



Sage Intacct Learning Centre Guide

www.itassolutions.co.uk

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What is the learning centre?

As a new Sage Intacct customer I'm sure you will be eager to learn the in's and out's of your new accounting software. To assist you in navigating the Sage Intacct interface, and performing all of your basic processes, Sage offers an online portal with access to training video's and materials to get you started.

Why do I need to use the learning centre?

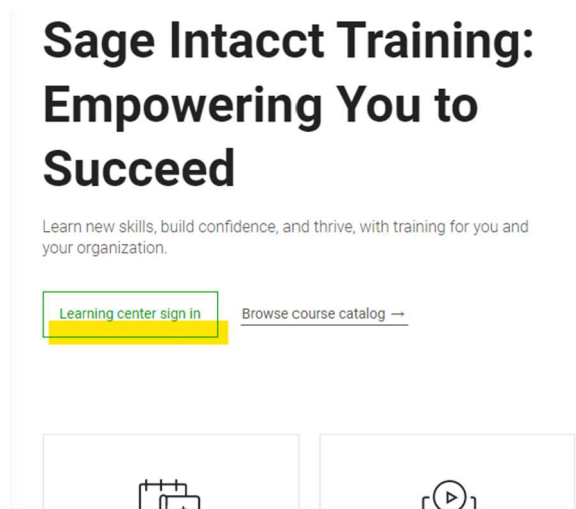
Sage Intacct offers a self-paced learning approach to gaining the knowledge you need to use your new software. Throughout your project you will be required to commit some time to studying the software at your own pace. This is to ensure that when we hand your configured system over to you for testing, you will already have the knowledge you need to navigate the system and perform your basic processes. The recommended timeframe for your self-paced learning will be detailed within your project plan. Once you have registered for the learning zone you will be able to access the materials throughout your project, and beyond go live. This is handy if you need to brush up on your knowledge on specific topics at a later date.



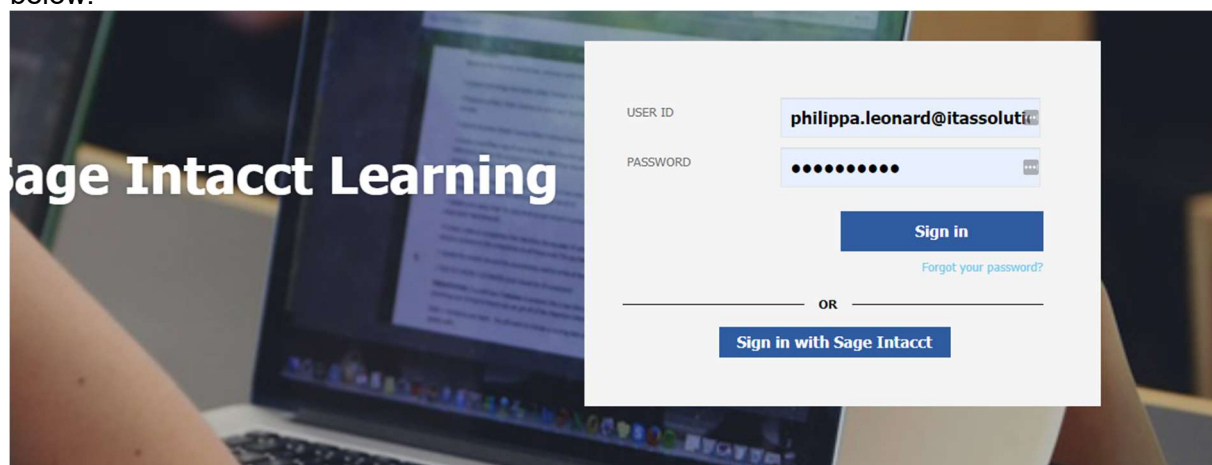
How do I access the learning centre?

Once your software order is placed your Sage Intacct Administrator will receive an email detailing the steps required to register for a learning zone account.

Registering is easy! Just go to <https://www.sageintacct.com/training> and click 'Learning Centre Sign In'



This will take you through to a home page where you can either enter your credentials or if you do not yet have an account you can select the 'Request an account' option shown below.



Welcome to the Sage Intacct Learning Center

Are you new to Sage Intacct and need to learn how to get started? Or have you been using Sage Intacct a while and need to learn more? Choose from short video tutorials, interactive self-paced learning, or instructor-led training in our virtual classroom.

Stay up-to-date on new features added each release!

Check out the videos in the Learning Center that show what's being updated and how you can

Need a Learning Center account?

Available to all customers and partners.

[Request an account](#)

Want to learn more?

[Check out these FAQs](#)



Allow 1-2 business days to receive your account. Learning zone accounts cannot be shared, so each Sage Intacct user will need to complete this form to register for their own learning zone account.

When completing this form, you will need to input your Company ID. You should have received this by now, but if you haven't don't worry, just ask your Project Manager who will be happy to assist you with this.

Company ID:

Where do I start my Sage Intacct Training?

Basic training is key to understanding how the system works and being able to relate your business processes to it during the Define phase, It is also crucial for when you come to complete UAT Testing.

With so many courses to choose from it is difficult to know where to begin.

From the homepage you will see some different options across the top, If you select Learning Paths you are able to then select the most appropriate learning path for your job role and begin working through those courses.

Catalog

Learning Paths

Use Sage Intacct Learning Paths to determine what courses relate to specific user roles.

AP Processor > AR Processor > Controller > Contracts/ Sales Manager > System Admin > Sage Intacct Accounting Specialist > Sage Intacct Implementation Specialist >

AP Processor

1) Prerequisites	Getting Started with Sage Intacct (Completed) Working with Multi-Entity Shared Environments (Completed)
2) Core Courses	Working with Accounts Payable
3) Additional On-demand Courses	Working with the General Ledger (Completed) Sage Intacct Fundamentals On-demand (NA)



Sage Intacct Fundamentals

We recommend registering to attend the Sage Intacct Fundamentals Training Course (on Demand), as shown below.



Philippa Leonard

Featured



Getting Started with Sage Intacct

Featured



Sage Intacct Fundamentals On-demand (NA)

Featured



Sage Intacct Fundamentals On-demand (UK)

Featured



Financial Reporting and Dashboards On-demand

Catalog

Overview

Course Registration

Overview

This course teaches business users how to navigate and perform common procedures, such as entering purchase invoices and reconciling bank statements and credit cards. You will also gain insights.

Prerequisites:

Overview

Course Registration

Course Registration

Schedule Duration: 8.00 hour(s)

On-demand with Lab (CPE)

START VIDEO

The *Sage Intacct Fundamentals Recording (International)* training course is a free and teaches business users how to navigate and perform accounting functions using Sage Intacct. It covers common procedures, such as entering invoices, making, and receiving payments, reconciling bank statements, closing periods and an introduction to reporting.

To register for the course, login to the Learning Centre and search for *Sage Intacct Fundamentals Recording (International)*. Next, select "Course Registration" and then "Start Video".



Additional Recommended Courses

As well as the Sage Fundamentals course and consultant led training sessions which are included in your implementation cost, the learning centre offers further on-demand training.

The following on-demand education videos are accessible from the Sage Intacct Learning Centre and provide education on key Sage Intacct concepts further preparing you for later activities on the project.

Note that all Sage Intacct users should watch the first 3 videos listed below, while the other videos can be assigned to your team members at your discretion depending on their roles and responsibilities for the project and within your company.

- Getting Started with Sage Intacct
- Working with Multi-Entity Shared Environments (25minutes)
- Working with the General Ledger (1 hour, 10 minutes)

- Working with Accounts Payable (1 hour, 50 minutes)
- Working with Accounts Receivable (1 hour, 20 minutes)
- Managing Users, Roles & Permissions

We hope you enjoy your Sage Intacct learning experience.