

Sage Business Cloud Accounting: Instructor 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 complimentary **Sage Business Cloud Accounting ('Accounting')** subscription.

Objectives:

- Teach the subject of accounting by creating an engaging and simplified learning experience through use of **Sage Business Cloud Accounting**
- Through a series of practical application and coursework, help students develop mastery of **Accounting** enabling job-ready, real-world skills needed to be successful both at school and within the work force.
- Demonstrate the key concepts of accounting by utilizing a simple case study in a systematic progression of exercises to bring clarity to challenging topics.
- Help students gain a competitive edge with industry-recognized skills
- Bring accounting principles to life in **Sage Business Cloud Accounting** while offering hands-on experience in classroom lessons

Learning Outcomes:

- Gain an overview of **Sage Business Cloud Accounting**
- Understand different subscription types
- Understand the benefits of cloud **Accounting** for use within the classroom
- Understand how to access **Accounting**
- Gain an overview of **Accounting** security in the cloud
- Understand system requirements for using **Accounting**
- Understand the **Education Alliance Program** partnership offering
- Learn how to apply for a complimentary instructor **Accounting – Partner Edition** Account
- Learn how to setup a new instructor **Accounting** company/demo account for use throughout your course
- Understand difference in landing page for students vs. instructors
- Navigate **Accounting - Partner Edition**
- Invite students to collaborate with you using **Accounting**
- Set up a student company file
- Navigate back and forth between student accounts

Sage Business Cloud Accounting - About

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

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 users complete daily to-dos, nail their numbers and run their 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 Educator Access – using Accounting - Partner Edition you can manage all your student company files in one location with a single sign on, giving you access to real time data
- No Student Cap – Add an unlimited number of students to collaborate with you
- Easy Data Import – Import list 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

Accounting can be accessed directly from a 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 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/>



NOTE: We suggest students and instructors work from the same browser to have the best experience.

EAP Accounting Offering by Sage

Instructors: As an educator you have unlimited use of a complimentary account of **Accounting - Partner Edition** to collaborate with students throughout the duration of your course.

Students: Students are granted a 12-month complimentary end-user account of **Accounting**. There are *different* links for instructors and students to sign up which are provided below.

Apply for EAP Instructor Account

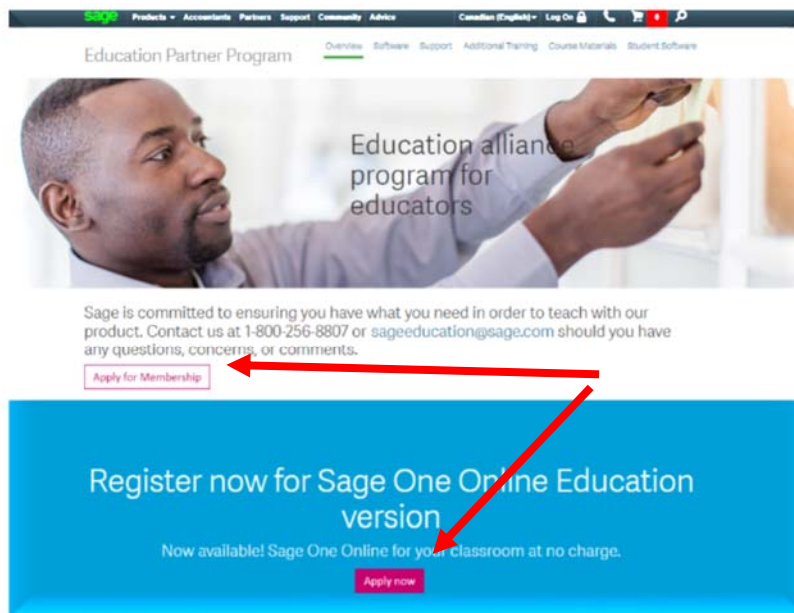
1. To apply for a complimentary Instructor membership account with the **Sage Education Alliance Program**, go to the *Education Partner Program* page and click on the link below:



NOTE: This link is for *instructors only*. Please do not share this link with students. There is a different link for student registration/sign up.

Go to: <https://www.sage.com/ca/about-us/education-instructor>

- Click on **Apply for Membership** or **Apply now**.



- Fill in all pertinent information including **school**, the **course you are teaching, etc.** and select **Accounting** within the **Product Needed** drop down menu.

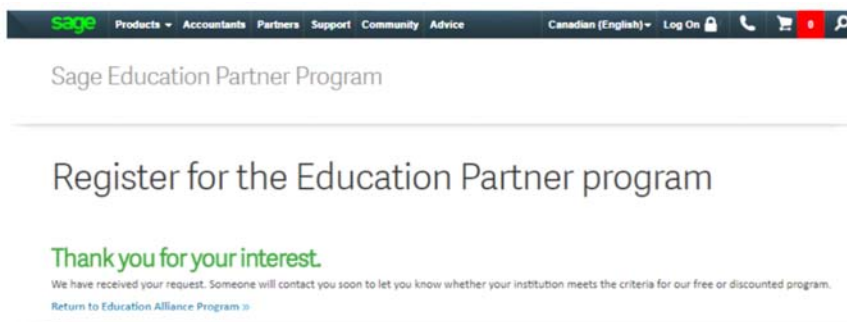
The screenshot shows the Sage Education Partner Program registration form. The form is titled "Register for the Education Partner program" and contains the following fields:

- Name of institution *
- Type of institution * (dropdown menu)
- If other, please specify
- Address *
- City *
- State or Province * (dropdown menu)
- ZIP or postal code *
- Country * (dropdown menu)
- Main office phone *
- Relationship with institution *
- Contact first name *
- Contact last name *
- Email *
- Faculty or department *
- Company *
- Phone *
- Product needed * (dropdown menu, highlighted with a red arrow)
- How did you hear about us * (dropdown menu)
- If other, please specify

At the bottom of the form, there are two checkboxes:

- I certify that I represent an educational institution (secondary school, college, university, vocational school) or a nonprofit training center and that the information regarding the educational institution is true and accurate.
- I certify that I will only use the resources supplied to me for educational purposes. I will not resell, distribute, or use the software or services for personal or commercial purposes.

4. You'll receive an acknowledgment from the **Sage EAP Education Partner Program** of your submission:



5. Navigate to your email and look for an email from Sage. **Click** where it says 'Your instructor membership can be accessed by clicking [here](#).'

Thank you for your request to join our Education Alliance Program for **Sage Business Cloud Accounting**. As part of this program you will receive a non-expiring membership to **Accounting's Partner Edition**. With this version, you will have the ability to invite your students to so that you can access their **Accounting** student account at any time to view their assignments.

We are offering some 1:1 phone training should you be interested in how to use the feature of inviting the students and anything else you may want to know. Please let me know if this would be of interest to you.

Along with your membership, your students can also receive a one-year membership to **Sage Business Cloud Accounting**. You simply need to provide them with the below **student** URL to register and they will receive an email with their links for the program.

Your instructor membership can be accessed by clicking [here](#)



Your students will also have access to a free one-year membership. They can access that by visiting <https://www.sage.com/ca/about-us/education/education-partner-program-student/> to register.

Training

As part of our education offerings, we also supply you with free online training and certification. All of this can be found by visiting [Sage U](#).

Teaching Materials

Attached you will find all the teaching materials that you will need to begin using **Accounting** in the classroom today. This will cover how to use **Accounting** along with some exercises for the students to complete.

Again, we would like to thank you for interest in the Sage Education program and should you have any questions, please do not hesitate to reach out by calling 1-800-256-8807 or email us at Sageeducation@sage.com

If you are unable to open the link within the email you may access it here:



The link provided within the instructor's email is for **instructors only**. Please **do not** distribute this link to students. Students have a **different** link to access **Accounting**.

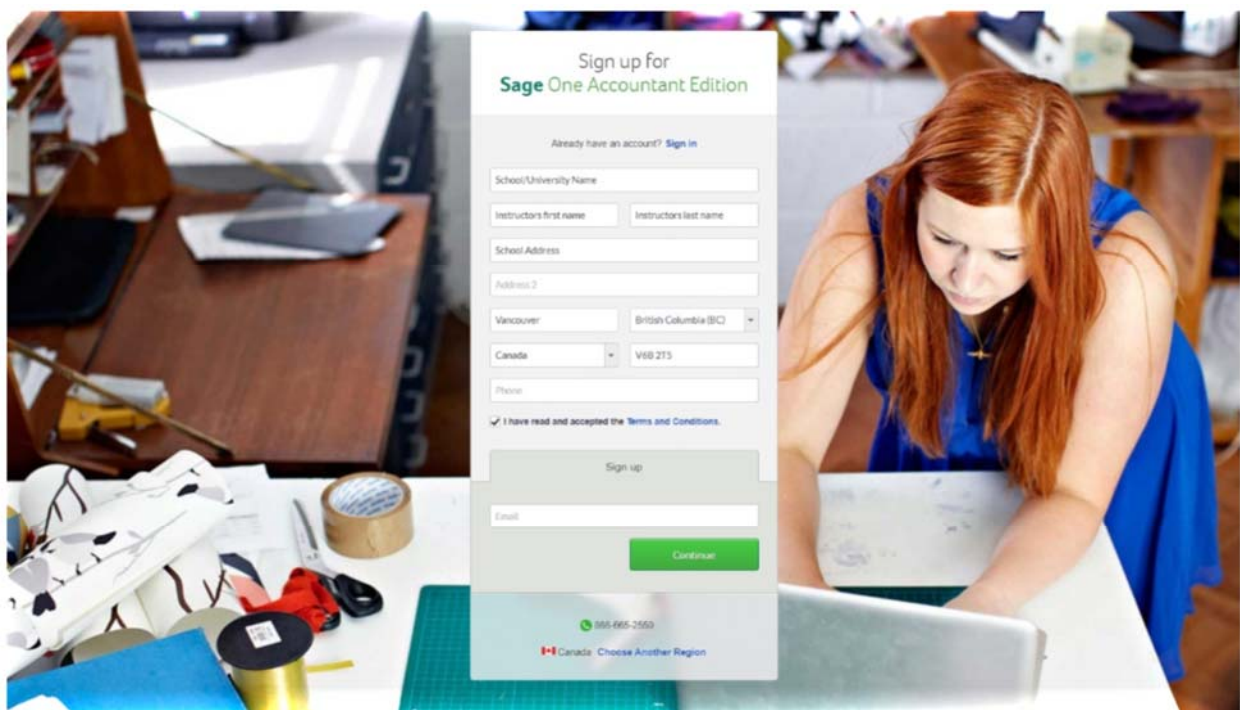
English

https://mysageone.ca.sageone.com/signup/new?product=accountant_edition&source=eapcdaedu

French

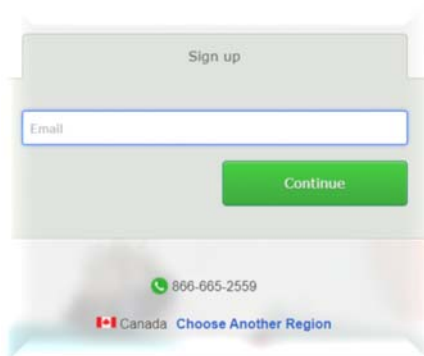
https://mysageone.ca.sageone.com/signup/new?product=accountant_edition&locale=fr&source=eapcdaedu

6. **Accounting** will launch the **Sign-Up** window. Begin by filling in a **Business Name** (your school) and your **First** and **Last Name**.
7. Enter the **address** and **phone** of your instructor account.



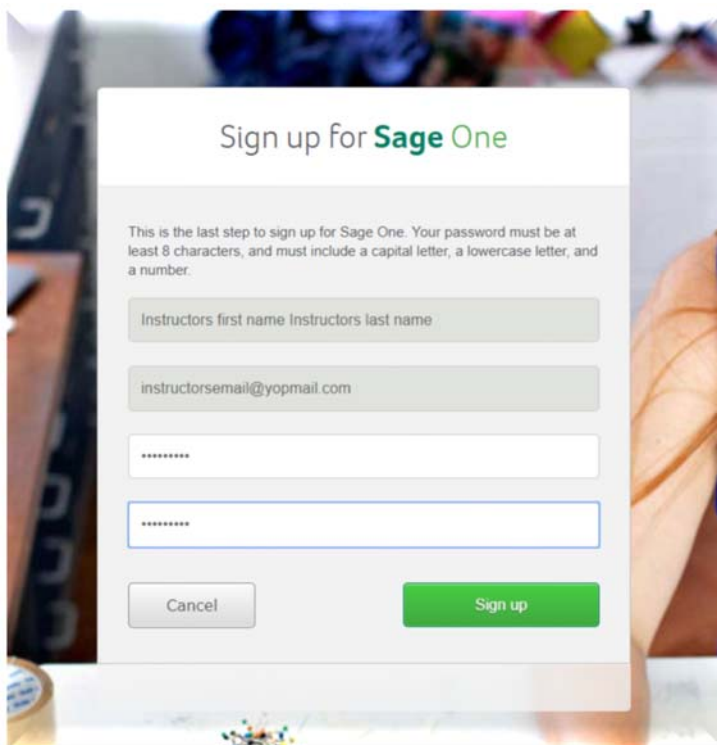
8. **Read the 'terms of use'** and **check the box** if you agree. *As a reminder, this is a complimentary account and no payment information will be requested or required.*
9. Click **Sign Up**.

10. Enter your email address and click **Continue**.



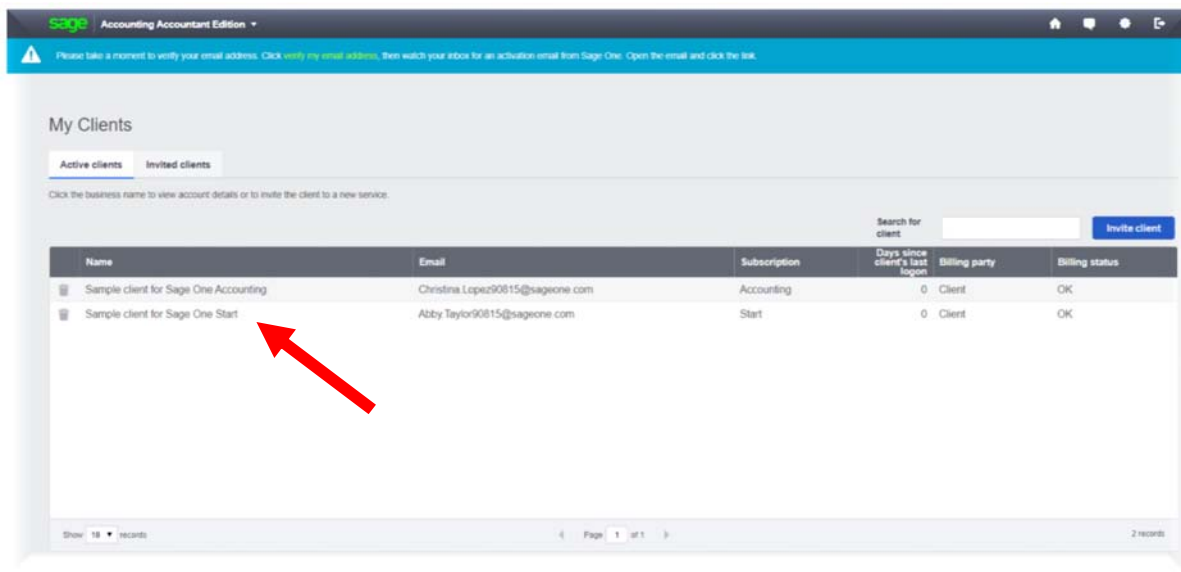
The screenshot shows a 'Sign up' form with a single input field labeled 'Email'. Below the field is a green 'Continue' button. At the bottom of the form, there is a phone icon followed by the number '866-665-2559' and a Canadian flag icon followed by the text 'Canada Choose Another Region'.

11. Enter a password and click **Sign Up**.



The screenshot shows a 'Sign up for Sage One' form. It includes a text box for 'Instructors first name Instructors last name', an email field with the placeholder 'instructorsemail@yopmail.com', and two password fields, both masked with asterisks. At the bottom, there are 'Cancel' and 'Sign up' buttons.

Once your **Accounting - Partner Edition** instructor account has been created, you will be taken to the Accountants dashboard where you'll have a list view of all student companies. You'll notice two sample companies for **Accounting** and **Start**. Sage Start is a different product so you are welcome to use the sample client info provided here for **Accounting** for practice.



12. Next, take a moment to verify your email address used to set up your account. A notification will appear at the top of the screen in the blue menu bar:

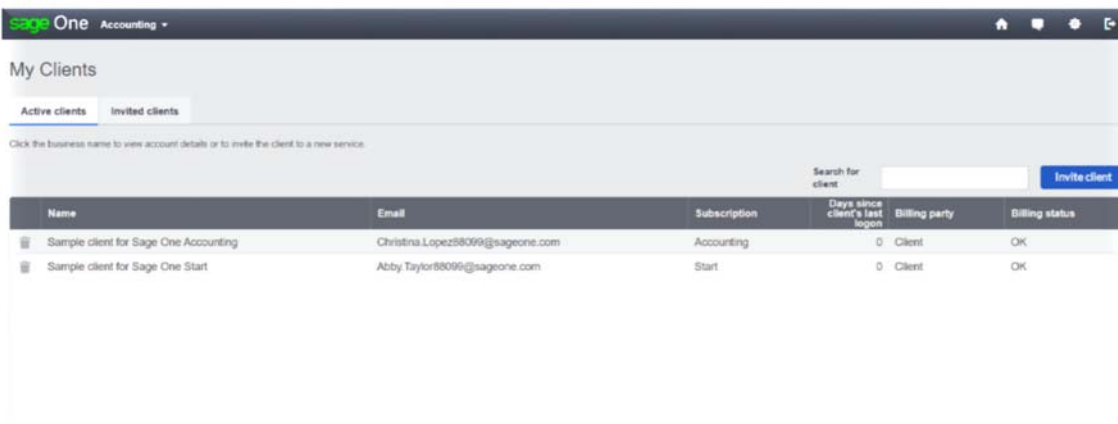


Student vs. Instructor Account types

Accounting - Partner Edition (instructor account) is designed to be simple and intuitive. It's used by Accountants around the globe to access company financials to collaborate with clients in real time. Once you've created your **Accounting** Partner Edition instructor's account, you'll arrive at the accountant's dashboard. It's important to know how to move throughout the application from the accountant's dashboard to student accounts. The home page you see as the instructor will be different from that of your students.

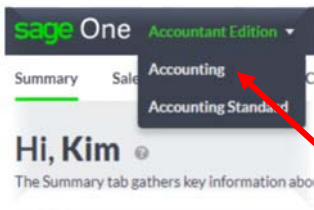
The Accountants Dashboard is:

- Where instructors invite students to collaborate with them
- Where instructors can access all student companies/accounting data
- Provides a list of all active and invited users (students)

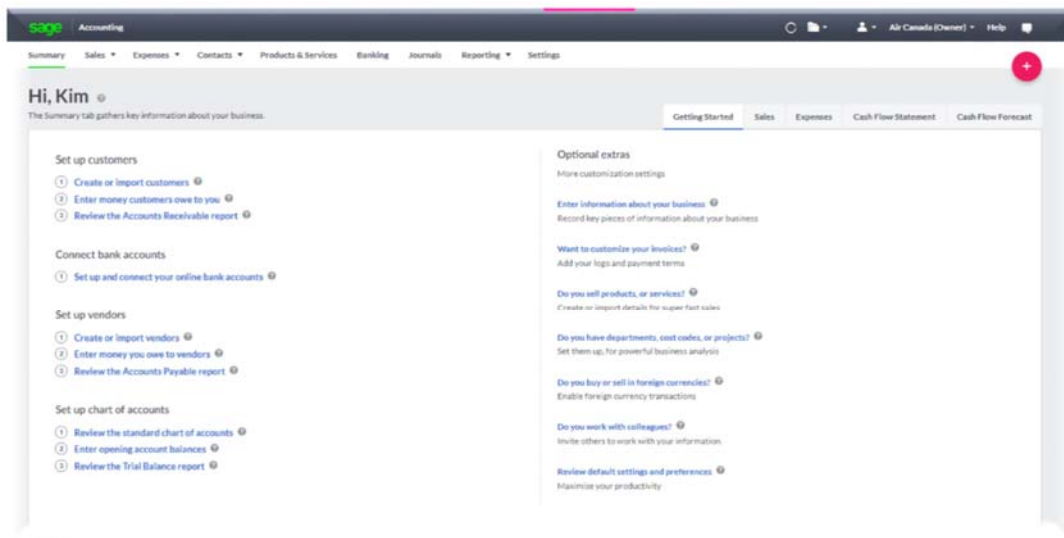


A complimentary **Accounting** account is provided as part of the **Accounting Partner Edition** subscription. The **Accounting** account is identical to a single end user/student account and does not require the instructor (Accountant) to sign-off to access their account or student companies. Business owners typically use this for their own business account to provide insight into the income and expenses for their own personal business.

To access the instructors **Accounting** account, click on **Accounting** in the menu bar at the top left-hand screen:



You'll be brought to the *Getting Started* dashboard, which is the same as a student's home page:



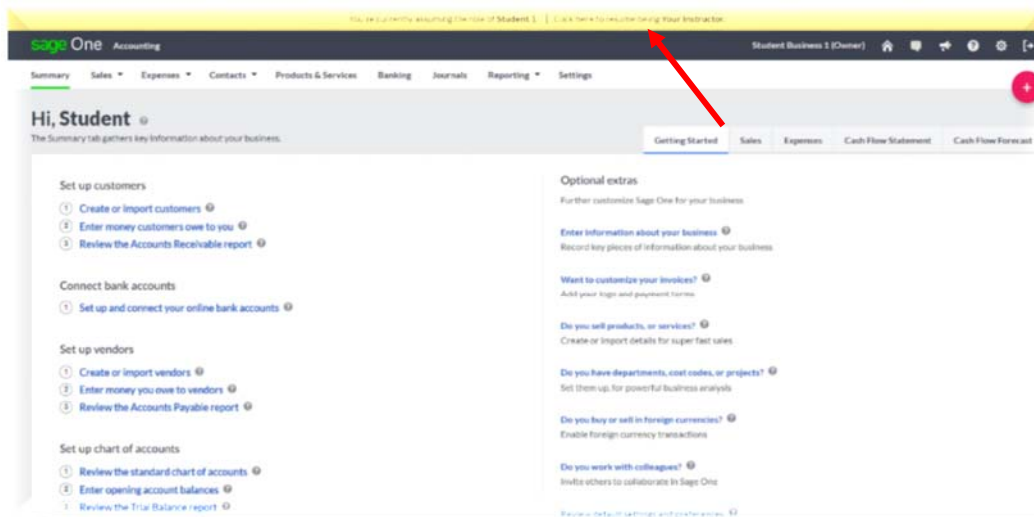
Similarly, to return to the *accountant's dashboard*, to access other student accounts, click on **Accountant Edition** from the menu bar:



All students invited to collaborate using **Accounting** will appear in the **Active Clients** list below once you've sent them an invitation to join **Accounting** and they've accepted. With the exception of the sample account (Christina Lopez), the Client List will be empty until your students create **Accounting** accounts, or until the instructor creates accounts for them.

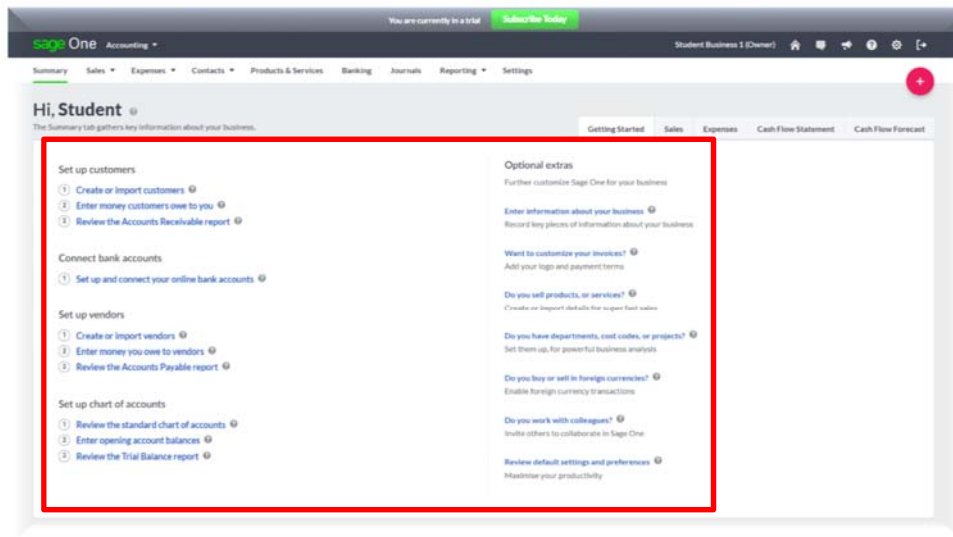
Navigating to/from Student Accounts

When navigating between student and instructor accounts from the *Accountant's Dashboard*, **Accounting** displays a notification in the yellow menu bar at the top of the screen denoting which role (account) you are currently assuming. This helps to determine whether you are in your own personal **Accounting** account, or a student's **Accounting** account. As you can see, the screens look the same, the only difference is the notification at the top of the page. Click on **Click here to resume being...** to return to the Instructor (Accountant's) dashboard.



Accounting (student account)

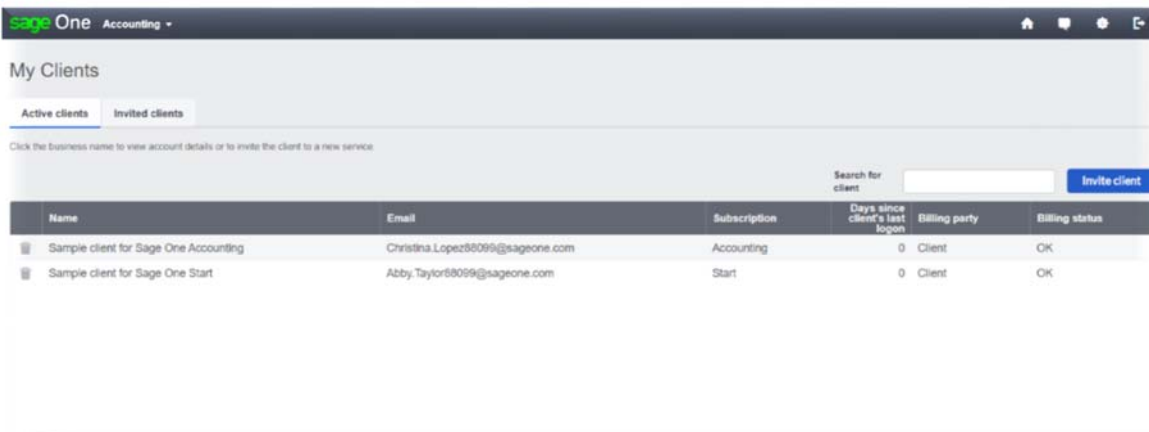
Once students sign up, the **Getting Started** dashboard is the home screen/landing page where they'll begin working within **Accounting**. The **Getting Started** dashboard guides students in setting up their company/records to **Setup customers**, **Connect bank accounts**, **Set-up vendors**, and **Set-up chart of accounts**. **Optional extras** guide users in customizing invoices, adding logos, setting up inventory, enabling foreign currency transactions, and review default settings to name just a few. The additional business tabs, **Sales**, **Expenses**, and **Cash Flow Statement/Forecast** provides insight into money coming in and going out of the business at a glance.



How to invite a student to use Accounting:

Once students are invited to use **Accounting**, you can begin to collaborate with them, to create and assign assignments, and access their company files to create a fun, interactive learning environment within the classroom. **Sage Business Cloud Accounting** is so easy to use, new student accounts can be set up in under 10 minutes.

1. Navigate to the *Accountant's Dashboard* and click **Invite client**:



2. Enter the students **First Name, Last Name, Email Address** and **Phone Number**.

Invite a New Client

First Name**

Last Name**

Email**

The email address cannot be changed once the client's account is set up.

Telephone**

My client needs help setting up Sage One. I would like a Sage One representative to call my client.

Invite my client to

- Try Sage One*
- Buy Sage One*

Invitation Format

- Send the invitation to my client*
- Send me the invitation so I can forward to my client*

Your email**

Subscription Payment

- My client will pay for this subscription themselves.
- My practice will pay for this subscription on my client's behalf.
This option is restricted to users who have purchased one of our Sage One partner packs

Step 1 of 3

Cancel Next

English (Canadian) © The Sage Group plc. 2018

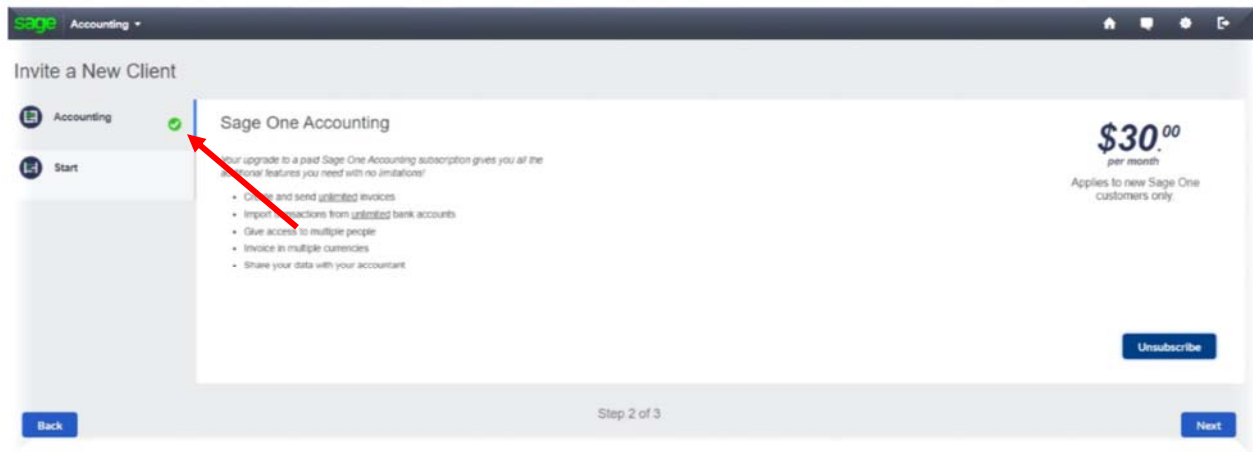
3. **Uncheck the box** that says, *“My client needs help setting up Sage One. I would like a Sage One representative to call my client”*.

4. Next, select **Try Sage Business Cloud Accounting** (*Sage One*) where it says **'Invite my Client To'**
5. In the **Invitation Format**, select **Send the Invitation To My Client**.
6. For **Subscription Payment**, select **My client will pay for this subscription themselves**.



NOTE: Students receive a 12-month complimentary account and will not be billed or asked for billing information.

7. Click **Next**.
8. The **Accounting** billing screen will appear. Select **Accounting** on the left-hand side. You'll notice a green check mark indicating the product you'd like to invite your student to use, next to it. Click **Subscribe**.



9. Click **Next**. You will be asked to confirm the student invitation.
10. If correct, click **Invite Client**.

sage One Accounting

Invite a New Client

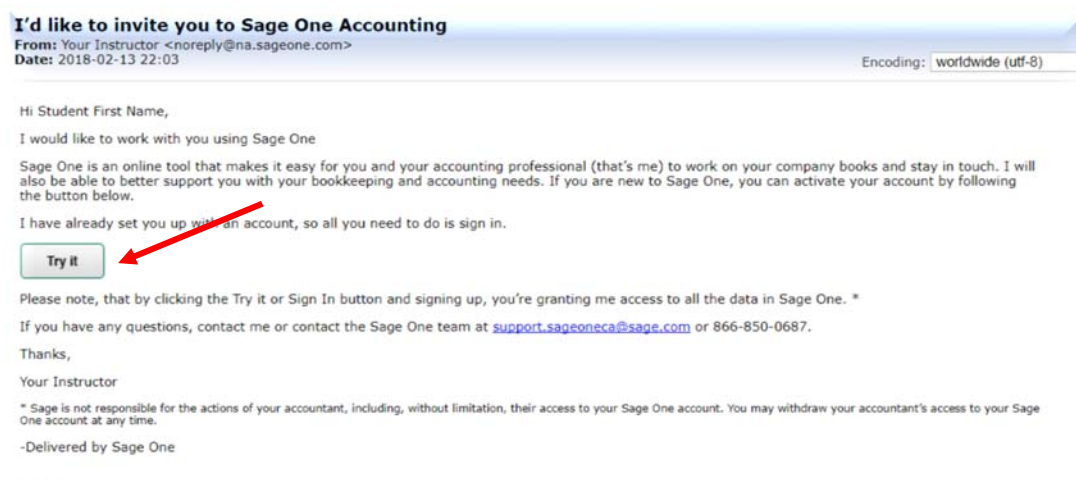
Verify the following information is correct before you send the invitation.

Client Name	Student First Name Student Last Name
Email	StudentEmailAddress@yopmail.com
Services	Sage One Accounting

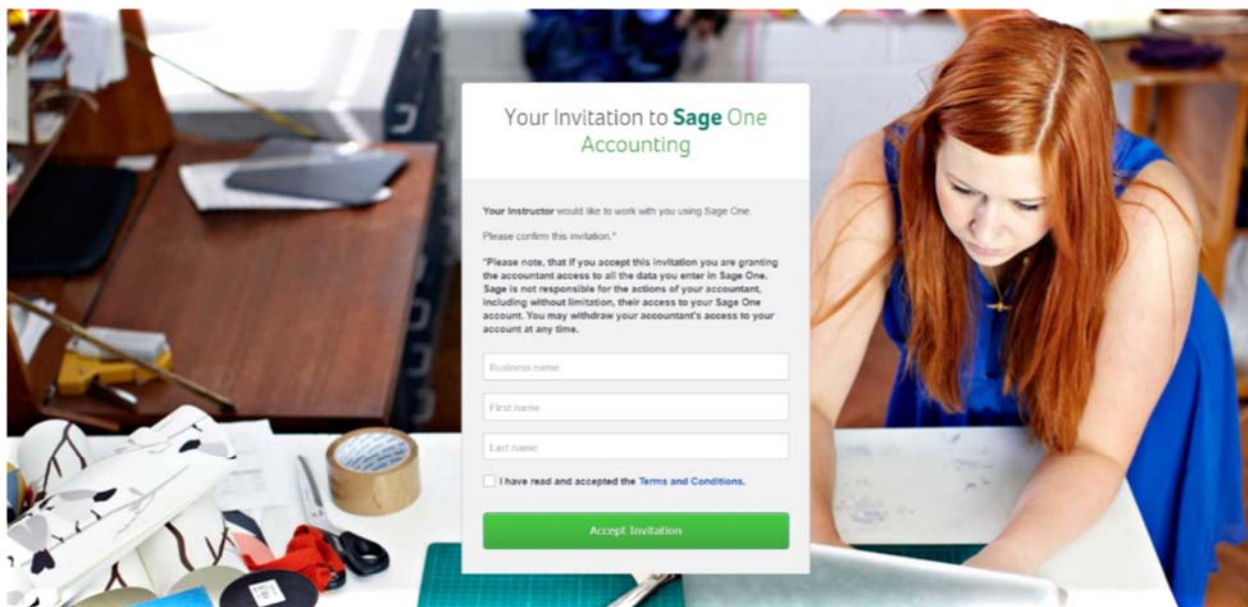
Back Step 3 of 3 Invite client

English (Canadian) © The Sage Group plc 2018

11. An email will be sent to the student asking them to begin collaborating with you in **Accounting**. Their invitation will appear in the invited tab on the *Accountant's Dashboard* until the student accepts.
12. If you have set up email accounts for your students, you can accept the invitation for them or you can wait for them to accept the invitation to begin working with you in **Accounting**.



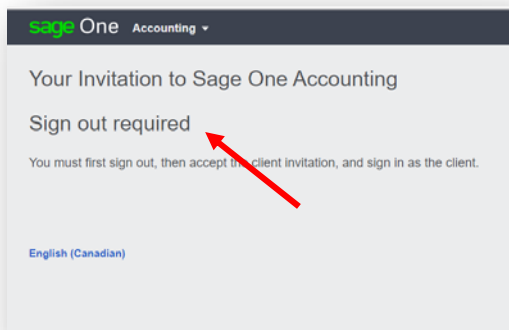
13. Once the student clicks **Try It** they'll be taken to the setup wizard, to create a demo company account. The demo company will be used throughout the course to replicate coursework scenarios.



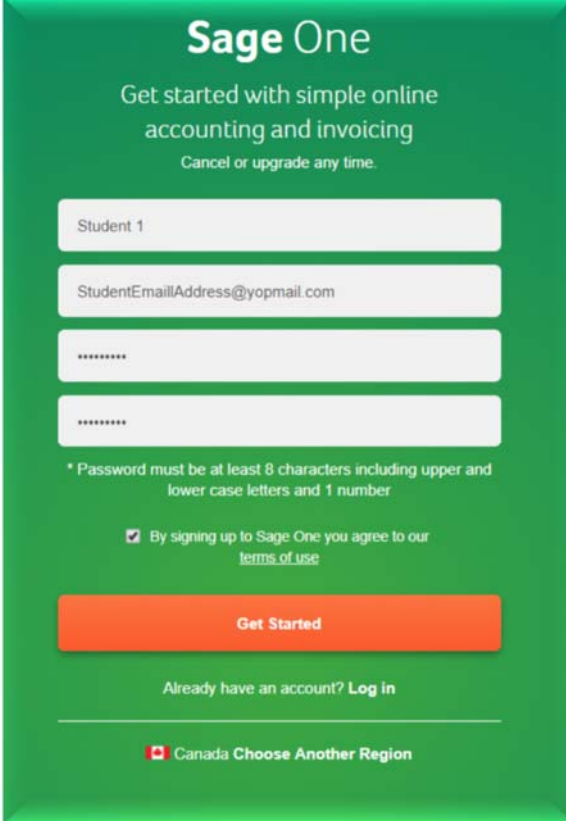
NOTE: Either the instructor or student can set up the demo account.



NOTE: If you plan to confirm/create student accounts on their behalf, you **MUST** be signed out of **Accounting** to prevent receiving a SSO or Single Sign On error message as shown here:



14. Fill in **student name**, **email address** and **password**. If setting up student accounts as the instructor, you can use unique naming conventions to identify the student account when collaborating with them in **Accounting**. Ex: Student Jones, Student Smith or Student 1, Student 2, Student 3, etc.



The image shows a sign-up form for Sage One. The form is set against a green background. At the top, it says "Sage One" in white, followed by "Get started with simple online accounting and invoicing" and "Cancel or upgrade any time." Below this are four input fields: a text field for "Student 1", an email field for "StudentEmailAddress@yopmail.com", and two password fields, both containing "*****". A note below the password fields states: "* Password must be at least 8 characters including upper and lower case letters and 1 number". There is a checkbox with a checkmark and the text "By signing up to Sage One you agree to our terms of use". Below the checkbox is an orange "Get Started" button. At the bottom, there is a link "Already have an account? Log in" and a small Canadian flag icon with the text "Canada Choose Another Region".

15. Acknowledge the **Terms of Use** Box and click **Get Started**.
16. The setup wizard will launch, prompting through three easy steps to setup the new company students will use throughout the duration of the course. The company name created here will appear on all invoices, credit notes, reports, etc.

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

17. Select the **Type Of Business**, either **Sole Proprietorship**, **Partnership**, **Corporation**, **Co-operative** or **Other**. Click **Save and Continue**.
18. Input an **Address** for the company. It's important to note, the Province added here will determine all applicable taxes should the company decide they charge sales tax.

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**

Address 2

Town / City**

Province ▼

Postal code**

Telephone**

Save and Continue

19. In the last step of the setup wizard, indicate whether or not the student's demo company will **Collect Sales Tax**. If so, input a fictitious 12-digit number in the **HST Number** field and click **All Done**. Under regular business circumstances, this number would be generated by the Canada Revenue Agency when small businesses register for the first time.

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* 230940980 RT 9809

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.

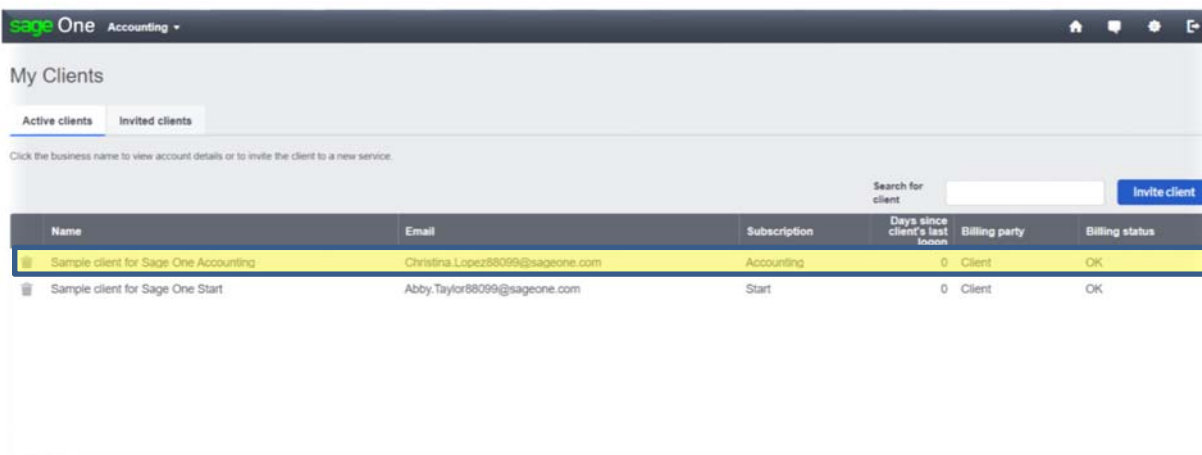
Tax rates for Ontario

All Done!

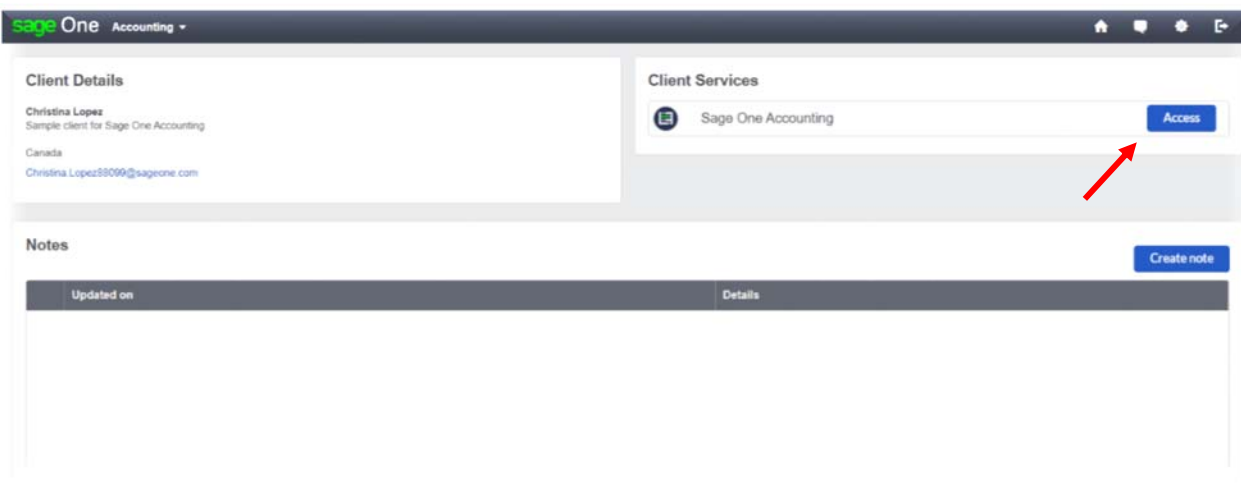
Sage Business Cloud Accounting completes the basic setup of the new company file including a standard chart of accounts. You (or your student) has just set up the first student account! Now, let's look at how to access their company files and begin collaborating with them.

Accessing Student Accounts

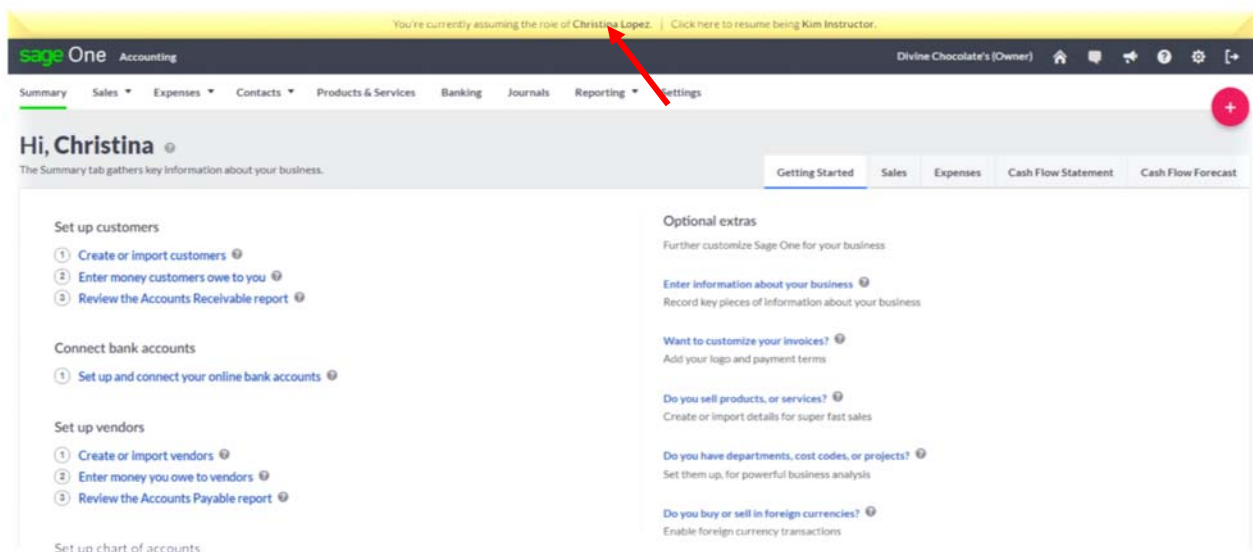
1. Highlight the student account from the list within the dashboard and click on it.



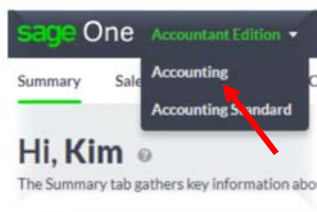
2. The student details box will appear. From here you can enter notes for the student, by clicking on **Create Note** for assignment info etc. To access their demo company/review assignments, click **Access**.



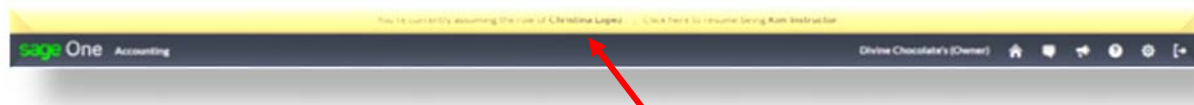
3. You now have access to move throughout the students account and begin collaborating. You can determine which student account you are in, by looking at the yellow bar at the top of the screen. It will tell you which 'role' or student account you are in.



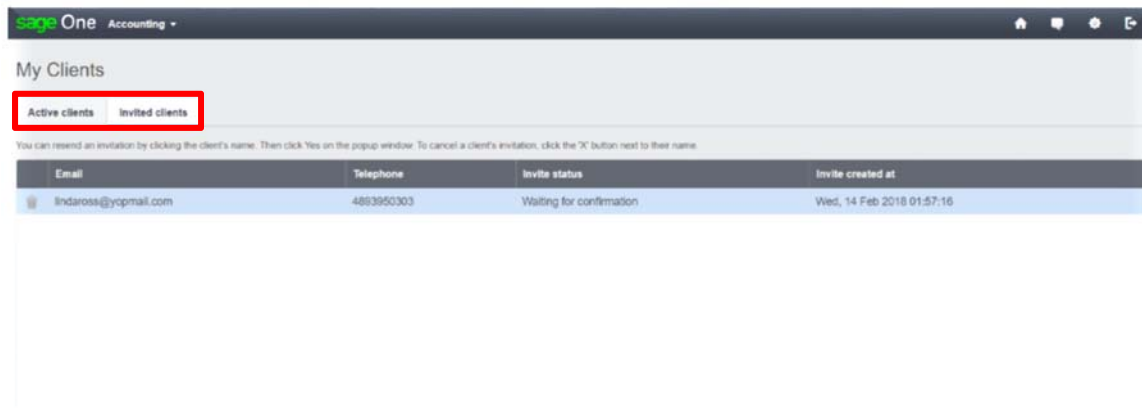
- To return to your personal instructor **Accounting** account from within a student account, click on **Accounting** at the top left-hand side of the screen.



- To return to the **Accounting Partner Edition Accountants Dashboard**, to collaborate with or invite another student, click on **Click her to resume being...(Instructor)**

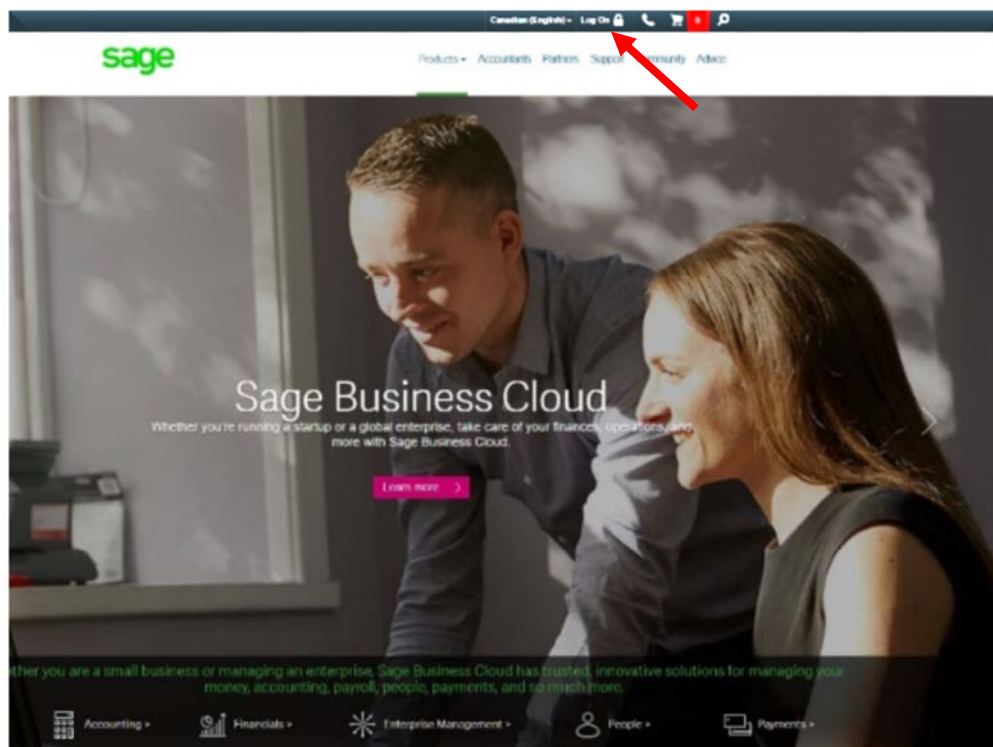


- Now that the student account has been confirmed and created, they will move from the **Invited** tab to **Active** within your student list on the *Accountant's Dashboard*.



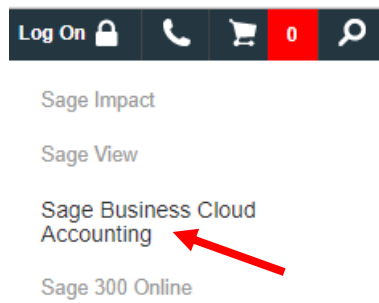
Returning to Accounting/Sign In

The next time you sign into **Accounting**, the single sign on feature lets you see all your students' accounts and company files in one location anytime, anywhere. You can add unlimited student users to collaborate with you, without limitation.

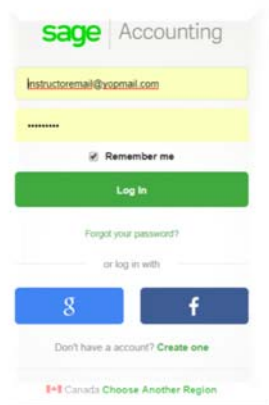


1. Navigate to the following link:
<https://www.sage.com/ca/>

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



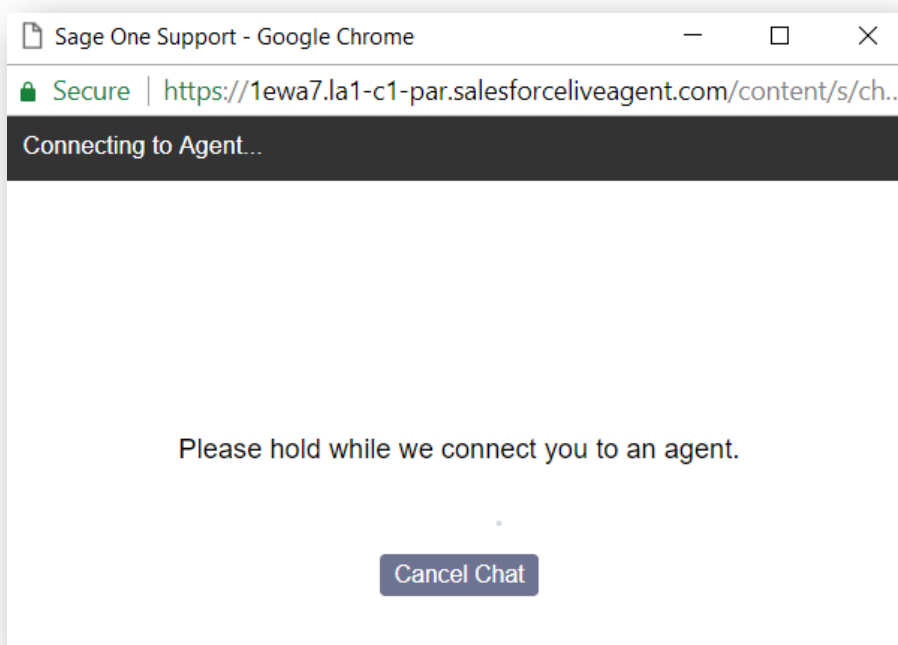
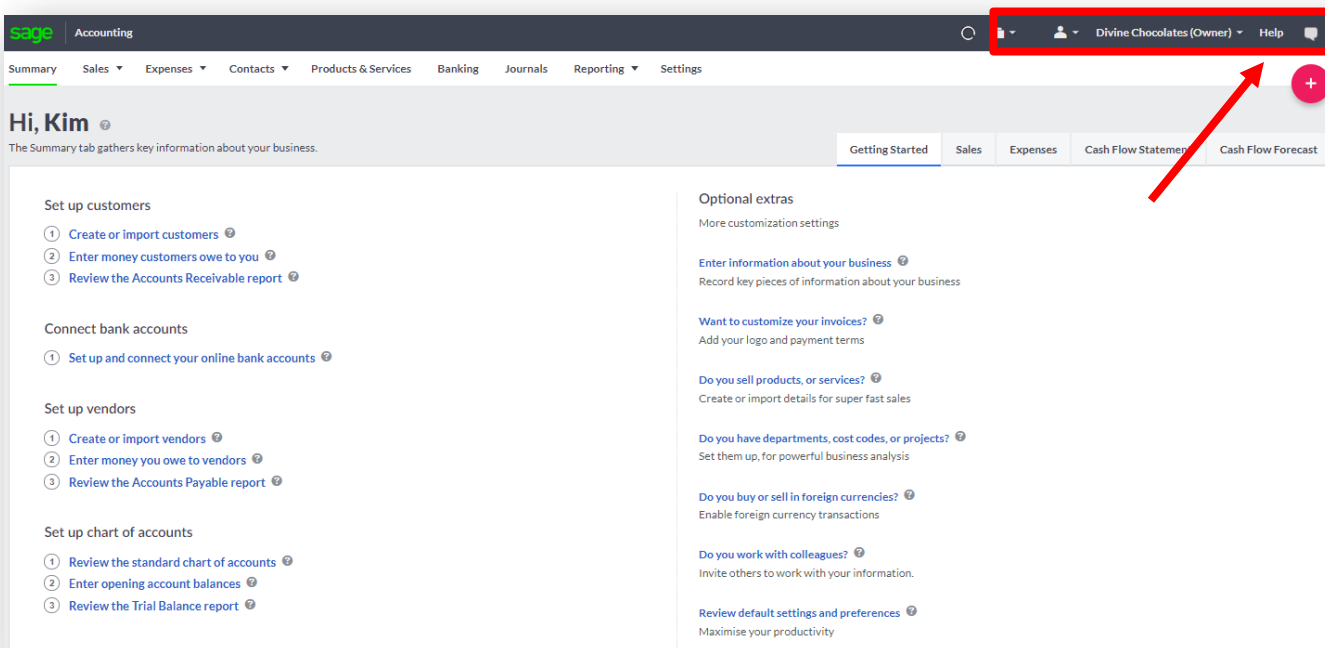
3. Enter your instructor **User ID** and **Password** used when registering:



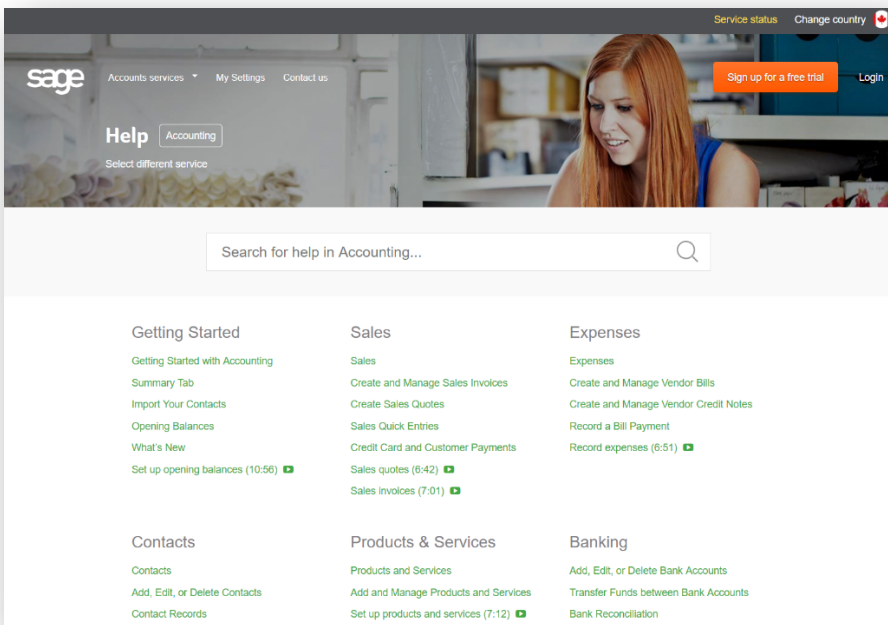
4. Click **Log In**.

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



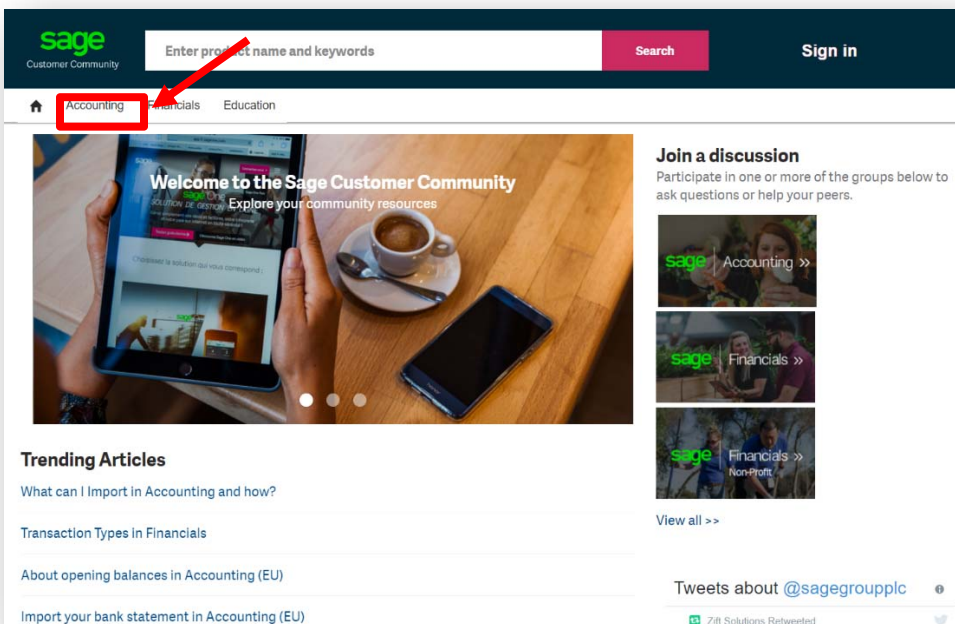
Click on the **Help** icon next to the **Chat** icon to access support articles and how-to videos:



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!

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

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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