# PowerConcepts Computer Training

## Who are we?

PowerConcepts in one of Canada's premier computer training companies. We have provided small to large scale training to several key organizations across British Columbia. We can guarantee a professional, interactive, and practical training experience that benefits the individual and the company. PowerConcepts specializes in providing high quality professional development courses that not only enrich skill set, but also quality for Professional Development Hours. We are proud to be an accredited school that offers Gold Seal Certification to all students that complete training.

## What can we offer?

PowerConcepts provides the convenience of online training with the benefit of having instructor-led courses.  We use virtual platforms to provide instructor-led, hands-on training courses.  These interactive training courses will cover the same content as our regular in-person courses.  We also offer a two-year *free* refresher policy that comes into effect after student complete their course. Meaning at any time students may attend either another remote session or one of our in-person training sessions at no additional cost. PowerConcepts will also provide student access to our course video library with informative, additional information. Follow this link to view our library.

## Requirements?

Prior to taking our virtual courses, we require that students have the Application/Program installed and downloaded on their computer. We also ask that students have two monitors; one for watching and one for applying the new learned skills. This could be two monitors on one computer or a computer and another device or computer.

| | Microsoft Office Basics | Microsoft Office Core | Microsoft Office Expert |
|---|---|---|---|
| **Target Student** | People transitioning to new positions that will require some computer skills and basic knowledge of Microsoft Office | People moving to or already working in an Office environment that have been using Word, Excel and Outlook but who have not had systematic training and want to fill knowledge gaps. | People wanting or needing a high-level of skill to be the office expert or to create documents, and reports beyond day to day requirements need to take these Expert courses |
| **Goals** | Be able to demonstrate basic skills in Microsoft office as part of their future work. | To be confident and capable working in most office environments | To be an Expert user who is able to tackle demanding projects and will be able to find solutions for sophisticated office projects |
| **Requirements** | Basic knowledge of how to use the computer. If not, then add Computer Essentials prior to MS Office Basics | Working knowledge and experience with Word, Excel and Outlook or have completed Office Basics | Confident with Word, Excel and Outlook or have completed Office Core Program |
| **Description** | This program will give participants a basic knowledge of Word, Excel and Outlook as well as a good understanding of file management and general computers skills | This program will raise the skill level of all participants so that they are able to utilize these powerful tools to accomplish most skills required in day to day office work | This program will enable participants to create and manage sophisticated documents in Word. The Excel portion will focus on creating multi argument formulas, databases and pivot tables. Outlook Strategic Management will enable participants to manage large volumes of email and also to delegate and organize a team. |
| **Courses** | • Computer Basics (for clients with minimal computer skills)<br>• Microsoft Office Basics (for clients with minimal exposure to Microsoft Office) | • Microsoft Excel Core<br>• Microsoft Word Core<br>• Microsoft Outlook Core | • Excel Expert Forms and Functions<br>• Excel Expert Database Management<br>• Word Expert<br>• Outlook Strategic Management and OneNote<br>• Optional specialties include<br>• PowerPoint, Publisher, Visio and Adobe Acrobat |

| | Bookkeeping Specialist |
|---|---|
| **Target** | This program is for participants who will be doing bookkeeping for their own company or who will be managing the books for one or more companies |
| **Goals** | Level 1 – To be able to manage day to day bookkeeping as part of a team<br>Level 2 – To perform all bookkeeping duties |
| **Requirements** | Good working knowledge of a computer. |
| **Description** | People with little or no bookkeeping experience will learn the fundamentals of bookkeeping and how to also use Excel for basic budget management. In Level 1 Sage and/or QuickBooks participants will learn how to work with day to day operations of the program.  In Level 2 Sage and/or QuickBooks participants will grasp a complete knowledge of the programs and how to manage monthly and annual tasks including payroll and year-ends. |
| **Courses** | • Manual Bookkeeping (required for anyone that does not have prior experience with bookkeeping)<br>• Sage and/or QuickBooks Level 1<br>• Sage and/or QuickBooks Level 2 |

## Our Guarantee

PowerConcepts has trained over 40,000 people with over half of those in the Okanagan Valley.  PowerConcepts is widely recognized and our courses are a credit to anyone who has them listed on their resume.  We guarantee our training which means that before the course, our students are entitled to download *free* exercise files that correspond with the reference materials used during their training and after so that they can further practice their skills. Students are encouraged to call and receive *free* support from one of our instructors after they've completed training.

## Free Refreshers

Our clients can take any of our courses over again (multiple times if they wish) *at no cost* for a period of two years from the original course.  Our bookkeeping courses have a one year free refresher period. Simply go on-line and sign into the course and it will indicate "no charge".

## Certification

PowerConcepts is proud to be an accredited facility. All of our courses are Gold Seal Certified, and students will walk away with certification upon course completion.

# Microsoft Office Basics

## Target

This course is designed for people transitioning to new positions that will require some computer skills and basic knowledge of Microsoft Office.

## Goals

*The goal upon completion of this course is to be able to demonstrate basic skills in Microsoft office as part of their future work.*

## Description

*This program will give participants a basic knowledge of Word, Excel and Outlook as well as a good understanding of file management and general computers skills.*

## Prerequisite

*Basic knowledge of how to use the computer. If not, then add Computer Essentials prior to MS Office Basics*

## Course Checklist

- *Computer Basics (for clients with minimal computer skills)*
- *Microsoft Office Basics (for clients with minimal exposure to Microsoft Office)*

All our courses are backed by our guarantee. We provide authorized Microsoft manuals for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Computer Basics

## *Course Description*

The main objective of this course is to introduce you to some of the essential commands, functions, and capabilities of today's desktop computers and Microsoft Windows. It is designed for computer users who want to become comfortable with their operating system and want to gain a more thorough understanding of the world's most popular operating software.

**Course Duration: 7 hrs**

## *Basic Skills Checklist*

The following list summarizes skills that students will be comfortable with after this course.

- Understand how to manage and manipulate multiple windows
- Get familiar with computer terminology
- Use and customize Windows screen
- Set up filing system
- Navigate in Internet using basic browsing tools
- Learn security tips
- Download and install programs

- Learn the correct startup procedure
- Discovering the desktop
- Using the mouse more effectively
- Associating computer components on screen
- Checking available disk space
- Discovering file sizes
- Creating sample files

## *Course Prerequisites*

Computer Basics is an introductory course and requires no prerequisites.

# Microsoft Office Basics

## Course Description

The objective of this course is to train participants in Microsoft Windows and Microsoft Office which includes Word, Excel and Outlook. This course will familiarize users with the Windows environment and features of Microsoft Office. It is designed for computer users who are new to these programs and need the kick to start working in a business environment.

**Duration: 12 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course

### Word

- Understand how to manage and manipulate multiple windows
- Get familiar with computer terminology
- Use and customize Windows screen
- Set up a filing system
- Navigate in Internet using basic browsing tools
- Learn security tips
- Download and install programs

### Excel

- Understand the screen, Screen Tips and Ribbon
- Create, edit, save, open and close workbooks
- Select cells for further action such as formatting, deleting, copying and pasting
- Using Autofill to copy or fill data or set up a series of data
- Insert or delete rows, columns or cells
- Rename, insert, delete, copy or move worksheets
- Create and edit simple formulas using math operators and cell references
- Use common functions
- Apply text and numeric formatting
- Enhance the worksheet using fonts, alignment, lines, borders, colors or patterns
- Preview and print worksheets and workbooks
- Set headers and footers for a worksheet
- Change margins, orientation or layouts

# Microsoft Office Basics

**Outlook**

- Understand how Outlook is setup and the different types of information that can be tracked
- Create, edit, send, open and manage messages
- Learn to use the ToDo bar to manage and organize all daily activities
- Use different types of options for managing messages such as voting buttons, flags or level of importance
- Include and manage attachments being sent or received with messages

- File and manage messages using folders
- Create or modify a signature for e-mail
- Create and edit appointments or events in the Calendar
- Create and modify contacts using the Contacts module
- Create and manage Tasks
- Set up and manage out of office messages

## Course Prerequisites

Participants should have completed the Computer Basics or have a working knowledge of using the computers.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Microsoft Office Core

## Target

People moving to or already working in an Office environment that have been using Word, Excel and Outlook but who have not had systematic training and want to fill knowledge gaps.

## Goals

The goal upon completion of this course is to be confident and capable working in most office environments.

## Description

This program is a three day course that will raise the skill level of all participants so that they are able to utilize these powerful tools to accomplish most skills required in day to day office work

## Prerequisite

Working knowledge and experience with Word, Excel and Outlook or have completed Office Basics.

## Course Checklist

- Microsoft Excel Core
- Microsoft Word Core
- Microsoft Outlook

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# Word Core

## Course Description

Learn to get the most out of Microsoft Word. Learn time saving shortcuts for selecting, navigating and formatting and create professional looking business documents such as letters, forms, and newsletters in a fraction of the time. Participants will learn key functions for using documents to manage project notes, details of jobs, notices, contracts and other administrative requirements. This course maps to the Microsoft MOS Core Exam. After reviewing all topics in the manual participants will be prepared to successfully write the Microsoft Office Specialist Core Exam.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Create and format documents
- Customize options and views
- Configure documents for printing or saving
- Insert and format objects such as Shapes, Images or SmartArt
- Create multi-level and bulleted lists
- Utilize page and section breaks

- Create, edit and format tables
- Apply references such as endnotes, footnotes and citations
- Use captions for pictures
- Generate table of contents and index
- Create QuickParts and manage building blocks

## Course Prerequisites

The course assumes that students have completed the Microsoft Office Basics course or have equivalent knowledge.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Excel Core

## Course Description

Learn to use Excel to create budgets, track costs and generate quotes. Learn tools and ideas that will save time and create professional looking proposals and plans. Participants with only a very basic knowledge of Excel will quickly progress to create basic databases, budgets, graphs, reports and the fundamentals of building equations. This course maps to the Microsoft MOS Core Exam. After reviewing all topics in the manual participants will be prepared to successfully write the Microsoft Office Specialist Core Exam.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Customize Excel options and views
- Create and manipulate tables
- Filter and sort data
- Apply formulas
- Use the correct syntax to insert functions
- Create and format cells and ranges
- Order and group cells and ranges

- Apply cell ranges and references in formulas and functions
- Summarize data with functions
- Apply conditional logic in functions
- Format and modify text with functions
- Create and format charts and objects

## Course Prerequisites

The course assumes that students have completed the Microsoft Office Basics course or have equivalent knowledge.

# Outlook

## Course Description

Outlook is a key communication tool in most companies yet is commonly underutilized and a time hog with too much time spent just responding to email. Learn powerful organizational strategies that can change the way you work and save you hours of time every week. Learn to navigate quickly, and far less, through Outlook and how to create a powerful single page dashboard that will let you strategically manage all your appointments, tasks, email and follow-up calls on a single page. This course maps to the Microsoft MOS Exam. After reviewing all topics in the manual participants will be prepared to successfully write the Microsoft Office Specialist Outlook Exam.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Understand how Outlook is set up and types of information it can track
- Create format and send messages
- Create or modify signatures for e-mail
- Choose customized Outlook settings and views
- Organize and manage messages using quick steps
- Utilize the powerful search tools in Outlook

- Create rules and out of office notices
- Use the To Do bar to manage tasks
- Manage multiple calendars
- Create and organize tasks, appointments, meetings and events
- Create and manage notes, tasks and journals
- Utilize options such as voting buttons, flags or level of importance
- Create contacts and groups

## Course Prerequisites

The course assumes that students have completed the Microsoft Office Basics course or have equivalent knowledge.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Microsoft Office Expert

## Target

This program is designed for people wanting or needing a high-level of skill to be the office expert or to create documents, and reports beyond day to day requirements.

## Goals

The goal upon completion of this course is to be an Expert user who can tackle demanding project and will be able to find solutions for sophisticated office projects.

## Description

This program will enable participants to create and manage sophisticated documents in Word. The Excel portion will focus on creating multi argument formulas, databases, and pivot tables. Outlook Strategic Management and OneNote will enable participants to manage large volumes of email and to delegate and organize a team.

## Prerequisite

Participants must be confident with Word, Excel and Outlook or have completed the Office Core Program.

## Course Checklist

- Excel Expert – Forms and Functions
- Excel Expert – Database Management
- Word Expert
- Outlook Strategic Management and OneNote
- Optional additional courses are available

All our courses are backed by our guarantee. We provide authorized Microsoft manuals for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Microsoft Excel Expert- Part 1
# Forms & Functions

## Course Description

If you are experienced in Excel but need to start building more complex calculations and to build sequential operations, then join us for this advance Excel course to learn how to assemble complex operations simply one step at a time.  Also learn to manage multiple sheets or multiple books and to apply protection, navigation and form controls.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Use advanced functions such as
    - Information
    - Lookup and reference
    - Conditional logic
    - Conditional summary
- Create, modify or remove a hyperlink
- Work with shared workbooks

- Add protection to workbooks and worksheets
- Track changes
- Consolidate data
- Create and run macros
- Add form controls

## Course Prerequisites

The course assumes that students have completed the Excel Core course or have equivalent knowledge.

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# Microsoft Excel Expert- Part 2
# Database Management

## Course Description

Need to do time tracking of various staff on various projects?  Need to download reams of data from an online data source?  Now you need to make sense of it all!

Learn how Excel will capture potential data errors, minimize input errors and then automate the updating of datasets into Excel table and then into Pivot Tables and Pivot Charts. Also learn strategies for collecting and validating data with tables.  Understand how to automate the collection and cleaning up of data using Power Query and then how to analyze with Pivot Tables. And also learn how to create dashboards for visually displaying data and using slicers to quickly filter and change graphical reports. Learn to use the new Excel's Business Intelligence (BI) Tools that can make updating and analyzing data a breeze.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Create tables and learn to sort, filter and report on data with a few clicks
- Add data validation, including using pick lists
- Remove duplicate data; circle invalid data
- Use data analysis tool

- Create and modify Pivot Tables
- Create and modify Pivot Charts
- Add calculations and custom functions within a Pivot Table
- Use slicers and filters with Pivot Tables
- Import data with Power Query

## Course Prerequisites

The course assumes that students have completed the Excel Core course or have equivalent knowledge.

All our courses are backed by our guarantee. We provide authorized Microsoft manuals for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Word Expert

## Course Description

Learn the full capabilities of Microsoft Word to create manuals, forms and even desktop publishing. Learn time saving skills like mail merge, tracking changes and document protection. Learn how to create and manage work group templates that will help all the members of your organizational team save time by using standard forms and documents. This course maps to the Microsoft MOS Expert Exam. After reviewing all topics in the manual participants will be prepared to successfully write the Microsoft Office Specialist Expert Exam.

**Course Duration: 6 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Merge letters, labels and e-mail using data sources
- Compare or combine documents
- Insert, modify or delete comments
- Track revisions made by one or more people
- Accept or reject changes made in a document
- Manage passwords or restrict types of access on a document

- Generate a table of contents or index in a document
- Work with section breaks and different headers and footers
- Use form fields
- Learn the skills needed to manage large documents, including using the navigation pane

## Course Prerequisites

The course assumes that students have completed the Microsoft Word Core course or have equivalent knowledge.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Outlook Strategic Management with OneNote

## Course Description

Tired of living in your Inbox? Maybe you shouldn't be there. Learn how to create a powerful time management dashboard in Outlook that will show you what you need to do on one screen and allow you to manage your priorities and schedule. Learn key setting changes in Outlook and a handful of keyboard shortcuts that can eliminate 100's of mouse clicks per day and keep you more focused on what is most important in your day and better manage and delegate work.

You'll also learn how to use Microsoft OneNote to organize, locate and share information. You will learn how to collect and organize notes, insert files, capture screens and enhance your notes for all types of projects. You'll learn how this tool automatically integrates with Outlook and can dramatically improve your ability to manage projects and collaborate with others. Tired of trying to keep track of meeting agendas and minutes? OneNote will change the way your team addresses the management of your meetings and simplify the creation and sharing of agendas, minutes and tracking of action items that come out of all the meetings you attend.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

**Outlook**
- Learn how to keep your Inbox empty on a daily basis
- Learn how to manage all priorities from a single dashboard
- Reduce the number of e-mails you need to send and become a better manager
- Run multiple projects simultaneously from Outlook and be able to completely manage and report on each one using custom screens

**OneNote**
- Transform the way your team manages meeting agendas, minutes and action items into a streamlined system that completely integrates with Outlook
- Learn how to capture all information that belongs to a project and share and collaborate on it in a single integrated tool

## Course Prerequisites

The course assumes that students have completed the Microsoft Outlook course or have a good working knowledge of Outlook.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Microsoft PowerPoint

## *Course Description*

Learn PowerPoint's commands, functions and capabilities and how to quickly create powerful and compelling presentations. The course starts with strategies on how to very quickly outline and create the "story" and then to learn to present the information in creative, clear and professional increments.

**Course Duration: 7 hrs**

## *Basic Skills Checklist*

The following list summarizes skills that students will be comfortable with after this course.

- Strategies for how to structure and create a successful presentation
- Format a presentation using Slide Masters
- Customize presentation options and views
- Set-up and run a slideshow
- Insert and format shapes and slides
- Insert and format images, media and SmartArt

- Insert hyperlinks, media clips and sound
- Apply transitions and animations
- Set timing for automatic transitions and animations
- Manage multiple presentations
- Presentation tools and annotations
- Protect and share presentations
- Create notes and handouts

## *Course Prerequisites*

Participants should have completed Microsoft Office Basics or have equivalent knowledge.

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# Microsoft Project

**Design, Manage and Track Projects**

## Course Description

Learn how to set up MS Project, create a realistic project and then report and Go Live with the project as well as track the progress. Learn to identity the risks in the project and how to best plan to mitigate the risks. This course assumes participants have little or no experience with MS Project and develops their skills to be able to build and manage a project. The course is Gold Seal certified and counts towards professional development training hour requirements for professionals.

### Course Duration: 14 hrs

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Set-up MS Project default settings to be conducive to a healthy project
- Create, edit and outline a task list, establish dependencies by linking tasks
- Understand how to create milestones and incremental deadlines in the project
- Complete a risk assessment of the project plan
- Customize and save views and tables
- Add and assign resources, work with project calendars and enter project costs
- Apply task type settings, set task constraints
- Add notes and links to external information important to the project

- Format views and the Gantt chart
- Resolve resource conflicts
- Print project information
- Customize reports
- Use the organizer to manage project elements
- Add in project rates, costs and fixed costs
- Create master projects, insert and work with subprojects
- Sort, filter and group information
- Understand how to go live and track a projects' progress
- Be able to create reports useful for project evaluation after the project is completed

## Course Prerequisites

The course assumes that students are knowledgeable of and comfortable using a computer.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Microsoft Publisher

## Course Description

The objective of this course is to introduce Microsoft Publisher commands, functions and capabilities. It is designed for computer users who are new to desktop publishing who want to gain a though understanding of Microsoft's desktop publishing package.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Navigate the Publisher window
- Open, save, close and view publications
- Use the rulers and guides
- Work with text boxes
- Create and manage objects
- Use the design gallery
- Format publications with the master page
- Layer and format objects
- Use the design checker to check for problems

## Course Prerequisites

Participants should have completed Microsoft Office Basics or have equivalent knowledge.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Visio

**Flowcharting, Organizational and Layout Drawings**

## Course Description

Visio is the ultimate tool for documenting processes, creating organizational charts and building "maps" of office layouts, systems and networks. Visio has a built in data connection that allows the creation of custom data sets that can be exported to Excel for analysis of the org. chart, process or systems.

In this course you will learn fundamental skills while creating several types of diagrams using Visio. You will create a directional map, a block diagram, a basic and cross-functional flowchart, an organizational chart and an office layout. As you create these drawings you will learn techniques to drag and manipulate Visio master shapes, create connections between shapes and apply styles to shapes, text and pages. You will generate an organization chart from imported data and edit custom properties to store additional information in your diagrams. You will learn shortcuts to enhance your productivity and use unique tools designed for each type of drawing. When you've completed to course, you will have a firm grasp of all of the skills needed to create any kind of diagram using Visio.

### Course Duration: 7 hrs

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Work with the screen, screen tips, ribbon and the quick access toolbar
- Identify the various types of drawings you can create
- Drag shapes from stencils, resize, rotate, align and transform them
- Use smart features such as numbering shapes automatically
- Apply title, borders, backgrounds and color schemes

- Quickly locate any master shape within the stencil library
- Create custom stencils
- Create an organizational chart
- Create a flowchart or cross-functional flowchart
- Create a process map
- Create an office floor plan to scale
- Integrate the shapes to a database to automatically create reports and summaries in Excel

## Course Prerequisites

The course assumes that students are knowledgeable of and comfortable using a computer. The student should also be familiar with the Microsoft Office program layout.

All our courses are backed by our guarantee. We provide Microsoft authorized reference materials for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Adobe Acrobat DC

**Creating and Organizing Interactive PDF Documents**

## Course Description

The main objective of this course is to introduce the interactive commands, functions, and capabilities of Adobe Acrobat DC. It is designed for computer users who are new to Adobe Acrobat who want to gain a thorough understanding of the world's most popular PDF (portable document format) package.

**Course Duration: 7 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Navigate to specific content within a PDF
- Search within single or multiple documents
- Extract content from a PDF
- Create PDF documents from word documents
- Create PDF documents using the print command
- Create a PDF document from multiple files
- Add stamps, watermarks and backgrounds with a digital signature

- Add headers & footers
- Add comments & mark up to a PDF
- Create PDF documents from a web site
- Arrange PDF document pages
- Edit content in a PDF document
- Customize page numbering
- Add bookmarks
- Add links
- Sign and secure a document
- Automatic Field Detection using The Prepare Form Wizard

## Course Prerequisites

The course assumes that students are comfortable working on computers.

# Bookkeeping Program

## Target

This program is designed for participants who will be doing bookkeeping for their own company or who will be managing the books for one or more companies.

## Goals

Level 1 – To be able to manage day to day bookkeeping as part of a team

Level 2 – To perform all bookkeeping duties independently

## Description

People with little or no bookkeeping experience will learn the fundamentals of bookkeeping and how to also use Excel for basic budget management. In Level 1 Sage and/or QuickBooks participants will learn how to work with day to day operations of the program. In Level 2 Sage and/or QuickBooks participants will grasp a complete knowledge of the programs and how to manage monthly and annual tasks including payroll and year-ends.

## Prerequisite

Good working knowledge of a computer

## Course Checklist

- Manual Bookkeeping (required for anyone that does not have prior experience with bookkeeping)
- Sage and/or Quickbooks Level 1
- Sage and/or Quickbooks Level 2

All our courses are backed by our guarantee. We provide authorized Microsoft manuals for every course, Microsoft approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Basic Bookkeeping Skills

## Course Description

The course will provide an overview of the fundamental principles and terminology that will apply when using accounting software programs. This is a required prerequisite for the Sage 50 or Quickbooks courses if no other bookkeeping training or background exists.

**Course Duration: 8 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Manual bookkeeping using journals and ledgers
- Rules of debit and credit
- Double-entry accounting
- Chart of Accounts and categories
- Types of Journals
- Ledgers and Sub-ledgers

- Accrual Accounting
- Accounting Terminology
- Learn what assets, liabilities and equity are
- Produce an income statement
- Prepare a balance sheet
- Trial balance

## Course Prerequisites

There are no prerequisites for this course.

All our courses are backed by our guarantee. We provide authorized vendor manuals for every course, vendor approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Quickbooks Part 1

## Course Description

The main objective of this course is to introduce you to the commands, functions and capabilities of Quickbooks. It is designed for computer users what are new to Quickbooks who want to gain a thorough understanding of one of the world's most popular accounting software packages.

**Course Duration: 12 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Moving around Quickbooks, using centers
- Understanding the chart of accounts
- General journal entries
- Writing cheques
- Memorized transactions
- Understanding items, entering inventory
- Entering and paying bills
- Creating invoices, sales receipts

- Creating credit memos
- Receiving payments
- Making deposits
- Basic payroll set-up
- Creating financial reports
- Backing up your data
- Year-end procedures
- HST/GST remittances

## Course Prerequisites

The course assumes that students have completed the Basic Bookkeeping course or have equivalent knowledge.

All our courses are backed by our guarantee. We provide authorized vendor manuals for every course, vendor approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Quickbooks Part 2

## Course Description

The main objective of this course is to introduce you to the commands, functions and capabilities of Quickbooks that were not covered in Part 1. It is designed for current users of Quickbooks who want to gain a thorough understanding of the advanced functions of one of the world's most popular accounting software packages.

The curriculum buildings on the first course and will proceed at an accelerated pace.

**Course Duration: 12 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Set-up of a company file
- Review and modification of preferences
- Reconciling a bank account
- Creating classes and reporting on performance by class
- Security, users, passwords
- Advanced payroll (benefits, ROEs, T4s)
- Setting up and charging finance fees

- Preparing customer statements
- Writing off bad debts
- NSF Cheques
- GST/PST remittance
- Using a credit card for purchases
- Payroll remittances

## Course Prerequisites

The course assumes that students have completed the Quickbooks Part 1 course.

All our courses are backed by our guarantee. We provide authorized vendor manuals for every course, vendor approved practice exercises, free backup and support. Please check with us about our free refresher policy.

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# Sage 50 (Simply Accounting) Part 1

## Course Description

The main objective of this course is to introduce you to the commands, functions and capabilities of Sage 50. It is designed for computer users who are new to Sage 50 who want to gain a thorough understanding of one of the world's most popular accounting software packages.

**Course Duration: 12 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Navigate in Sage 50
- Use general ledger features
- Use accounts payable features
- Use accounts receivable features
- Recurring transactions
- Understanding the chart of accounts
- Entering and paying bills
- Create invoices and receipts
- Perform transaction inquiries

- Generate forms and reports
- Generate management reports & examine business performance
- Set up suppliers
- Set up customers
- Set up sales taxes
- Year-end procedures
- Set up payroll
- Set up and use inventory

## Course Prerequisites

The course assumes that students have completed the Basic Bookkeeping course or have equivalent knowledge or experience.

All our courses are backed by our guarantee. We provide authorized vendor manuals for every course, vendor approved practice exercises, free backup and support. Please check with us about our free refresher policy.

# Sage 50 (Simply Accounting) Part 2

## Course Description

The main objective of this course is to explore the more advanced features and procedures in Sage 50. This course will cover modules not covered in the Part 1 course. It is designed for current users of Sage 50 who want to gain a thorough understanding of one of the world's most popular accounting software packages.

**Course Duration: 12 hrs**

## Basic Skills Checklist

The following list summarizes skills that students will be comfortable with after this course.

- Create and configure a company
- Enter historical data
- Enable budgeting
- Create and implement projects
- Set-up departments
- Advanced reporting: utilize reports and graphs
- Advanced inventory features
- Set-up multi-currency
- Utilize the year end function

- Create users and security
- Perform database management
- Bank reconciliations
- Set up credit cards
- Advanced payroll features (ROE, T4, benefits)
- NSF cheques
- Bad debts
- Edit forms

## Course Prerequisites

The course assumes that students have completed the Sage 50 Part 1 course.

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