

Sage Business Cloud Accounting: Student Introduction

The **Sage Education Alliance Program (EAP)** supports students in becoming the business builders of tomorrow by providing cloud-based business solutions to advance their skills in accounting, bookkeeping, tax, payroll and entrepreneurship, in the classroom at no cost. We're dedicated to empowering students to advancing their skills and expertise through hands-on experience by offering a *one-year* complimentary **Sage Business Cloud Accounting** ('Accounting') subscription.

Objectives

- Help you gain a competitive edge with industry-recognized skills
- Get hands-on experience in classroom lessons
- Understand accounting principles brought to life in **Sage Business Cloud Accounting**

Learning Outcomes:

- Gain an overview of **Sage Business Cloud Accounting**
- Understand different **Accounting** subscription types
- Understand the benefits of cloud **Accounting**
- Gain an overview of **Accounting** security in the cloud
- Understand system requirements for using **Accounting**
- Understand the **Sage Education Alliance Program** partnership offering for students
- Learn how to apply for a complimentary EAP student **Accounting** Account
- Learn how to set-up a new demo **Accounting** student account for use throughout your course
- Learn how to accept an instructor's invitation to collaborate with you in **Accounting**
- Understand how to return to **Accounting**

Sage Business Cloud Accounting - About

The software is referred to as both **Sage Business Cloud Accounting** and **Accounting**. We will use **Accounting** when referring to the software throughout this course,.

Accounting is the essential cloud accounting and payroll solution which has helped small businesses reach their aspirations for over three decades. It's simple, efficient, and easier than spreadsheets, making accounting a breeze. This allows business owners to focus on what they love: building their businesses. Over 3 million entrepreneurs use **Accounting** to run and build their companies of all sizes around the world. The **Accounting** mobile app helps complete daily to-dos, nail numbers and run businesses like pros on the go.

For all business owners to run a business successfully, they'll need to know exactly where they stand financially, how much money they are making and how much money is being spent. **Accounting** eliminates complex calculations, manual tasks, and monotonous spreadsheets by organizing accounting data into one central accounting system in the cloud. This enables business owners to know where they stand at all times empowering them to make important financial decisions.

Some key **Accounting** features include invoicing, expense management, payroll, inventory, taxes, user management and customized reports.

Accounting is cloud-based software which means you can access student's data via the Internet anytime. It is automatically updated in the cloud therefore data files don't need to be backed up to a computer or server. Software will never have to be reinstalled due to a system crash or due to the purchase of a new computer. Data is not stored on your local computer hard drive.

Subscriptions

Sage offers subscription-based accounting software suitable for most business types in a variety of industries. As a business grows and needs more robust features, it can take advantage of dozens of add-on applications, or apps, available in the **Sage Marketplace**.

There are three types of subscriptions: **Accounting Start**, **Accounting** and **Accounting Partner Edition**. For purposes of this course, we will be using **Accounting**.

- **Accounting Start** is for smaller businesses that are primarily cash-based. As a business needs more features, a subscriber can easily upgrade to **Accounting** without losing data.
- **Accounting** is more robust, for businesses that need recurring statements, automatic bank feeds, inventory, payroll, budgets, and user management functionality. Students will be using a 12-month complimentary subscription throughout the duration of this course.
- **Accounting - Partner Edition** – Same as **Accounting** but enabled functionality to access and manage clients' books (student files) and collaborate with students. Instructors will be utilizing a complimentary subscription of **Partner Edition** throughout this course.

Accounting Benefits

- Accessibility - anywhere, anytime access using an Internet connection.
- Unlimited Student Access – using **Accounting** you can manage assignments from your instructor from your PC or on your mobile device, in real time. There is no need to back up data, no need to install software or migrate data if you purchase a new computer as it's all stored securely in the cloud. You have limitless opportunities to work with your instructor online to perform assignments in a simplified manner.
- Easy Data Import – import data into **Accounting** automatically from a .CSV or Excel file
- Automation – Automate routine tasks to simplify admin and bookkeeping tasks
- Mobile – Students aren't tied to their desktop, they can perform assignments and access **Accounting** from any mobile device when and wherever they are.
- No Desktop files – no installation, upgrades or backups are required. It's all in the cloud.

Access/Security






You can access **Accounting** directly from your web browser 24 hours/day, 7 days/week, where it's hosted in the cloud and backed-up automatically. With

bank-level security and no need for manual backups, **Accounting** is safe, secure, trusted, and peace of mind comes standard. Sage uses advanced, industry-recognized security safeguards to keep all of your accounting data secure, private, and protected. You can securely access and manage your data from your computer, laptop, tablet, or smartphone anytime you choose. There is no software to install, and no delays for software releases or roll backs.

System Requirements

Accessing Accounting

Accounting is designed for use on desktop and tablet devices, with a high-speed Internet connection with the latest version of most browsers:

-  Google Chrome- <https://www.google.com/intl/en/chrome/>
-  Mozilla Firefox- <https://www.mozilla.org/en-US/firefox/new/>
-  Microsoft Edge - <https://www.microsoft.com/en-us/windows/microsoft-edge>
-  Internet Explorer- <https://support.microsoft.com/en-us/help/17621/internet-explorer-downloads>
-  Apple Safari - <https://www.apple.com/safari/>

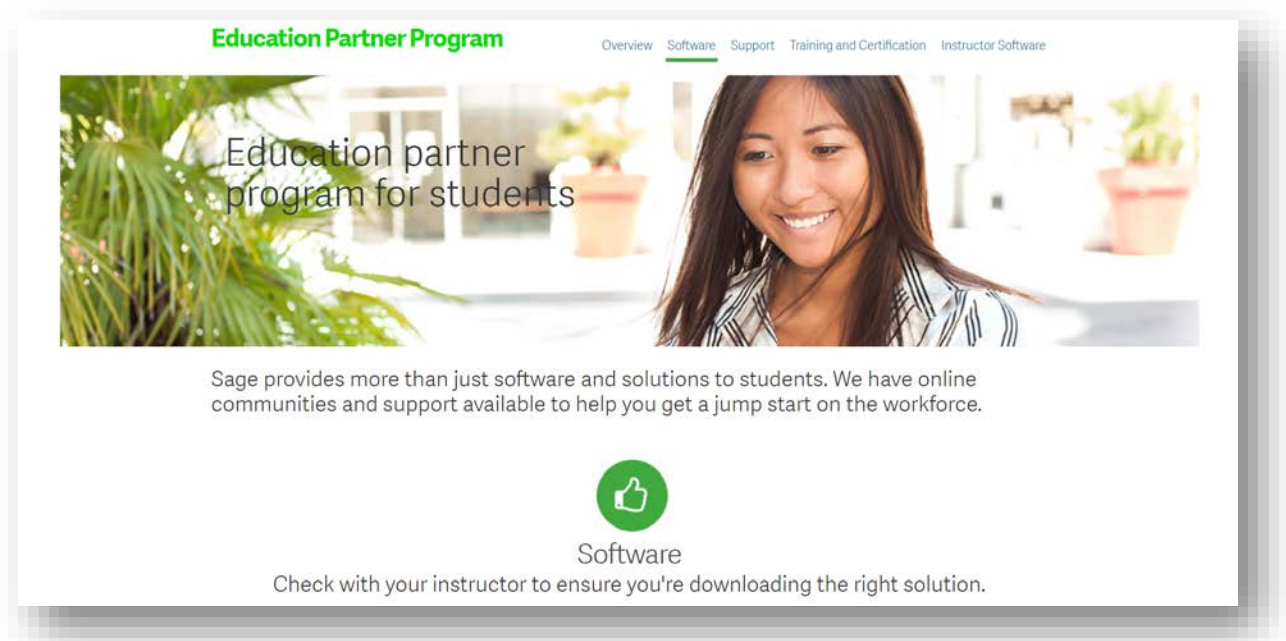
EAP Accounting Offering by Sage

Students must register with the EAP program. Once approved, they are granted a 12-month *complimentary* end-user account of **Accounting** and are to be used solely by each student assigned to the account.

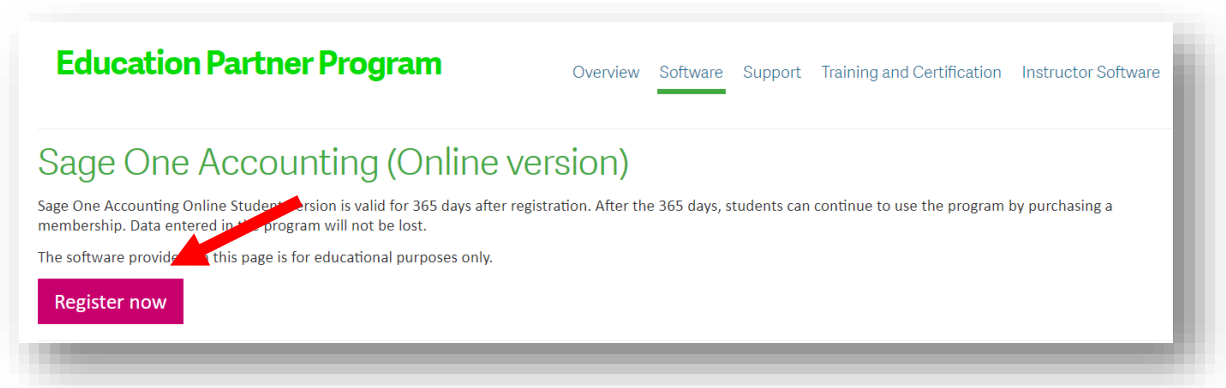
Apply for EAP Student Account

1. To apply for a complimentary student membership account with the **Sage Education Alliance Program**, go to the *Education Partner Program* page and click on the link below:

<http://na.sage.com/ca/about-us/education>



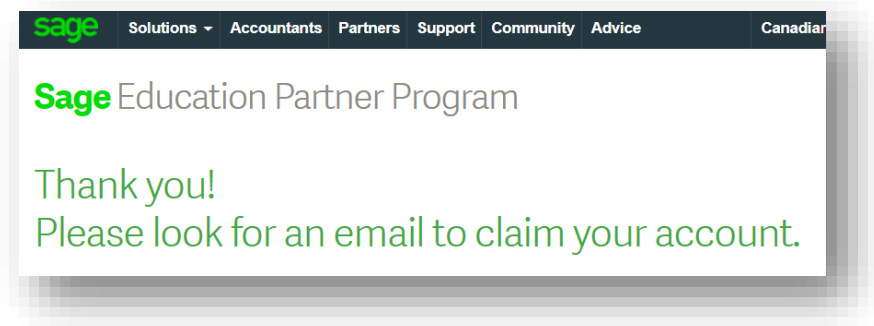
2. Scroll down to **Sage One Accounting (Online Version)**
3. Click **'Register Now'**:



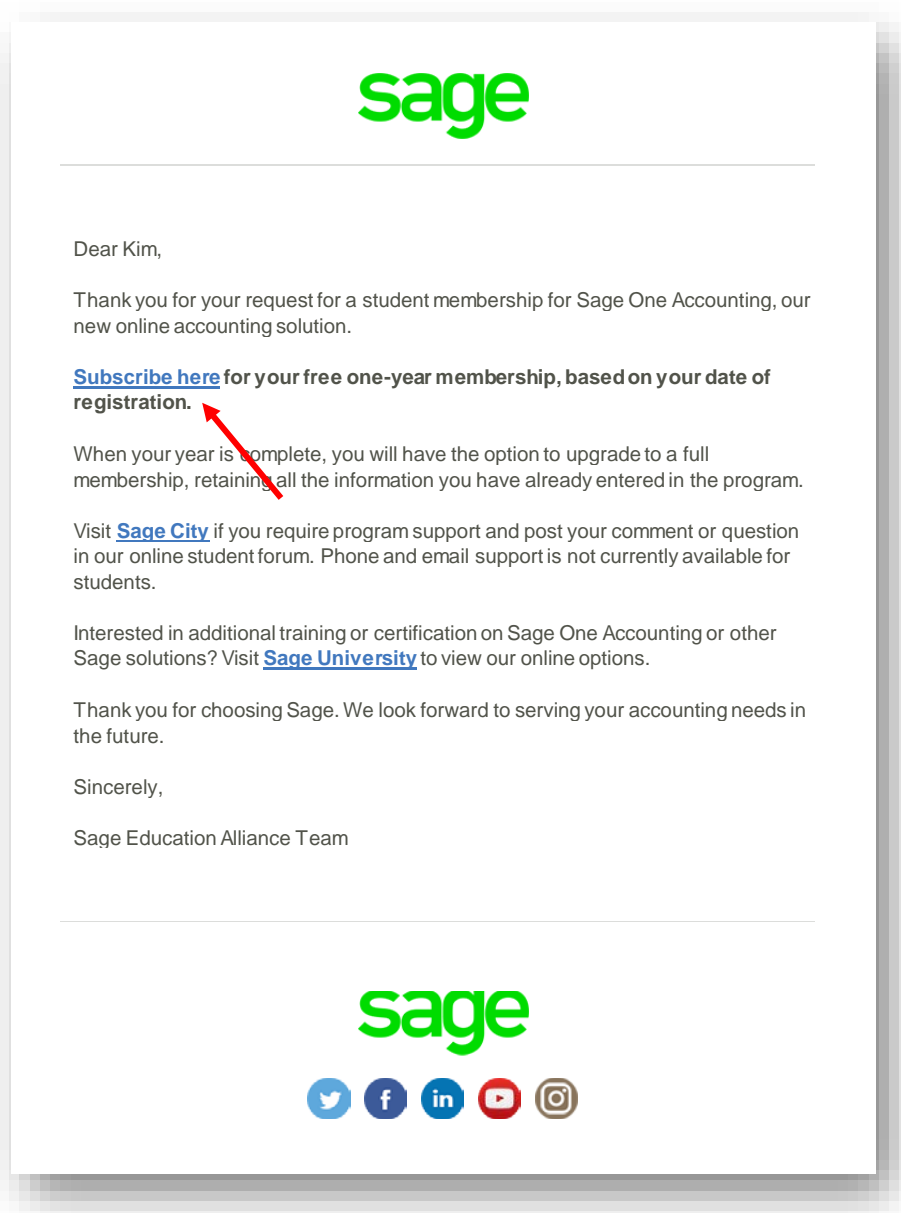
4. Fill in all pertinent information including **school**, the **course you are studying**, **course completion date** and **plans upon graduation**:

The screenshot shows a registration form titled "Sage Education Partner Program" with the heading "Register for student activation codes". The form contains several input fields: "First name", "Last name", "Email", "School name", "Phone", "Type of school" (a dropdown menu with "Please Select..." as the current selection), "Course Studying", "Course completion date", and "Plans upon graduation". At the bottom, there is a checkbox for a certification statement and a "Submit" button.

5. You'll receive an acknowledgment from the **Sage Education Partner Program** where you'll be directed to your email to confirm your account:



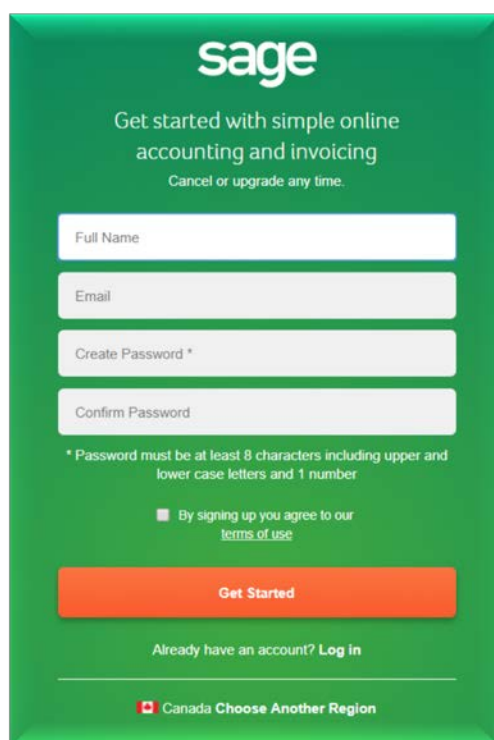
6. After receiving the email, **click** the "**Subscribe Here**" link to access your new **Accounting** student account:



7. **Accounting** will launch the sign-up window. Begin by filling in your **Full Name**.
8. Enter an **email** account your instructor can use to collaborate with you in **Accounting** throughout the duration of the course.
9. Create a **Password**
10. Read the '**terms of use**' and **check the box** if you agree.



NOTE: As a reminder, this is a complimentary 365-day trial account for students. You will not be asked for, nor required to input billing information.



sage

Get started with simple online accounting and invoicing
Cancel or upgrade any time.

Full Name

Email

Create Password *


Confirm Password

* Password must be at least 8 characters including upper and lower case letters and 1 number

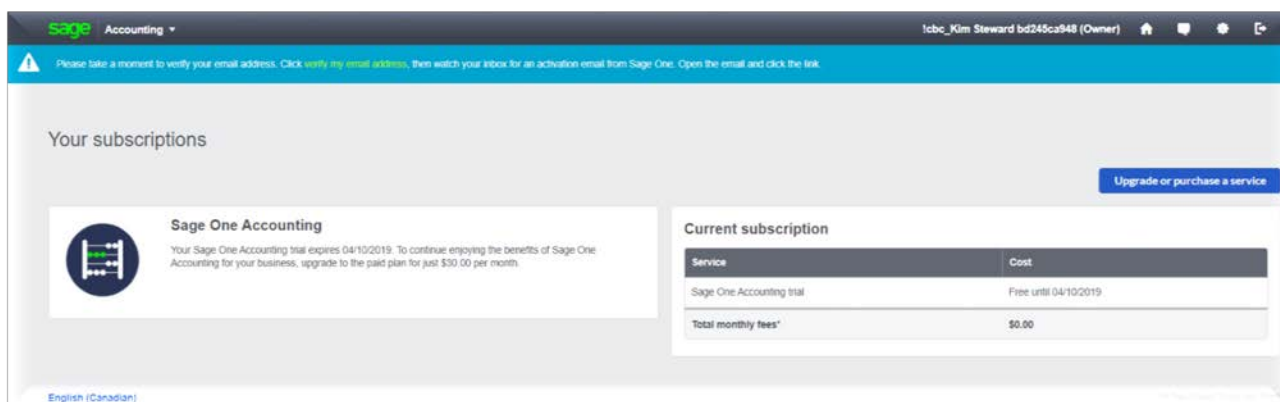
By signing up you agree to our [terms of use](#)

Get Started

Already have an account? [Log In](#)

 Canada [Choose Another Region](#)

11. Click the '**Get Started**' tab which will take you to the **Accounting** subscription page:



sage Accounting | Icbc_Kim Steward bd245ca948 (Owner)

Please take a moment to verify your email address. Click [verify my email address](#), then watch your inbox for an activation email from Sage One. Open the email and click the link.

Your subscriptions

[Upgrade or purchase a service](#)

Sage One Accounting
Your Sage One Accounting trial expires 04/10/2019. To continue enjoying the benefits of Sage One Accounting for your business, upgrade to the paid plan for just \$30.00 per month.

Current subscription

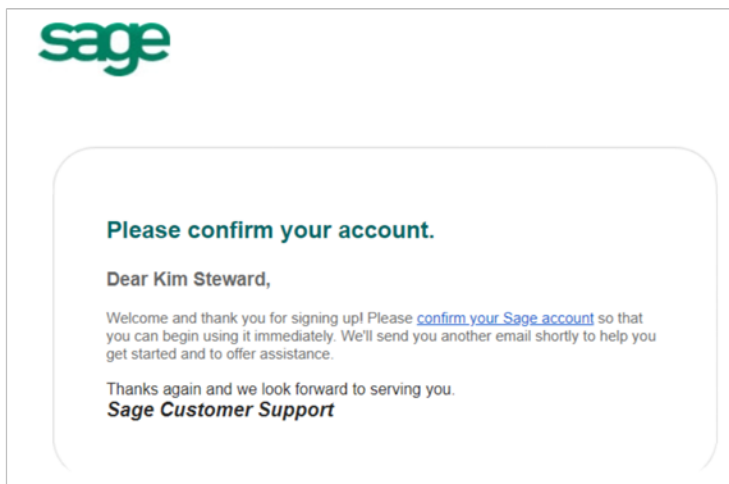
Service	Cost
Sage One Accounting trial	Free until 04/10/2019
Total monthly fees*	\$0.00

English (Canadian)

12. Before continuing you'll need to confirm the email address used to register your account. Otherwise, you'll receive the following error message:

i Before you can proceed, you need to verify the email address you used to sign up for Sage One Accounting. Please click [verify my email address](#), then watch your inbox for an activation email from Sage One. Open the email and click the link.

13. Navigate to your email and look for the confirmation email from Sage:



Once confirmed, you'll be navigated to the Set-Up Wizard within **Accounting** to set up your demo account to use throughout the duration of this course

Set-Up a new demo Account

1. Once registration is complete, you'll be navigated to the set-up wizard to begin populating your demo company account for use throughout your **Accounting** course. Enter a fictitious **Business Name** and the **Type of Business** you'll be running, Sole Proprietor, Partnership, Corporation, Co-operative, or Other.

The image shows the first step of a three-step wizard titled "Let's set up your business". The sub-header says "Step 1 of 3" and "Just a few quick questions, and you're ready to go!". There is a text input field for "Business Name**" containing "Kim's Cookies" and a note "This will appear on your customer invoices." Below this is a "Type of Business**" section with radio button options: "Sole Proprietorship - I work for myself*", "Partnership - it's me and my business partner(s)*", "Corporation - tax is paid by the corporation*", "Co-operative - owned by an association of members*", and "Other - we have a special company type*". A red "Save and Continue" button is at the bottom.

14. Click **Save and Continue**.

15. Next, enter a fictitious address for your new company. This address will show on all invoices, statements, and credit notes you send to customers as well as reports. The **Province** chosen here will calculate the correct tax rates based on the area you're doing business in. This ensures you're always compliant and aren't caught off guard at the end of the financial year. Click **Save and Continue**.

Step 2 of 3

Let's set up your business

Where do you run your business from day-to-day?

Business Trading Address

Address 1** 100 Student Way

Address 2

Town / City** Toronto

Province Ontario

Postal code** M4C1B5

Telephone** 4749302049

Save and Continue

17. If you will collect sales tax, click **Collect** and enter a fictitious sales tax number. This number is generated from the local tax authority, like the Canada Revenue Agency, when registering a business for the first time. If you are doing business in a Province that collects GST/QST or PST sales tax, that would be displayed along with the applicable sales tax percentage, below. In my example, because I created a business located in Ontario, only HST tax rates are being displayed.

Step 3 of 3

Let's set up your business

And finally, do you charge Sales Tax?

Sales Tax

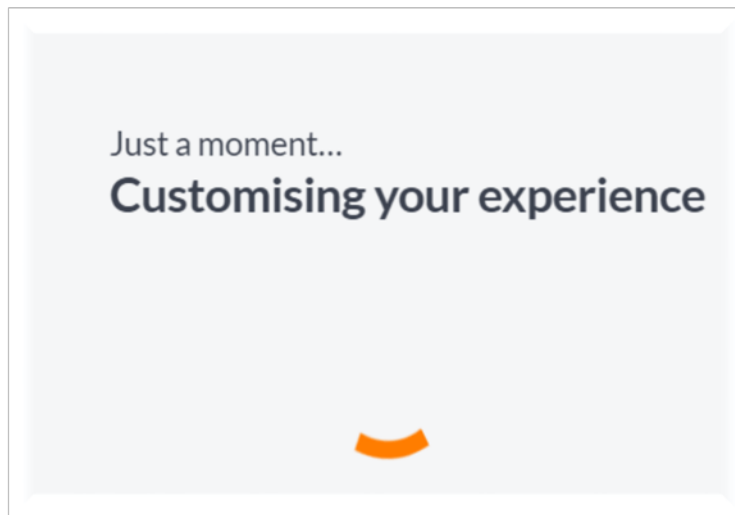
Collect I collect HST
 I don't collect any tax

HST Number* 123456789 RT 1234

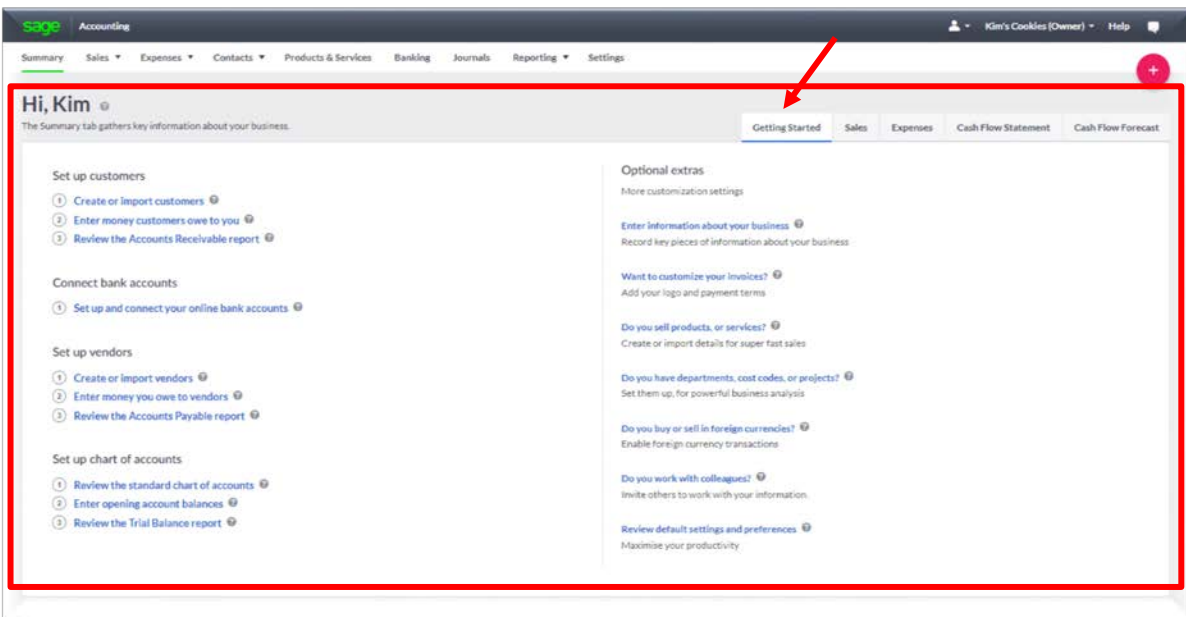
Tax rates for Ontario	
HST	13.00 %
HST	5.00 %

All Done!

18. Click **All Done! Accounting** will generate your chart of accounts and other default information:



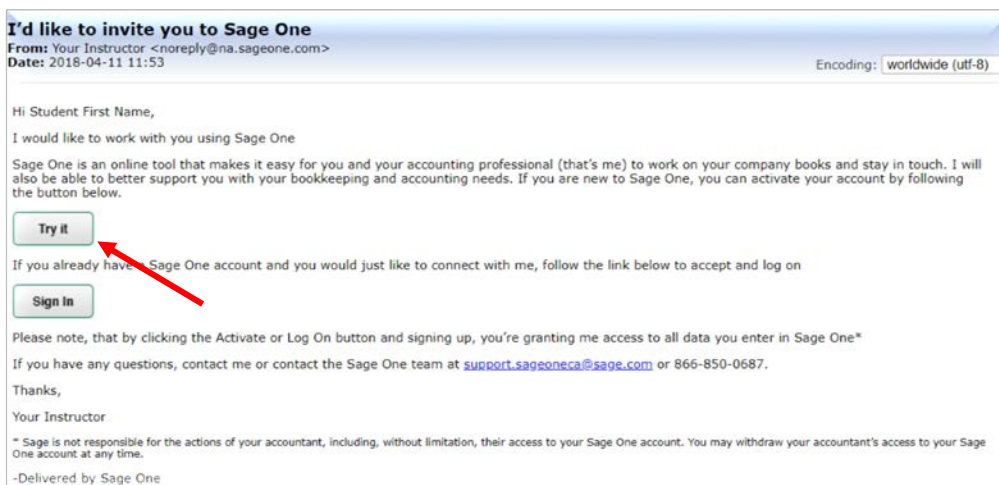
19. You'll be taken into the **Getting Started** dashboard where you're **Accounting** adventure begins!



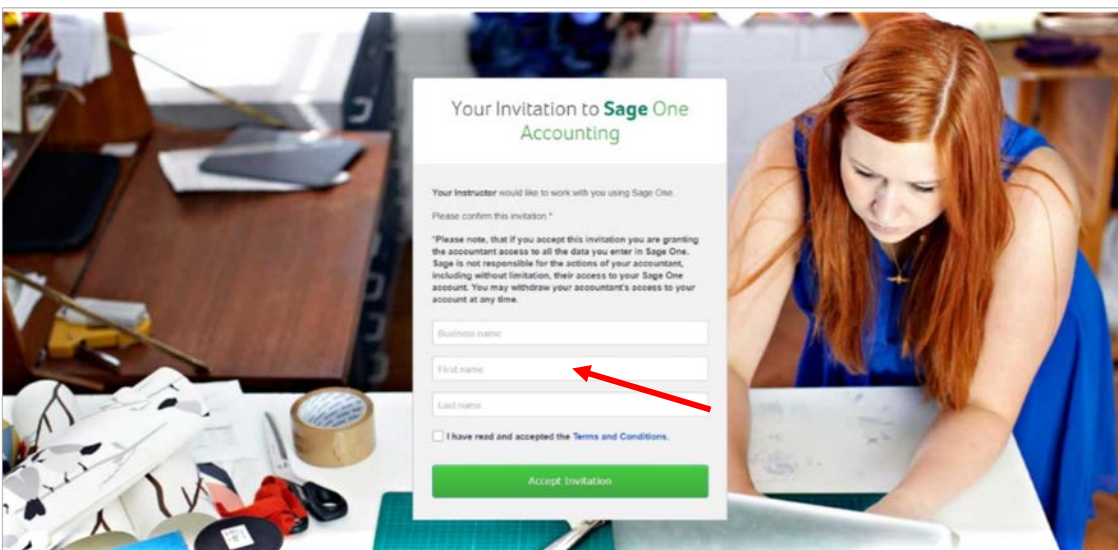
Accepting an Instructors Invitation to Collaborate in Accounting

One of the key features of **Accounting** is the ability for Accountants and Instructors to collaborate with you during your course. This enables them to manage student accounts/data, create assignments and access student files directly from their login using the **Accounting – Partner Edition**. To do this, your instructor will need to send you an invitation via email and you as the student will need to accept. The email will look like the one below.

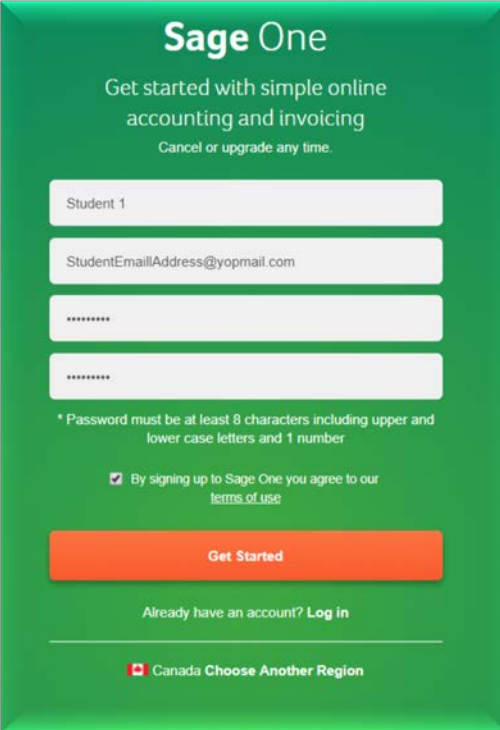
1. Click **Try It**.



- You'll be navigated to the sign-up screen where you'll be asked to create a **Business Name, First and Last name**. Accept the terms and click **Accept Invitation**.



- Create a **password**, accept the **terms** with a check mark in the box and click **Get Started!**



Sage One

Get started with simple online accounting and invoicing
Cancel or upgrade any time.

Student 1


StudentEmailAddress@yopmail.com

* Password must be at least 8 characters including upper and lower case letters and 1 number

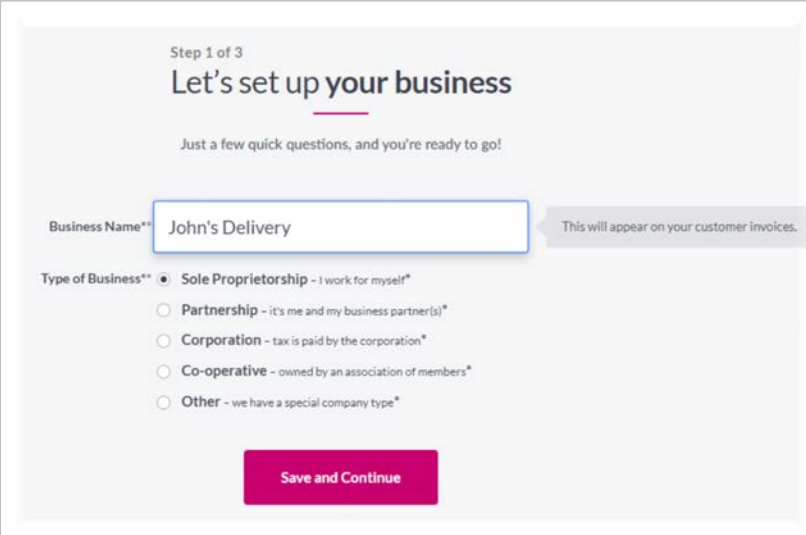
By signing up to Sage One you agree to our [terms of use](#)

Get Started

Already have an account? [Log in](#)

 Canada [Choose Another Region](#)

- As with the previous setup you just learned above, the setup wizard will launch. Enter a fictitious **Business Name** and the **Type of Business** you'll be running throughout the duration of your course, **Sole Proprietor, Partnership, Corporation, Co-operative, or Other**.



Step 1 of 3

Let's set up your business

Just a few quick questions, and you're ready to go!

Business Name** This will appear on your customer invoices.

Type of Business**

- Sole Proprietorship** - I work for myself*
- Partnership** - it's me and my business partner(s)*
- Corporation** - tax is paid by the corporation*
- Co-operative** - owned by an association of members*
- Other** - we have a special company type*

Save and Continue

- Click **Save and Continue**.
- Next, enter a fictitious **address** for your new company. This address will

show on all invoices you send to customers. Additionally, the **Province** chosen here will calculate the correct tax rates based on the area you're doing business in. This ensures you're always compliant and aren't caught off guard at the end of your financial year. Click **Save and Continue**.

Step 2 of 3

Let's set up your business

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Town / City** Toronto

Province Ontario

Postal code** M4C1B5

Telephone** 4749302049

Save and Continue

- a. If you will collect sales tax, click **Collect** and enter a fictitious sales tax number. This number is generated from the local tax authority, like the Canada Revenue Agency, when registering a business for the first time. If you were doing business in a province that collects GST/QST or PST sales tax, that would be displayed along with the applicable sales tax percentage, below. Because I created a business located in Ontario, only HST tax rates are being displayed.

Step 3 of 3

Let's set up your business

And finally, do you charge Sales Tax?

Sales Tax

Collect I collect HST I don't collect any tax

HST Number* 239483098 RT 0980

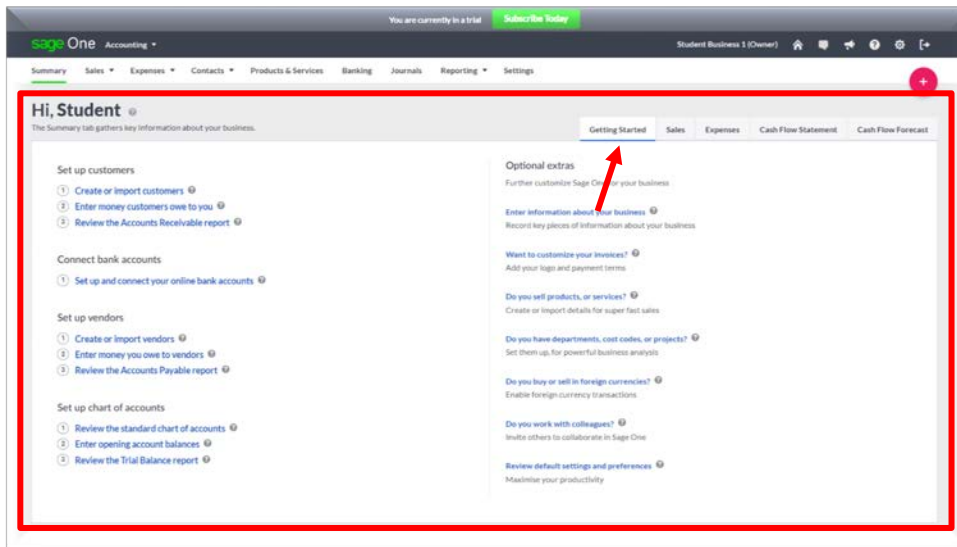
Issued by Canada Revenue Agency when you registered for HST. It has 13 numbers, and can often be found on correspondence from the tax office. We'll put it on your invoices automatically.

Tax rates for Ontario

HST	13.00 %
HST	5.00 %

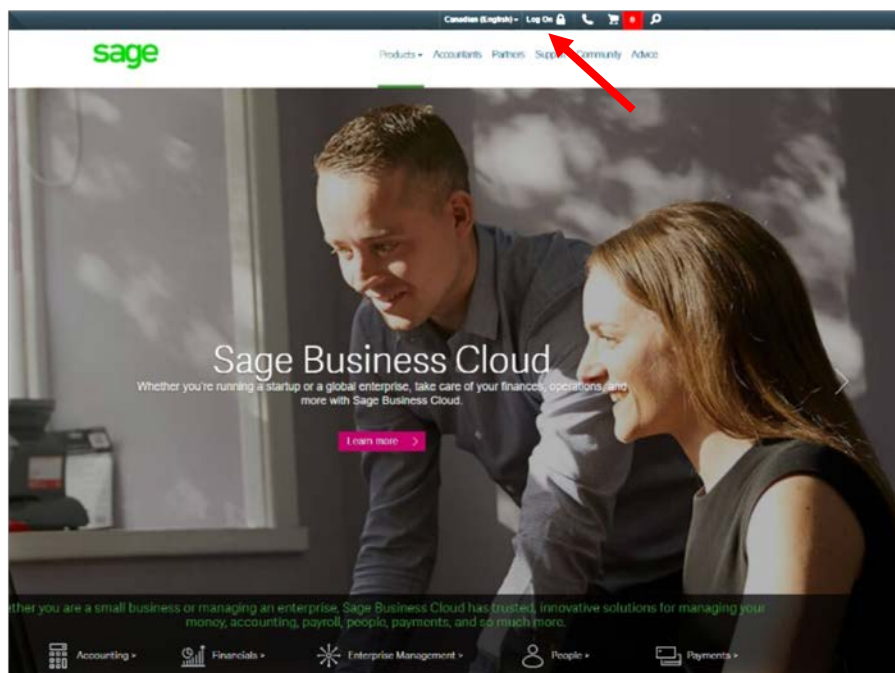
All Done!

19. Click **All Done!** Once the setup wizard is complete, **Accounting** will generate your chart of accounts and other default information. You'll be taken into the **Getting Started** dashboard where you're **Accounting** adventure begins!

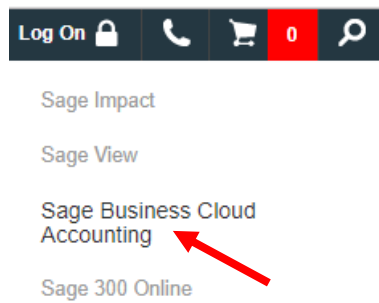


Returning to Accounting/Sign In

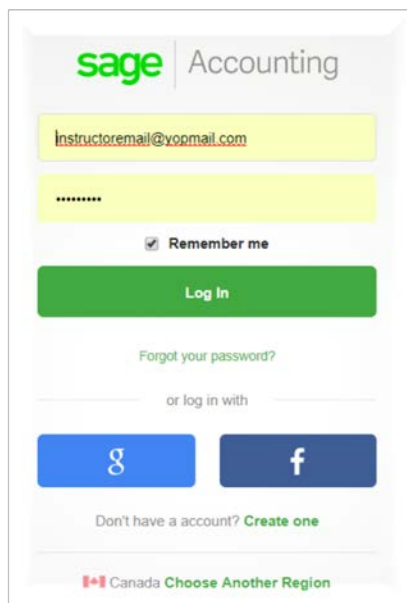
The next time you sign into **Accounting** navigate to: <https://www.sage.com/ca/>



1. Click **Log On** and select **Sage Business Cloud Accounting** from the drop-down menu:



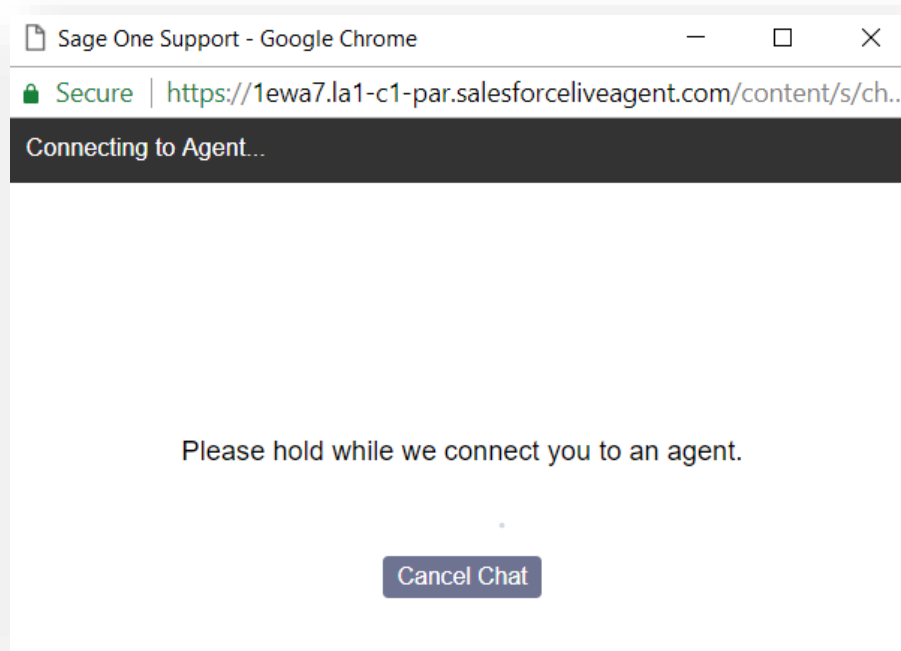
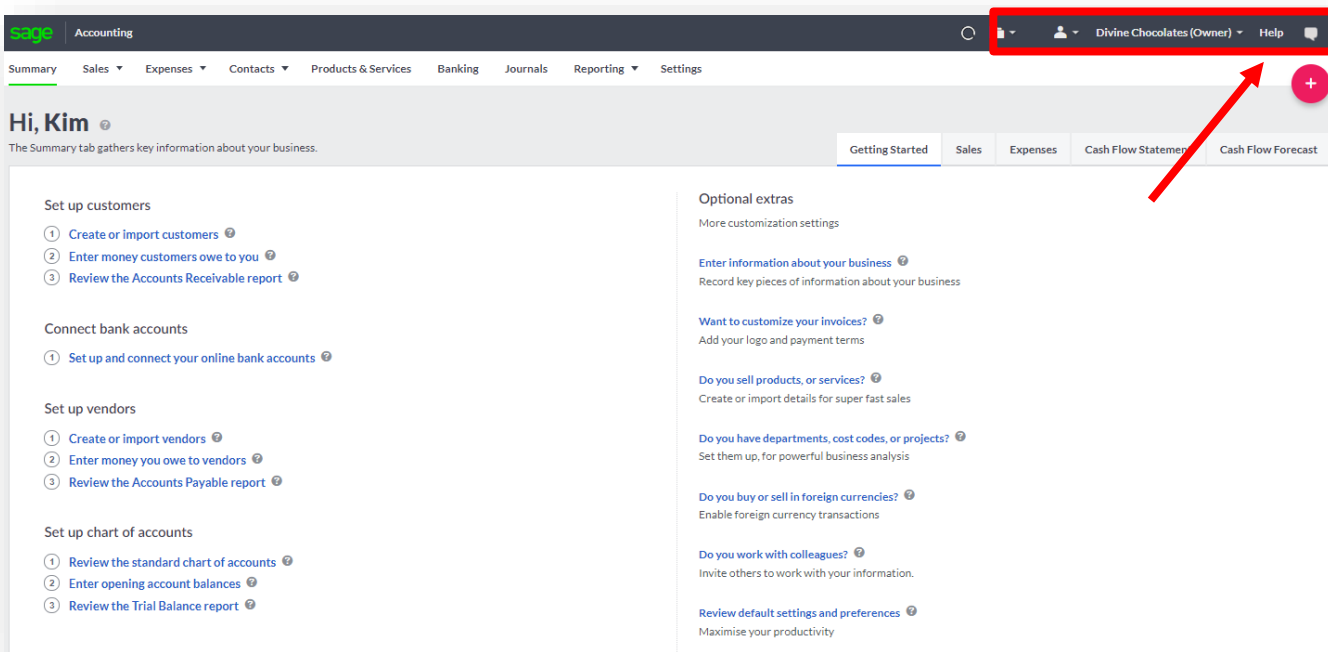
2. Enter your student **User ID** and **Password** used when registering:

A screenshot of the Sage Accounting login page. At the top, the Sage logo is followed by the word 'Accounting'. Below this is a text input field containing the email address 'instructoremail@vopmail.com'. Underneath is a password input field with masked characters '*****'. A checkbox labeled 'Remember me' is checked. A green 'Log in' button is positioned below the password field. Below the button, there is a link for 'Forgot your password?'. Further down, the text 'or log in with' is followed by two social media login buttons for Google and Facebook. At the bottom, there is a link that says 'Don't have an account? Create one'. At the very bottom, there is a small Canadian flag icon followed by the text 'Canada Choose Another Region'.

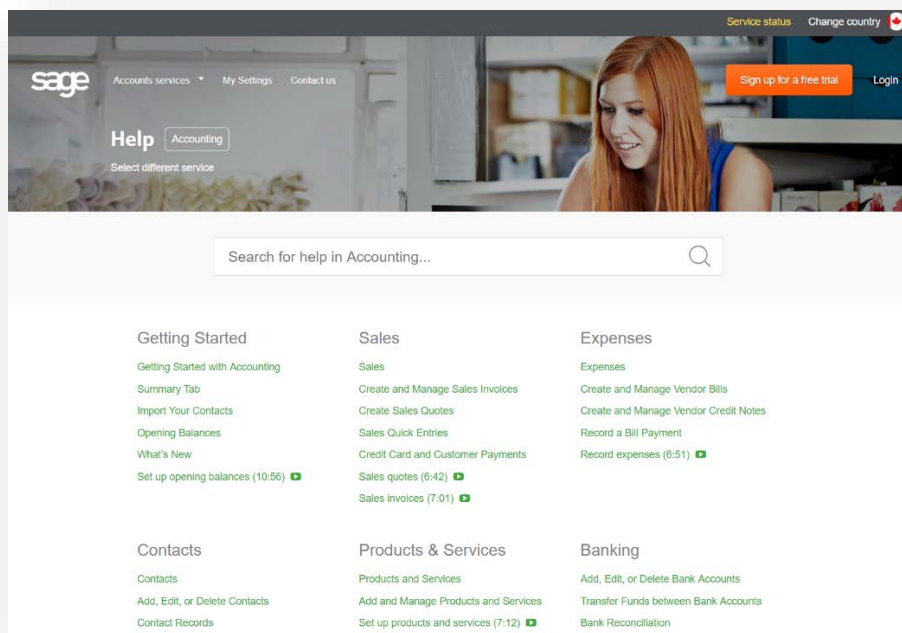
3. Click **Log In**.

Technical Assistance

To obtain help when signed into **Accounting**, navigate to the menu bar and click on the chat icon to chat with a live support representative, Monday – Friday 9:00 a.m. – 6:00 PM EST. Please note, tech support is unable to assist students with test questions



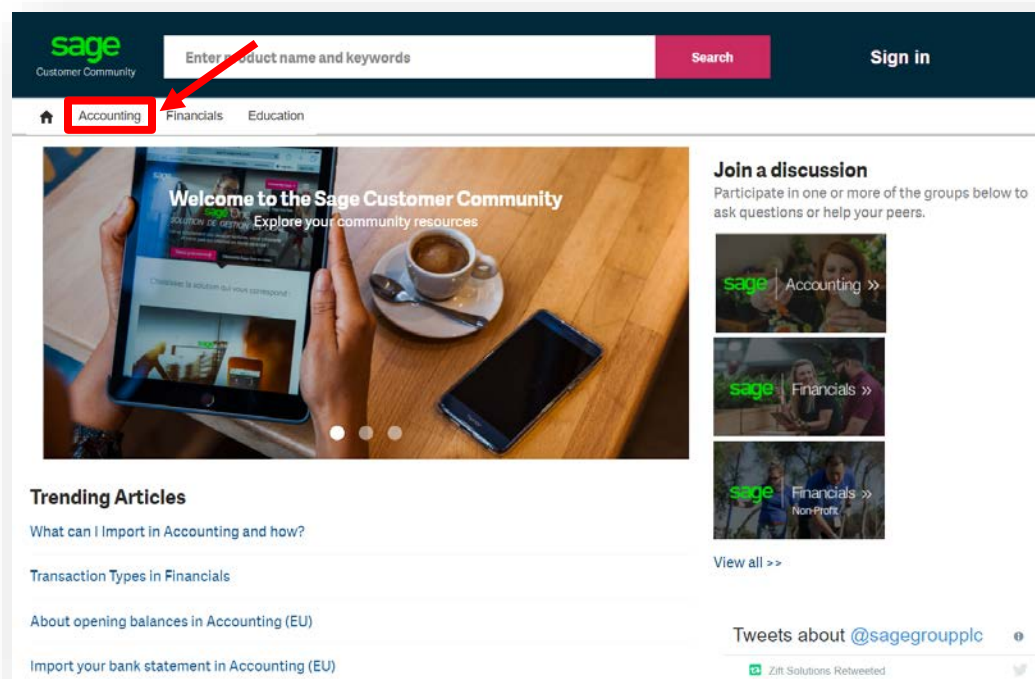
Click on the **Help** icon next to the **Chat** icon to access support articles and how-to videos:



Sage Customer Community

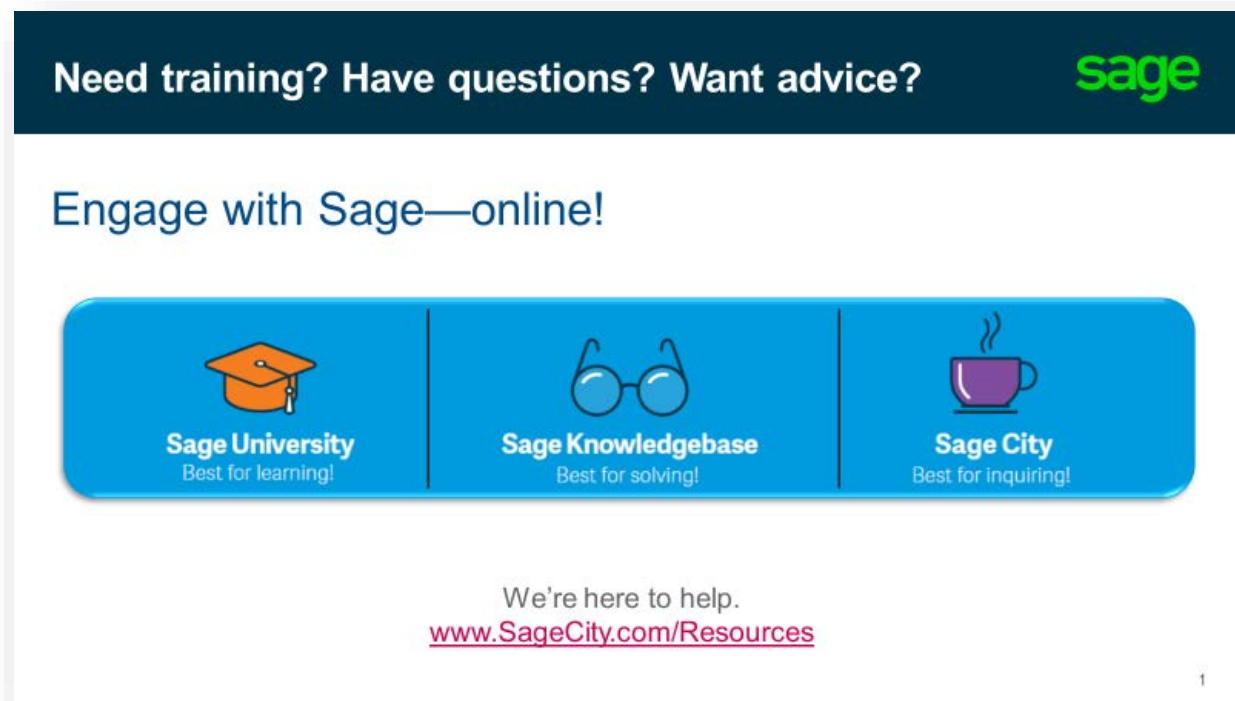
For additional help/articles/forums etc. select **Accounting**:

https://customers.sage.com/s/?language=en_US






Beyond the Classroom

Your continued success is important to us. Sage has the following additional resources for you to continue your learning.



Need training? Have questions? Want advice? **sage**

Engage with Sage—online!

 Sage University Best for learning!	 Sage Knowledgebase Best for solving!	 Sage City Best for inquiring!
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We're here to help.
www.SageCity.com/Resources

1

Certification Assessments

Research has shown that in today's economy it is more important than ever for individuals to obtain solid technical skills and certified proof of their knowledge to secure the best job opportunities. Certification is becoming a requirement for many and the demand for certified professionals has dramatically increased. Sage certification assures proof of your expertise.

Once you have completed a Sage training course, we would therefore encourage you to take the Sage competency assessment. Assessments are offered in English and in an online environment.

Visit www.sageu.com to take your assessment.

Best for learning . . . Sage University

What is Sage University:

- Extensive library of on-demand learning topics and instructor-led classes

Who can attend:

- Anyone can attend Sage U.

Benefits to you, our partners:

- Sage U is a great way to ensure you are up on how to utilize the latest software features as well as keep your partner certification active.

Benefits to your customers:

- Customers who know the ins and outs of their software are more likely to stick with it—ongoing training is a great way to help them master their solution.



Attending is easy:

- Visit: www.SageU.com
- Click **Accounting**
- Choose Sage solution

2

Best for solving . . . Sage Knowledgebase

What is Sage Knowledgebase:

- Home to thousands of articles written by Sage support analysts

Who can access:

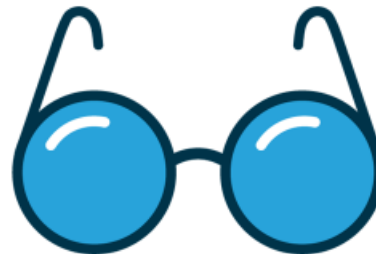
- Anyone can access the content.

Benefits to you, our partners:

- Even experts like you need help sometimes! When you need to find answers fast, search Sage Knowledgebase—which is updated by analysts daily.

Benefits to your customers:

- After hours technical questions can be frustrating for customers...let them know about Sage Knowledgebase to find answers when you aren't readily available.



Accessing is easy:

- Visit: support.na.sage.com
- Type in search criteria
- Click Accounting icon

3



End of Lesson – This completes this lesson. Please proceed to **Module 2 – Introduction to Bookkeeping.**

Please note:

Every effort has been made to ensure that the information provided in this educational series is accurate, up-to-date, and complete, but no guarantee is made to that effect. URLs and additional resources 'Beyond the Classroom' are continuously changing. Because the software is customizable in a number of ways, the language used in this guide may be different from what you 'see' when you work with your company's data file(s).

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