discount structures available
- Know how to setup and assemble a bill of materials
- Learn how to perform a stock take, run the stock period end and stock year end
- Become familiar with posting recurring transactions, using global changes and dealing with foreign trade and the Intrastat
- Become proficient to sit your Sage 50 Accounts Level 3 Certification exam with confidence

What’s next?

Maximise on your experience of Sage 50 Accounts by attending a classroom course on the Sage 50 Accounts Report Design (see page 13), Linking Sage 50 Accounts to Microsoft® Office (see page 14) or Microsoft® Excel Stages 1 & 2 (see page 46/47).

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**Sage 50 Accounts Stage 1**

**e-Learning 6hrs Course**

12wk licence £100 + VAT
CD Rom £65 + VAT

What do I learn?

This course covers essential functionality to help you make best use of Sage 50 Accounts. You will learn how to setup your company details, create your nominal ledger, your customers and suppliers. You will also practise entering opening balances, posting transactions, using corrections and reconciling the bank.

By the end of this course you will:

- Understand the installation procedure for Sage 50 Accounts and navigate comfortably around your software
- Know how to deal with the setup of company information as well as your nominal, bank, customer and supplier accounts
- Be aware of your chart of accounts and how to tailor this area to help you extract information that is relevant to your business
- Become familiar with how to enter your customer, supplier and your business nominal opening balances
- Know how to enter day-to-day transactions, including bank, cash and credit card transactions as well as customer and supplier invoices and payments
- Understand how to make changes to your transactions using corrections
- Learn how to reconcile your bank transactions with your bank statement
- Apply housekeeping routines, such as backup and restore
- Gauge your understanding of the topics you learned by taking the session quizzes and the final course test

What’s next?

Expand your knowledge of Sage 50 Accounts by learning the Sage 50 Accounts Stage 2 courses. These are available as a Self study course (workbooks), or via classroom training.

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
## Sage 50 Payroll Training

### Classroom Training
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### Self Study Courses
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### e-Learning
- Sage 50 Payroll Year End: Page 28

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**Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training**
**Sage 50 Payroll Stage 1**

**Classroom Training**
2 Day Course £550.00 + VAT

**What do I learn?**
Get to grips with the basic principles of setting up and processing payments in Sage 50 Payroll. From setting up your employees and users in the software, to processing weekly and monthly payroll runs, dealing with pensions, starters and leavers, as well as getting to grips with month end routines.

**By the end of this course you will:**
- Understand how to configure the program to suit company requirements
- Learn how to use password protection and how to restrict user access
- Be able to create pay elements for payments, deductions and net payments and understand the pay element reports
- Understand the methods of creating, editing and customising employee records
- Be able to run a basic weekly/monthly payroll run including emailing payslips to your employees
- Know how to set up pension schemes to deduct pension contributions from the employee and calculate any employer contributions
- Understand how to make changes using the rollback function
- Know how to set up new starters with and without P45 details
- Be able to create holiday schemes and use the absence diary to record the details
- Learn about processing holiday pay in advance to employees
- Understand how to use the monthly P32 form to calculate amounts due to HMRC

**What’s next?**
Tackle the more complex areas of your software with Sage 50 Payroll Stage 2. Prove your skills with Sage Certification (See page 56).

---

**Sage 50 Payroll Stage 2**

**Classroom Training**
1 Day Course £280 + VAT

**What do I learn?**
Deals with handling the more advanced operations in Sage 50 Payroll, including processing attachments and statutory payments, using electronic banking and submissions and transferring journals across to your accounting software.

**By the end of this course you will:**
- Be able to process statutory payments and calculate employee entitlement
- Understand how to allocate and process attachments of earnings
- Know how to set up the link between Sage 50 Payroll and Sage 50 Accounts and how to transfer the data
- Process electronic payments to your employees and HMRC and submit electronic documents directly from Sage 50 Payroll

**What’s next?**
Prove your skills with Sage Certification (See page 56).

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**Other options available**

Find out more. Call **0800 33 66 33** or visit [www.sage.co.uk/training](http://www.sage.co.uk/training)

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“I found the course very informative and well presented. I was very satisfied with the training.”

Sinead McEwen
Urban Initiatives
**Sage 50 Payroll Report Design**

**Classroom Training**
1 Day Course £280 + VAT

**What do I learn?**
This course explains everything you need to know about amending and creating reports/layouts, adding totals, filters and ranges for more specific analysis.

**By the end of this course you will:**
- Be able to create new reports and amend standard reports and page layouts
- Know how to insert expressions into a report to calculate and print specified information
- Know how to insert groups into existing reports to subsection information and create subtotals
- Understand how to add filters to select specific information in the report
- Understand how to print criteria on reports
- Know how to use the report designer to create various employee letters

**Other options available**
Private and Onsite Training

**“I was very pleased with the quality of the training, through good teaching and manuals I found it very easy to pick up how to use the software.”**
Annabel Narney
Angel Finance & Property Services

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**Sage 50 Payroll Year End Workshop**

**Classroom Training**
Half Day Course (Between Feb–Apr) £195 + VAT*

**What do I learn?**
Get the skills and knowledge you need to complete your Payroll Year End using Sage 50 Payroll. Includes how to identify and overcome common issues, Year End Processing and Returns, Internet Submissions and preparing for the new tax year.

**By the end of this course you will:**
- Understand the preliminary tasks that make Payroll Year End run smoothly
- Know how to identify and correct errors prior to Payroll Year End processing
- Understand the Payroll Year End procedure and how to ensure all appropriate checks are completed
- Understand the different statutory forms and when they need to be submitted
- Know how to submit P14 and P35 forms electronically to HMRC
- Know how to get ready and process your payroll in the new tax year

**Other options available**
e-Learning
Private and Onsite Training

**“The training I received will be priceless in my workplace.”**
Diane Craig, Ian Craig (Haulage) Ltd

*Available am/pm
When booked using a Sage Training Passport 1 day will be deducted from the remaining days on your passport.
Sage 50 Payroll Stage 1
Self Study Course
3 Workbooks £100

What do I learn?
This course enables you to get setup and running with Sage 50 Payroll. You will process the payroll and view the calculation of tax and national insurance. You will also produce reports and payslips, deal with starters and leavers, pensions, loans and holidays.

By the end of this course you will:
• Understand the installation procedure for Sage 50 Payroll and navigate around your software
• Know how to setup payroll users, assign access rights and change passwords
• Understand where to check the legislation settings, how to set up your company information and create payment and deduction types for your employees
• Learn how to create employee and personnel records, how to use global changes and enter the employee year to date values
• Become familiar with how to process your weekly or monthly payroll, understand the calculations behind the scenes and use tools such as reset payments and time sheet entry
• Learn how to deal with starters and leavers
• Make best use of the housekeeping routines, such as backup, rollback and restore
• Learn how to perform a pay review and view variance reports
• Know how to advance holiday pay, how to apply holidays and absences and operate holiday funds
• Understand how to setup and process pension schemes and company loans
• Become proficient to sit your Sage 50 Payroll Level 1 Certification exam with confidence

What’s next?
Build on your existing knowledge of Sage 50 Payroll by learning the Stage 2 Self study course and Sage Certification.

Sage 50 Payroll Stage 2
Self Study Course
3 Workbooks £100

What do I learn?
This course broadens your experience of Sage 50 Payroll. You will concentrate on statutory elements that you will need to deal with in your business, learn how to process the payroll year end and import and export your payroll data.

By the end of this course you will:
• Learn how to link your data in Sage 50 Payroll with your version of Sage Accounts
• Understand how to export payroll data to files, how to import data into Sage 50 Payroll, how to integrate your data with Microsoft® applications and how to use payroll reminders
• Become confident with the setup and processing of attachments of earnings orders and student loan deductions
• Understand how to deal with and process statutory sick pay, statutory maternity pay, statutory paternity pay and statutory adoption pay
• Know how to process the payroll month end, the payroll year end, e-Submissions and how to use e-Banking
• Become familiar with processing into the new tax year, dealing with historical data, the audit trail and HMRC inspection reports
• Become proficient to sit your Sage 50 Payroll Level 2 Certification exam with confidence

What’s next?
Maximise on your experience of Sage 50 Payroll by attending a classroom course on the Sage 50 Payroll Report Design (see page 24).
Sage 50 Payroll Year End
e-Learning 6hrs Course
12wk licence £55 + VAT

What do I learn?
This course helps you run a successful and trouble-free payroll year end. You will learn what to prepare before running the year end, how to set up your internet submissions, process the payroll year end and prepare for your new tax year.

By the end of this course you will:
• Understand the reasons for running your payroll year end and learn the key dates involved
• Know what tasks you need to complete before you process your year end
• Become familiar with the procedures for registering with HMRC and for sending your year end returns online to HMRC
• Know how to perform your year end in Sage 50 Payroll
• Learn what you need for your new payroll tax year
• Know who to contact should you require further help with your payroll year end.
• Gauge your understanding of the topics you learned by taking the session quizzes and the final course test

What’s next?
Expand your knowledge of Sage 50 Payroll by learning the Sage 50 Payroll Stage 1 and Stage 2 courses. These are available as Self study courses (workbooks), or via classroom training.

*Note: This course is only available as an e-learning option

Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training
Sage ACT! Training

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Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training
Sage ACT! Users Course

**Classroom Training**
2 Day Course £550 + VAT

What do I learn?
This is an introductory course that will help you understand and get the best out of Sage ACT! It includes setting up contacts, lookups and searches, activities and opportunities, email, letter templates and how to mail merge.

By the end of this course you will:
- Be more familiar with navigation and what Sage ACT! can do for you
- Understand how to manage your contacts
- Know how to use Lookups and Searches
- Know how to use the Document tab, including editing, adding and mapping to spreadsheets
- Know more about Groups and Companies and how to use subgroups and divisions
- Understand how to schedule activities, including creating types and priorities, adding resources, contacts and users and how to use activity reporting
- Understand the Opportunity process and how to manage opportunities from creation to closing, including reports and pipeline management
- Be able to create letters, letter templates and understand how to use mail merge
- Understand how to use email integration
- Overview of database synchronisation

What’s next?
The Sage ACT! Administrators Course contains topics and information required by anyone who will be responsible for database administration.

Other options available
- Self Study
- Private and Onsite Training

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Sage ACT! Administrators Course

**Classroom Training**
2 Day Course £550 + VAT

What do I learn?
This is a more advanced course to help you maximise your knowledge and use of Sage ACT! It will help you master everything you need to know about creating a new database and users, customising fields and layouts.

By the end of this course you will:
- Know how to create a new database, create and delete users and manage user passwords
- Understand how to customise database fields, including modifying existing fields or setting up new ones, creating drop down lists and using field security
- Know how to use the Layout Designer to amend existing layouts and create new tabs
- Be able to customise menus, toolbars and the Navbar, including adding/removing icons and menu items
- Understand how to customise Smart Tasks
- Become familiar with and customise ACT! Dashboards.
- Know how to setup and use the Sage Accounting Integration, including importing and creating Sage Accounts records
- Understand how to Import Sage Accounts products into ACT! and converting opportunities to sales orders/invoices
- Be able to export from one ACT Database to another ACT Database
- Know how to deal with duplicate records and make global changes
- Understand how to use Database Maintenance including taking a backup
- Be able to import and export data from Microsoft® Excel

Other options available
- Self Study
- Private and Onsite Training
Sage ACT! User Course

What do I learn?
This course enables you to get setup and running with Sage ACT! You will learn how to add your contacts, perform lookups and searches and organise data into groups and companies. You will also practise with mail merges, activities, opportunities and email integration.

By the end of this course you will:
- Understand the installation procedure for Sage ACT! and navigate comfortably around your software
- Know how to manage your contacts, perform lookups and advanced searches
- Become familiar with adding notes and history and using the documents tab
- Learn about groups and companies and how to use subgroups and divisions
- Understand how to schedule activities, including creating types and priorities, adding resources, contacts and users and how to use activity reporting
- Know how to create letters, letter templates and understand how to use mail merge
- Understand the opportunity process and how to manage opportunities from creation to closing
- Be aware on how to use email integration and email merge
- Gain a good understanding of Outlook synchronisation
- Become proficient to sit your Sage ACT! Users Certification exam with confidence

What’s next?
Build on your existing knowledge of Sage ACT! by learning the Sage ACT! Administrators Self study course and Sage Certification.

Sage ACT! Administrators Course

What do I learn?
This course helps you maximise on your knowledge of Sage ACT! You will learn how to maintain databases and import and export data. You will also practise with customising your software, smart tasks, the accounting integration, searching for duplicates and applying global changes.

By the end of this course you will:
- Know how to create a new database, create and delete users and manage user passwords
- Understand how to customise database fields, including modifying existing fields or setting up new ones, creating drop down lists and using field security
- Be aware of the layout designer to amend existing layouts and create new tabs
- Be able to customise menus, toolbars and the Navbar, including adding/removing icons and menu items
- Understand how to customise Smart tasks
- Become familiar with and customise ACT! dashboards
- Know how to set up and use the Sage Accounting Integration, including importing and creating Sage Accounts records
- Understand how to import products from Sage Accounts into ACT! and convert opportunities to sales orders and invoices
- Be aware how to export from one ACT! database to another ACT! database
- Know how to deal with duplicate records and make global changes
- Understand how to use database maintenance including taking a backup

What’s next?
Maximise on your experience of using Microsoft® Excel by attending the classroom based courses (see page 46/47).
Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training
Sage Instant Accounts Stage 1

Classroom Training
1 Day Course £230 + VAT

What do I learn?
Understand the basic functions of Sage Instant Accounts, from navigation, through to creating and amending various records, getting started with opening balances and controlling user access.

By the end of this course you will:
• Be familiar with the Sage Instant Accounts user interface, settings & defaults.
• Know how to set up the program to suit your business, including VAT codes, financial year etc
• Be able to plan and customise the nominal ledger
• Know how to create bank accounts
• Understand the role of the chart of accounts, and how to amend it
• Be able to create and amend customer and supplier accounts
• Know how to enter opening balances for nominal, customer and supplier accounts
• Understand how to use password protection and how to restrict user access
• Know how to check and safeguard data using backups

What’s next?
Take the next step with Sage Instant Accounts Stage 2.
Prove your skills with Sage Certification (See page 56).

Sage Instant Accounts Stage 2

Classroom Training
1 Day Course £230 + VAT

What do I learn?
Increase your understanding of core operations, including Journal entries, Bank transactions, Sales and Purchase ledger, Invoicing and Products.

By the end of this course you will:
• Know how to record bank payments, bank receipts and transfers between bank accounts
• Be able to record supplier invoices and credit notes, and make supplier payments (including online)
• Understand how to record sales invoices and credit notes and post customer receipts
• Know how to print quotations, invoices and credit notes from the program
• Be able to record journal entries in the nominal ledger
• Understand how to identify and correct errors
• Be able to plan and create stock records and enter opening balances
• Know how to produce product invoices and manage stock control
• Learn how to save time by using recurring entries

What’s next?
Take the final step with Sage Instant Accounts Stage 3.
Prove your skills with Sage Certification (See page 56).

“The course was great and I felt it met my needs.”
Michael Baty
Robson Laidler

“The course met my needs as I knew very little beforehand.”
Nikki Linton
The Surrey Cardiovascular Clinic

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
Sage Instant Accounts Stage 3

**Classroom Training**
1 Day Course £230 + VAT

**What do I learn?**
Get to know the in-depth processes for Month End, Year End, credit control, VAT Return and Microsoft® Office integration. It also covers bank reconciliation, recurring entries and Dashboards (Sage Instant Accounts Plus).

**By the end of this course you will:**
- Know how to perform a bank reconciliation
- Be able to manage credit control, including statements and overdue letters
- Understand how to produce financial reports, including the Profit & Loss report and Balance Sheet
- Learn how to complete a VAT return and make VAT payments (including online)
- Know how to prepare for, and run the Year End routine
- Become familiar with how Microsoft® Office is used with Sage Instant Accounts

**What’s next?**
Prove your skills with Sage Certification (See page 56).

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**Sage Instant Accounts Self Study Course**
6 Workbooks £100

**What do I learn?**
This course covers all essential aspects of using Sage Instant Accounts, from setting up your accounts system, through to using your software on a day-to-day basis.

**By the end of this course you will:**
- Understand the installation procedure for Sage Instant Accounts and navigate comfortably around your software
- Know how to deal with the setup of your company information as well as your nominal, bank, customer and supplier accounts
- Be aware of your chart of accounts and how to tailor this to help you extract information that is relevant to your business
- Become familiar with the entry of customer, supplier and nominal opening balances for your business
- Know how to enter day-to-day transactions with confidence, including journals, bank, cash and credit card transactions as well as customer and supplier invoices and payments and using Sage Pay
- Understand how to use corrections to make changes to your transactions and how to apply the diary options
- Make best use of the housekeeping routines, such as backup and restore
- Know how to setup users and change passwords
- Learn how to setup your products, generate quotations, product-based invoices and credit notes
- Learn how to use your software to help you manage your business credit control
- Learn how to process typical month end procedures, including how to reconcile the bank, process recurring entries and deal with bad debt write off
- Become confident to complete the VAT return and run a successful year end
- Understand the financial reports, how to produce graphs and export your data.

**What’s next?**
Maximise on your experience of using Microsoft® Excel by attending the classroom based courses (see page 46/47).
### Sage Instant Payroll

#### Self Study Course

5 Workbooks £55

**What do I learn?**
This course helps you get setup and running with Sage Instant Payroll. You will process the payroll and view the calculation of tax and national insurance. You will produce reports and payslips, deal with statutory payments and the year end. You can take the free online tests provided.

**By the end of this course you will:**
- Understand the installation procedure for Sage Instant Payroll and navigate comfortably around your software
- Know how to setup payroll users and change passwords
- Understand where to check the legislation settings and how to set up your company details
- Learn how to create employee records and how to enter their year to date values
- Be confident to process a weekly or monthly payroll, understand the calculations behind the scenes and link payroll information to Sage Accounts
- Learn how to deal with starters and leavers
- Make best use of the housekeeping routines, such as backup, recover and restore
- Know how to advance holiday pay and how to record holidays and absences
- Understand how to process pensions, attachments of earnings orders and student loan deductions
- Understand how to deal with and process statutory sick pay, statutory maternity pay, statutory paternity pay and statutory adoption pay
- Know how to process the payroll month end, the payroll year end, e-Submissions and how to use e-Banking

**What’s next?**
This course provides you with a comprehensive learning tool to fully understand and operate your Sage Instant Payroll software. Maximise on your experience of using Microsoft® Excel by attending the classroom based courses (see page 46/47).

### Sage Instant Accounts

#### e-Learning 8hrs Course

12wk licence £55 + VAT
CD Rom £45 + VAT

**What do I learn?**
This course covers the essential aspects of using Sage Instant Accounts, from setting up your accounts system, through to using your software on a day-to-day basis. You will learn how to maintain accurate information to help you control your business finances.

**By the end of this course you will:**
- Understand the installation procedure for Sage Instant Accounts and navigate comfortably around your software
- Know how to deal with the setup of your company information as well as your nominal, bank, customer and supplier accounts
- Be aware of your chart of accounts and how to tailor this area to help you extract information that is relevant to your business
- Become familiar with how to enter your customer, supplier and your business nominal opening balances
- Know how to enter day-to-day transactions, including bank, cash and credit card transactions as well as customer and supplier invoices and payments
- Learn how to plan and create your products information and generate product-based invoices for your customers
- Make best use of the housekeeping routines, such as backup and restore
- Review the credit control settings in your software and how best to apply these to help you chase your debts and maximise on cash flow
- Learn how to process typical month end procedures, including how to produce letters and statements for your customers, how to apply late payment charges, process recurring entries and how to reconcile the bank
- Understand how to make changes to your transactions using corrections
- Understand the financial reports and practise how to complete the VAT return and run a successful year end
- Gauge your understanding of the topics you learned by taking the session quizzes and the final course test

**What’s next?**
This course provides you with a comprehensive learning tool to fully understand and operate your Sage Instant Accounts software. Maximise on your experience of using Microsoft® Excel by attending the classroom based courses (see page 46/47).
Sage Other Training

Classroom Training
Microsoft® Excel 2007 Stage 1  Page 46
Microsoft® Excel 2007 Stage 2  Page 47
Sage 50 Forecasting  Page 48
Sage WinForecast Professional  Page 49
Sage 50 Job Costing  Page 50

e-Learning and CD Rom
Sage Bookkeeping Stage 1  Page 51
Sage Bookkeeping Stage 2  Page 52

Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training
Microsoft® Excel 2007 Stage 1

Classroom Training
1 Day Course £280 + VAT

What do I learn?
It will give you the skills to work more confidently and efficiently with Microsoft® Excel 2007, from data entry and worksheet manipulation to working with formulas and creating charts to analyse your data.

By the end of this course you will:
- Know quick methods of navigation and data entry
- Be able to use the fill handle and create custom lists
- Learn how to use the table management feature to quickly sort and filter data
- Know how to simultaneously create, format and link multiple worksheets within the workbook
- Find out how to attach notes to a spreadsheet using the comments feature
- Understand how to construct and display formulae including logical functions
- Understand how to open and navigate multiple files and dynamically link them to produce a consolidation workbook
- Be able to use the chart wizard to represent your data graphically in your spreadsheet
- Be familiar with applying page breaks and other print settings

What’s next?
Take the next step towards mastering Excel with Microsoft® Excel 2007 - Stage 2.

Microsoft® Excel 2007 Stage 2

Classroom Training
1 Day Course £280 + VAT

What do I learn?
It will give you the skills to work confidently with more complex features in Microsoft® Excel 2007. From advanced formulae and analysing large quantities of data with pivot tables, to creating templates and using macros.

By the end of this course you will:
- Know how to create and edit named ranges
- Be able to use advanced formulae, such as SUMIF, VLOOKUP and INDEX, as well as nest different functions together
- Learn about data validation and conditional formatting
- Know how to spot errors in your workbooks using the auditing tool
- Be able to create pivot tables from raw data and then edit and reformat
- Learn about protecting your work and share your files with colleagues
- Know how to automate tasks to ensure accuracy and save time using macros

Other options available
Private and Onsite Training
Sage 50 Forecasting

Classroom Training
2 Day Course £550 + VAT

What do I learn?
This course explains everything you need to know about using Sage 50 Forecasting, from how to create forecasts, entering data, generating reports to integration with Sage 50 Accounts and Microsoft® Excel.

By the end of this course you will:
- Know how to create weekly or monthly forecasts using sections and sub-sections
- Be able to enter forecast information for sales and cost records using various calculation methods
- Understand ‘hot-linking’ from other Sage software and Microsoft® Excel
- Know how to forecast using standard and composite stock records, including stock channels
- Know how to forecast for fixed and financed fixed assets and how to handle revaluation of assets
- Understand external elements that affect forecasts, such as VAT rates, taxation and bank interest
- Know how to configure the bank account, business tax and dividends
- Be able to enter actual figures into forecasts and create variance reports

Sage WinForecast Professional

Classroom Training
2 Day Course £550 + VAT

What do I learn?
Discover the features of Sage WinForecast Professional that allow you to create forecasts, enter data, generate reports, integrate with Sage 50 Accounts and Microsoft® Excel and create consolidated forecasts.

By the end of this course you will:
- Know how to pre-set certain default information to save time when forecasting
- Know how to create new forecasts using the various types of records available
- Understand ‘hot-linking’ from Sage accounts software and Microsoft® Excel
- How to flex data in a forecast and to extend the forecast to cover a longer time period
- Know how to configure the bank account, business tax and dividends
- Understand external elements that affect forecasts, such as VAT rates, taxation and bank interest
- Be able to enter or import actual figures into forecasts and create variance reports
- Know how to configure the software for multi-currency
- Be able to customise reports, add formulae and create departmental forecasts
- Be able to handle domestic purchases and export sales of stock
- Know how to forecast for fixed and financed fixed assets and how to handle revaluation of assets
- Understand how to use the employee list to forecast wages
- Know how to consolidate forecasts and handle goodwill, minority interests and elimination
- Know how to create templates and maximise the use of memo records

Other options available

Private and Onsite Training

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
Sage 50 Job Costing

Classroom Training
2 Day Course £550 + VAT

What do I learn?
Find out everything you need to know to set up job analysis, including costs and profitability, assigning stock and invoices and how the data integrates with Sage 50 Accounts and Sage 50 Payroll.

By the end of this course you will:
- Be able to navigate the Sage 50 Job Costing menu and set up passwords and users for security
- Understand the integration between Sage 50 Job Costing, Sage 50 Accounts and Sage 50 Payroll
- Know how to set up the job analysis
- Be able to plan and create your own individual cost analysis and budgets
- Know how to set up new job records
- Understand how to use job templates and copy existing jobs
- Learn how to enter opening balances for existing costs and revenue
- Know how to assign stock issues, purchase invoices and bank payments to a job
- Be able to create and process purchase orders to show committed costs
- Be able to produce reports to show current costs, profitability and work in progress figures
- Know how to set up the charging structure for labour within Sage 50 Job Costing
- Know how to record timesheet entries and transfer information to Sage 50 Payroll
- Understand how to use job enquiries to show the total costs, budgets and revenue details on screen
- Know how to generate sales invoices and post to Sage 50 Accounts

Other options available
Private and Online Training

Sage Bookkeeping Stage 1

e-Learning 4hrs Course
12wk licence £55 + VAT
CD Rom £45 + VAT

What do I learn?
This course facilitates your understanding of manual bookkeeping. You will learn the theory of double-entry and put this into practise. To view these principles within a computerised set of books, you will then use a simulated version of Sage Accounts.

By the end of this course you will:
- Understand the basic principles of double-entry bookkeeping in a manual set of books and apply these within a computerised accounts system
- Learn how to use the PEARLS rule to work out debits from credits
- Understand the bank entries in your books alongside the equivalent entries in your bank statement
- Learn how your business transactions are used to build the trial balance, profit and loss and balance sheet reports
- Become familiar with the impact of posting customer and supplier transactions
- Be aware of how VAT impacts your entries and the accounts in your books
- Understand how the manual double-entry bookkeeping you practised is applied in your computerised version of Sage Accounts
- Gauge your understanding of the basics of bookkeeping by taking the quizzes and the final course test

What’s next?
Build on your knowledge of double-entry bookkeeping by learning the Bookkeeping Stage 2 course. This is also available online or via a CD ROM.

Find out more. Call 0800 33 66 33 or visit www.sage.co.uk/training
Sage Bookkeeping Stage 2

**e-Learning 5hrs Course**
12wk licence £55 + VAT
CD Rom £45 + VAT

**What do I learn?**

This course builds on your knowledge of double-entry bookkeeping. You will understand the impact of transactions in your books and view these in a computerised accounts system. You will also learn how to maintain accurate bookkeeping records and extract the information you need to run your business.

**By the end of this course you will:**

- Review the basics of double-entry bookkeeping
- Learn the principles of accruals and prepayments together with the transactions that need to be entered for these
- Understand key methods of fixed asset depreciation and how this is recorded in a manual set of books
- Become familiar with purpose of the bank reconciliation and how you should match your business transactions with your bank statement
- Be able to account for bad debts and write offs
- Learn how to apply common business performance measures
- Understand how the manual double-entry bookkeeping you practised is applied in your computerised version of Sage Accounts
- Gauge your understanding of the bookkeeping principles by taking the session quizzes and the final course test

**What’s next?**

Apply your new bookkeeping skills to your version of Sage 50 Accounts or Sage Instant Accounts by learning the Sage 50 Accounts or the Sage Instant Accounts courses. These are available as Self study courses (workbooks), online or via a CD ROM and via classroom training.

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**Book your course today. Call us on 0800 33 66 33 or visit www.sage.co.uk/training**
What is Sage Certification?
You can get Sage Certification by simply passing a short online exam. This is designed to test your new skills using Sage software. You can get Sage Certification for Sage 50 Accounts, Sage 50 Payroll and now Sage Instant Accounts software. If you want to prove you’re an experienced Sage software user, Sage Certification is the ideal next step in your training development.

What should I expect?
Exams last one hour and, as it’s online, you have the convenience of taking it at your desk at a time that suits you. The test includes drag and drop scenarios, multiple choice questions and simulations on using your Sage software.

Is it for me?
With Sage Certification you’ll have a credible certificate to boost your CV and prove you’re a capable Sage software user. Businesses who want to boost their workforce skills and improve morale will also benefit from having Sage Certified people.

Sage Certification exam syllabus
There are various levels of Sage Instant Accounts, Sage 50 Accounts and Sage 50 Payroll Certification each level addresses different aspects of the Sage Instant Accounts, Sage 50 Accounts or Sage 50 Payroll software. It is recommended that you begin and complete Level 1 before moving onto the advanced levels, although this is not compulsory.

Test your skills for free
Before you take your certification exam, we recommend you assess your knowledge of your Sage software.

You can do this by taking a free, online diagnostic test from http://www.sagecertification.co.uk/q4/open.dll

To login, enter the word Test in both the Name and the Group, click enter, and then select the diagnostic test of your choice.

On completion, these tests will provide you with online feedback.
Sage 50 Accounts exam syllabus

Sage Certification will test your knowledge in the following areas:

Level 1
- Use shortcut keys and navigate around your software
- Deal with company settings and access rights
- Backup, restore and check your data
- Configure the chart of accounts
- Create and maintain nominal records and budgets
- Prepare, plan and post opening balances
- Set up customer details, defaults, terms and status
- Set up supplier details, defaults and terms
- Work with bank, cash, credit card payments and receipts
- Post invoices and credit notes
- Record customer receipts and disputed items
- Post payments, match credit notes and payments on account
- Post journals
- Check and correct transactions

Level 2
- Perform a bank reconciliation
- Apply search criteria, multiple searches and wild cards
- Review the ageing frequency on outstanding invoices, age invoices and produce ageing reports
- Understand the different types of customer correspondence
- Flag invoices in dispute, write off customer or supplier transactions and adjust VAT accordingly
- Set up and process recurring transactions
- Set up and post depreciation and dispose of an asset
- Set up and process prepayments and accruals
- Deal with the VAT return and run the year end
- Produce profit and loss, balance sheet, budget reports, departmental reports and transfer basic information to Microsoft Excel and Word
- Understand and interpret the results from your management reports

Level 3
- Plan a stock system
- Create product records
- Set up a product assembly
- Enter opening balances for stock levels
- Perform a stock take and make adjustments
- Perform a stock period end and a year end
- Set up and maintain pricing and discount structures
- Create and process sales and purchase orders
- Create multiple delivery addresses
- Create quotes and pro-forma documents
- Create product invoices and credit notes
- Setup recurring invoices and orders

Sage 50 Payroll exam syllabus

Sage Certification will test your knowledge in the following areas:

Level 1
- Use shortcut keys and navigate around your software
- Deal with access rights
- Backup, rollback and restore your data
- Set up legislation and company details
- Create employee records, personnel records and use global changes
- Enter year to date values
- Set up pay elements
- Process your payroll run
- Set up and use pension schemes, company loan schemes and produce the P32
- Reset payments and use the timesheet entry
- Deal with new starters and leavers
- Understand the pay review and variance settings
- Advance holiday pay and record holidays and absences

Level 2
- Work with the Nominal link to Sage Accounts
- Export data to files
- Import data into Sage 50 Payroll
- Use the Microsoft integration tools and task reminders in Sage 50 Payroll
- Deal with attachment of earnings orders
- Set up and process student loans
- Apply SSP, SMP, SAP and SPP to your payroll
- Understand the payroll tax month end process
- Use e-banking in Sage 50 Payroll to make BACS payments
- Process the payroll over the tax year end and work with historical data
- Deal with the payroll tax year end
- Understand the audit trail and HMRC inspection reports
- Make E-submissions
- Produce reports from Sage 50 Payroll
Sage ACT!
exam syllabus

Sage Certification will test your knowledge in the following areas:

Users exam
- Navigate the software and define settings
- Create contact records and use the contact list
- Add notes and history to a contact record
- Perform lookup and advanced searches
- Create letter templates and perform mail merges
- Send emails and perform email mail merges
- Use Outlook Synchronisation
- Record activities onto a contact record
- Create opportunities on a contact record
- Create group and companies
- Perform smart tasks

Administrators exam
- Create new databases and users
- Import and export data
- Use and amend dashboards
- Perform database maintenance
- Customise database fields
- Customise database layouts
- Customise menus and toolbars
- Customise and create smart tasks
- Use the Accounting link
- Search for duplicate records and work with global changes

Private and Onsite Training

Onsite Training
From £999* per day + VAT

Can’t come to us? Let us come to you

We know that all businesses are different, and so have different training needs. And we realise that it’s sometimes hard to train more than one person in a business, both time-wise and financially. Train several people - at one time, in one place, for one low price with the option to pick and choose from up to 8 sessions from any of our courses.

Is it for us?

Enjoy the benefits of Sage Training, without leaving the office:
- Choose any classroom course or combination of sessions
- Learn in a more convenient location
- A cost effective way of training several people at once (up to 12)
- All delivered by a dedicated Sage trainer

Example
4 x sessions Payroll stage 1
4 x sessions Accounts stage 1
or
8 x sessions from any course

To find out more or to book your course, call 0800 33 66 33 and speak to one of our advisors

* Please note: If the training is required outside of the UK mainland or at a remote location, additional expenses may apply.
Terms & Conditions

Classroom & Private Training

A. Training contract terms

In these Terms, “we” means Sage (UK) Limited and “you” means the person or business that purchases delegate places on classroom courses at our premises and/or private courses on your premises, as set out in the invoice.

1. These Terms apply to all contracts for the provision of training services to you for the exclusion of any other terms specified by you or any of our previous Terms.

2. All prices quoted in marketing materials, including on our websites and in any conversations with our staff are subject to confirmation in writing and are exclusive of VAT, which will be chargeable at the rate fixed by legislation at the date of supply.

3. All invoices are due for payment in full within 14 days of the date of invoice. We may at our sole discretion extend the date for payment in full or allow you credit so that you can pay in instalments. If we allow you credit, we may require you to enter into a credit agreement as a condition of our providing that credit.

4. We reserve the right to charge interest on any invoices which remain unpaid beyond the due date at the rate of 4% per annum over Lloyds Bank TSB plc base rate from time to time from the due date until the date of payment in full.

5. Our failure at any time or for any period to enforce any one or more of these Terms shall not be a waiver of them or a waiver of our right to enforce such Terms in the future.

6. Each of the above and below Terms shall be read and construed independently of each other so that if one or more is held to be invalid for any reason whatsoever, then the remaining Terms shall be valid.

Further, if any Term is found to be void, but would be valid if some part of it were deleted, then such Term shall apply with such modification as may be necessary to make it valid and effective.

7. We shall not be responsible for any failure to perform our obligations due to circumstances beyond our control.

8. No amendment or variation to these Terms shall be effective unless confirmed in writing by one of our authorised representatives.

9. These Terms are governed by English Law and we and you submit to the exclusive jurisdiction of the English courts.

B. Additional terms and conditions

If we agree to deliver a private training course on your premises, the following additional Terms apply:

1. The day rate includes a day rate supplement of £100 minimum which is exclusive of VAT.

2. The cost of any arrangements for the provision of lunch and refreshments during the course of the day, to the delegates and to the trainer, shall be your responsibility.

3. We alone shall provide sample data (courseware) for the purposes of illustration and for the effective conduct of the course in question. We shall pre-check all data provided, whether on our or your computer systems, for viruses and shall clean the same using the latest virus protection technology. Under no circumstances will we load or utilise your own live, archived or dormant data.

4. Please note, it is your responsibility to ensure your virus checking software is up to date and prevents the introduction of any viruses.

C. Rescheduling and/or cancellation of our classroom courses

Please note that all bookings for our classroom courses are accepted on the basis that the following charges will apply to cancellations or requests for rescheduling.

1. Cancellation charges are as follows:

1.1 If notification is received 28 working days or more in advance of the scheduled date of the course, 50% of the fee already paid will be refunded.

1.2 In respect of notifications of cancellation received less than 28 working days in advance of the scheduled date of the course, there can be no refund.

2. Rescheduling charges are as follows:

2.1 For requests received 28 working days or more in advance of the scheduled date of the course, there is no rescheduling charge.

2.2 For notification given between 0 and 14 days inclusive before the course date, a charge of £50 (+ VAT) per course will be charged to reschedule.

2.3 For requests to reschedule received less than 14 working days before the course date, there will be no refund of the fee already paid and the full rate will apply in relation to the rescheduled date.

3. In the event of non-attendance where payment has been received, there shall be no refund and in the event of non-attendance where the fee has not been received, the fee will remain due and payable.

D. Rescheduling and/or cancellation of private classroom courses or private training courses on your premises

Please note that all bookings for private classroom courses or private training courses on your premises are accepted on the basis that the following charges will apply to cancellations or requests for rescheduling.

1. Cancellation charges are as follows:

1.1 If notification is received 28 working days or more in advance of the scheduled date of the course, 50% of the fee already paid will be refunded.

1.2 In respect of notifications of cancellation received less than 28 working days in advance of the scheduled date of the course, there can be no refund.

2. Rescheduling charges are as follows:

2.1 For requests received 28 working days or more in advance of the scheduled date of the course, there is no rescheduling charge.

2.2 For notification given between 14 and 27 working days inclusive before the course date, a charge of £125 (+ VAT) per day will be charged to reschedule.

2.3 For requests received to reschedule less than 14 working days before the course date, a charge of
2250 + VAT (per day) will be charged to reschedule.
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Self Study
Software and materials licence agreement

1. What this agreement is about

a. This agreement describes how you are allowed to use the self-study course materials which includes any certification, e-learning information and other materials displayed on the website, the CD Rom, any software and any written materials that form part of the self-study course (the "materials") that relate to the self-study course for which you have paid the appropriate fee to undertake the course.

b. If we have supplied or otherwise provided you with access to any software as part of the course, your use of that software will also be governed by our standard software licence agreement for that software (the "software licence agreement"). If the terms of the software licence agreement and this agreement disagree (except in relation to paragraph 4d below), the terms of the software licence agreement will apply.

c. If there is any difference between the paper copy of the agreement and any electronic version on our website, in the CD Rom or the software, the paper copy will apply. Please make sure you are happy with all the terms in this agreement before you start the course or undertake certification.

2. How you indicate that you accept this agreement, and when this agreement starts

a. You accept every term of this agreement if you pay the appropriate fees and you do any of the following:
- tick a box or click on a button (or something similar) when asked to confirm that you accept this agreement on our website during the installation process of the software (as appropriate); or
- open the sealed packaging of any materials; or
- install the software and keep it installed for longer than 5 days; or
- access the certification area of the website; or
- insert the CD Rom into a computer.

This agreement starts from the date you accept this agreement in any of these ways.

b. If you accept this agreement, you can use the materials as described in this agreement and any relevant documents (such as the software licence agreement) we have provided with this agreement. By entering into this agreement, you and we agree to be bound by and to fully keep to it (and any relevant documents).

c. If you do not want to enter into this agreement, you should not use the materials and immediately and permanently delete them from any device. You should then return to us all physical materials within 10 days. Where you are undertaking the course via the e-learning route, you should leave the website and immediately inform us of your decision not to proceed (we will let you know how to do this when you contact us).

d. If you are not satisfied with the course or have another problem with it, please email our customer care team on customer.experience@sage.com or call 0845 111 55 55.

3. Who this agreement is between

This agreement is between:
- us, Sage (UK) Limited [company registration number 1045967, registered office: North Park, Newcastle upon Tyne, NE13 9AA]; you, the person or organisation authorised to undertake the course and use the materials and software.
- the person or company (if any) providing you with finance
- our training providers
- Companies which we use to help us send you post and other communications
- Research companies
- Event organisers
- The owners of any third-party software
- The Sage Group plc (which owns us)

4. Your rights to use the materials

a. If you accept this agreement in one of the ways set out in 2 above we give you the right (called a license) to use the materials in the way described in this agreement.

- you may not use the materials in any other way however, please read paragraphs 1b and 5a about how you can use them as described in other documents from us.
- Your licence is not exclusive, which means that we may grant the same and similar rights to others.
- You must only use the materials for one person’s training requirements (the ‘student’). You must buy additional licences from us if more people wish to undertake the course.
- You can only use the software and access the e-learning materials (where applicable) for the limited period we tell you about in the relevant documents or when you purchased your licence to undertake the course (where appropriate). After this time, you will not be able to use the software or access the e-learning materials without buying an additional licence from us.
- You cannot transfer any part of the materials to any other person or organisation. For example, you cannot sell the materials. If you become insolvent, an insolvency practitioner may not pass the materials as parts of your assets.

5. Limits on using the materials and software

a. Materials owned by others

The materials may be accompanied or include other materials which we do not own (‘third-party materials’). You cannot use the third-party material by itself - you can only use it as part of the course and you agree to keep to any licence agreements provided with third-party materials. If there is no licence agreement with that third-party material, this agreement will apply to how you use that material.

b. Altering or copying the materials

You must not alter the materials or copy (or in the case of e-learning download) any part of the materials or allow anyone else to do so, unless we tell you that you may in writing.

c. How we use information about you

We will use any information you give us under this agreement to:
- manage how you use our software;
- meet our obligations under this agreement or any other agreement we have with anyone who provides licenses to us (our licensors), or our subcontractors;
- contact you to see if you would like to take part in our customer research;
- contact you about our other products and services and those of others which we think you will be interested in.

If we do contact you in this way, we will try to speak to the relevant person in your organisation, and we may contact you directly, or use other organisations which we have hired to contact you for us.

d. We may give information to other companies in our group of companies, our licensors and contractors, and other organisations described in relevant documents.

For example, we may give information to the following:
- Your software supplier (if you have one)
  - The person or company (if any) providing you with finance
  - Our training providers
  - Companies which we use to help us send you post and other communications
  - Research companies
  - Event organisers

e. Unauthorised use of the materials

The following are examples of things you must not do (or allow any one else to do) with the materials:

- You must not use the materials in any way other than as set out in this agreement, the relevant documents or as allowed by us in writing.

Only the student may use the materials. You must not allow anyone else to access, install or use the materials in any way, or give anyone else any right (of any kind) to access, distribute, use or benefit from them in any way.

- You must not install the materials on more than one computer (including laptop, PC or other computing device) at any one time.

- You may not use the materials to help you develop your own training course or materials.

If we believe that the way you use the materials may break any part of this agreement, we will check by asking one of your instructors, directors or similar senior managers to confirm to us in writing (using a form which we will provide to you) that you have kept to all parts of this agreement.

f. Ownership of the materials

Although you have rights to use the materials described in paragraph 4, you do not own any of the intellectual property rights in the materials. Intellectual property rights, in summary, the rights an owner has to say how certain things, like literature, films and software may be used. We, or the third party owners described in paragraph 5a above, continue to own the intellectual property rights in the materials. The only rights you have to the materials are the licence to use the materials as described in paragraph 4 and any other rights we give you under this agreement.

6. E-learning and certification

a. This paragraph 6a applies to you if you have purchased a license to undertake certification or the e-learning course.

You must only undertake certification or the e-learning course and use the associated materials in a manner consistent with the terms of this agreement and any relevant documents.

From time to time we may change the material which forms part of certification or the e-learning course.

We will try to make sure that the sections of our website which contain certification or e-learning materials are free from viruses; however, we cannot guarantee this. We recommend that you use your own virus-protection software.

We cannot guarantee that our website will be compatible with your browser or computer set-up, or that your access to our website will not be interrupted (this may be beyond our control).

From time to time we may temporarily stop providing access to our website, for maintenance, repairs or other reasons. If possible, we will try to make sure this happens outside normal business hours.

7. Our guarantees relating to the course, materials and software

a. We guarantee that, as far as we are aware, the materials do not infringe the rights of third parties. If we do not meet this promise, then we will either provide replacement materials to correct the problem or refund the fee paid for the course. If we give you a refund, this agreement will immediately end.

b. We do not guarantee:

- that the materials will meet your individual needs;
- that there will be no interruptions in your use of the materials;
- that you will get particular results from the materials; and
- the standard of the results you will get from using the materials.

The fact that you have told our representative about how you intend to use the materials will not affect this paragraph as the course been developed for many different types of organisation.

c. Except where paragraph 8c applies, this agreement describes all of our guarantees relating to the materials and the course. Unless this agreement says otherwise, we are not bound by any other contract terms, warranties or other type of promise. If, by law, a particular term, warranty or other promise relating to the materials or software would automatically be included in this agreement, we will only be bound by that term, warranty or promise to the extent set by law.

8. Our liability and responsibility to you if something goes wrong

a. Our liability (including for the avoidance of doubt) under this agreement will be limited to paying you an amount equal to 125% of the value of the fees you paid for the licence to undertake the course.

b. You are better placed to understand the risks to your business that may occur as a result of your use of the materials. Accordingly, we will not be responsible for any of the following, even if we knew or should have known there was a possibility you could experience the problem:

- financial or similar loss of any kind, including, for example, loss of profits, business, estimated savings or...
goodwill, however the loss is caused; any interruption to your business or loss of or damage to information, however that interruption, loss or damage is caused; nothing in this agreement will prevent or limit your or our liability for fraud, death of or personal injury to any person as a result of our negligence, or any legally binding promise, automatically given by law that we cannot exclude.

d. Your and our responsibilities under this agreement are reasonable because they reflect that:

e. Nothing in this agreement will give anyone any right or benefit under the Contracts (Rights of Third Parties) Act 1999, except that the owners of third-party software can benefit from paragraphs 4, 5, 9 and any other part of this agreement that applies to third-party software.

This agreement is governed by English law and you and we both agree that the English courts will be the only courts that can decide on legal disputes or claims about this agreement.

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3.5 and 10 Day Training Passport

1. Description

The 3.5 and 10 Day Training Passport enables our - Instant Accounts customers using the 3.5 day passport or any of our customers using the 5 or 10 day passports, to enjoy significant savings while acquiring the comprehensive, knowledge and skills needed to achieve competency in our software products. The 3.5 and 10 Day Training Passport is a cost-effective solution for individuals who wish to take certain forms of training supplied or offered by us. They cover up to 3, 5 or 10 days of classroom training or the equivalent non-classroom based training (e.g. Self Study or e-Learning) over six consecutive months for the 3 or 5 passports or 12 consecutive months for a 10 day passport.

2. Availability and Usage

2.1 The Training Passport is available for use by any of your employees within the same business, which uses our software and which purchases the Training Passport ("You"). The Training Passport is not transferable from you to any other business (including another of your customers).

2.2 The Training Passport is valid for six months from the date of purchase for 3 and 5 day passports or 12 months for a 10 day passport (the "Validity Period").

2.3 If the Training Passport is lost or stolen, you or your employee who is using the Training Passport must notify us immediately, so that we can issue a new Training Passport detailing the balance of training days outstanding on the previous Training Passport subject to payment by you of a replacement fee of £5 plus VAT (or our standard replacement fee at the time of replacement if different).

3. Learning Covered

3.1 The Training Passport can be used on all instructor-led public courses (i.e. End User or Accountants Products) and workshops listed in the our Training Catalogue, with the exclusion that the Training Passport does not cover any Business Partner or Accountants Club Training and Accreditation courses. The Training Passport can also be redeemed against any form of self study training, each accounting for the relevant number of equivalent class days.

3.2 We provide instructor-led training courses by reference to their description, as detailed in our Training Catalogue. It is your responsibility to ensure that your course participants have the knowledge, skills & experience appropriate to the course outline.

3.3 Each course or non-classroom based learning can be reserved by phone. We advise booking at least six weeks in advance to ensure availability on a specific date.

3.4 Each Training Passport provides up to 3, 5 or 10 days of either classroom training or the equivalent non-classroom based training (or a mixture of the two) during the Validity Period.

3.5 We offer training advice and guidance as part of the Training Passport purchase. This facility enables you to contact us for guidance regarding the range of available courses. However, it is your responsibility to ensure suitability for your needs.

3.6 The Training Passport does not provide access to services offered via the SageCover contract (for example, the KnowledgeBase or Telephone Support).

4. Payment

4.1 All invoices are due for payment in full within 30 days of the date of invoice and in any event, in advance of attending any training. We may at our sole discretion extend the date for payment in full or allow you credit so that you can pay in instalments. If we allow you credit, we require you to enter into a credit agreement as a condition of our providing that credit.

4.2 We reserve the right to charge interest on any invoices which remain unpaid beyond the due date at the rate of 15% per annum on the outstanding amount. If interest is charged, all sums which become due under this agreement shall be due to the relevant party.

4.3 We reserve the right to charge interest on any invoices which remain unpaid beyond the due date at the rate of 15% per annum on the outstanding amount. If interest is charged, all sums which become due under this agreement shall be due to the relevant party.

5. Cancellation and Rescheduling of Classroom Courses or Workshops

5.1 Any classroom course which is booked using the Training Passport and then subsequently cancelled or rescheduled between 15 to 28 working days inclusive may result in those cancelled days being deducted from the Training Passport as if the individual had attended the course.

5.2 If an individual is unable (for any reason whatsoever) to attend a classroom course which is booked using the Training Passport and does not contact us to cancel or reschedule their attendance in advance, we may delete the relevant number of day(s) for that course from the Training Passport as if the individual had attended the course. Persistent non-attendance of booked courses shall constitute misuse of the Training Passport entitling us to cancel the Training Passport without refund.

6. General

6.1 These Terms apply to all Training Passports to the exclusion of any other Terms and/or we or any of our previous Terms in relation to any previous passports or previous types of passport available from us (i.e. the Individual or Corporate Passport) and/or any Accountants Division Corporate Passport.

6.2 A cooling off period of 14 days from date of purchase is given subject to no classroom courses having been booked and no non classroom based training having been taken during this period.

Where this is the case, a full refund may be applied at your request and with our agreement. After the 14 day cooling off period has passed, no refunds are available.

6.3 The Training Passport cannot be used in conjunction with any other offers.

6.4 The special fees chargeable for the Training Passport are not subject to any further discounts or preferential terms, which may or may not be in existence between you and us.

6.5 Any unused days remaining on the Training Passport at the end of the Validity Period cannot be refunded, transferred or carried over.

6.6 We reserve the right to modify schedules and discontinue courses from our public training schedule at any time, without incurring any liability as a result of such modifications or discontinuance, save in relation to permitting rescheduling of attendances where a course is discontinued.

6.7 Copying all intellectual property rights in the Training Passport and in all courses and course materials or other relevant subject matter (e.g. any self study or e-Learning) remains your property or the property of our partner responsible for developing that course. You agree not to, and agree to ensure that your employees do not reproduce, sell, hire or in any other way misuse course materials.

6.8 Course places are subject to availability and therefore, we cannot guarantee spaces on all courses until a booking has been made. Once a booking has been made, guaranteed spaces are subject to clause 6.6.

6.9 Only your employees can take training using the Training Passport.

6.10 Courseware will not be provided without attending the associated training course.

6.11 Subject to clause 6.2 above, we reserve the right to cancel the Training Passport at any time and without refund for suspected or actual misuse, fraud or other irregularities.

6.12 These Terms are governed by English law and we and you submit to the exclusive jurisdiction of the English courts. © Sage (UK) Limited 2008 T&C 11/08