



PO Box 14955
Farrarmere
Benoni 1518

E-mail : info@tctraining.co.za
Website: www.tctraining.co.za

Managing Director: T. Webster

Sage Pastel Partner Add-On Modules Training

Receipting Module

This course has been designed for learners who work on the Sage Pastel Partner Receipting module and would like to enhance their knowledge of the product.

Sage Pastel Receipting is a specialised add-on module that allows you to enter data once in order to process and print receipts. You can do this without having to use your cashbook. Once you are ready, Sage Pastel Receipting will automatically move the receipts into your cashbook for you.

You will cover the following course objectives:

- Setting up the Receipting module
- Processing in Receipting module
- Receipting module reports

Duration: ½ day course

Bank Manager

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Bank Manager add-on module.

This course has been designed for learners who want to reduce their cashbook processing time in Sage Pastel Partner.

This module allows you to import your internet bank statements into Sage Pastel's cashbook system. It streamlines the process by allowing you to set up frequent transactions once, which will then be recognised in future bank statements. You are also able to set up your transactions so that Sage Pastel Partner Bank Manager will allocate an account (General Ledger, customer or supplier) and a description to regular transactions.



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You will cover the following course objectives:

- Downloading your bank statement
- Opening the bank statement
- Set Up
- Updating the Batch

Duration: ½ day course

Bill of Materials (BOM) & Manufacturing

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Bill of Materials and Manufacturing module.

This course has been designed for learners who want to enhance their production and manufacturing skills while using Sage Pastel Partner.

These modules work together and allow you to manufacture and assemble items with ease and perfection. You can also manufacture items as you process an invoice and can create as many sub levels or components as you require.

You will cover the following course objectives:

- Set Up the Manufacturing Module
- Create Bills of Materials and Kit Item Codes
- Manufacture and Un-manufacture Items
- Using Kit Items
- Reporting on Manufacturing

Duration: ½ day course



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Debtors Manager

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Debtors Manager module.

This course has been designed for learners who want to enhance their fixed assets processing and tracking skills in Sage Pastel Partner Version 14.

This module allows you to collect outstanding money from customers and keeps a tracking record of all entries. The Debtors Manager module will also post reminders when to contact customers and supply detailed reports of outstanding payments and received payments.

You will cover the following course objectives:

- Installing Debtors Manager
- Setting up Debtors Manager
- Processing in Debtors Manager

Duration: ½ day course

GL Manager Module

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner General Ledger add-on module.

This course has been designed for learners who want to enhance their general ledger processing skills in a Sage Pastel Partner environment.

The General Ledger Manager module allows you to make changes to your General Ledger that is not possible to do by editing accounts. You would use the General Ledger Manager to restructure your General Ledger to reflect changes in your business or to correct errors that have been made when creating accounts. For example if you selected the incorrect chart of accounts when creating your company and have then worked in the company, you can adjust the General Ledger using this module.



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You will cover the following course objectives:

- Renumber General Ledger Accounts
- Delete General Ledger Accounts
- Consolidate General Ledger Accounts
- Change Financial Categories
- Change GAAP Categories
- Print the Audit Trail

Duration: ½ day course

Fixed Assets

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Fixed Assets add-on module.

This course has been designed for learners who want to enhance their fixed assets processing and tracking skills in Partner.

The following will be covered:

- How to set up the asset defaults
- How to create master assets as well as sub assets
- Calculating book and tax depreciation
- A comprehensive overview of Capex Budgets and Orders
- Linking master and sub assets
- The different reports available for assets

Duration: 1 day course

Multi-Currency

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Multi-Currency add-on module.

This course has been designed for learners who want to enhance their foreign currency processing skills in Sage Pastel Partner.



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This module allows you to create different foreign currencies as well as process in different currencies. It also allows you to split importation costs whilst processing inventory, supplier or customer invoices.

You will cover the following course objectives:

- Setting up Multi-Currency
- Processing in Multi-Currency
- Multi-Currency Reports

Duration: ½ day course

Multi-Stores

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Multi-Stores add-on module.

This course has been designed for learners who work with warehouses and want to enhance their processing and managing skills relating to inventory in a warehouse environment.

This module allows you to create separate stores with different inventory items linked to them. The system tracks inventory quantities per store. You can even have different selling prices for inventory items for different stores.

You will cover the following course objectives:

- Activate the Multi-store module
- Set document numbers
- Create stores
- Link inventory items
- Set user access for the stores

Duration: ½ day course



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Point of Sale

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Point of Sale (POS) add-on module.

This course has been designed for learners who want to enhance their Point of Sale processing and management skills in a Sage Pastel Partner environment.

Sage Pastel Point of Sale (POS) is a simple and secure retail solution. Sage POS is powerful, yet easy to set up and operate.

You will cover the following course objectives:

- Setting Up Point of Sale
- Processing Point of Sale transactions
- Point of Sale Reports
- Compacting the Database

Duration: ½ day course

Serial Number Tracking

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Serial Number tracking add-on module.

This course has been designed for learners who want to enhance their inventory processing and tracking skills in a Sage Pastel Partner environment.

This module will take you through the processes and functions that allow you to track inventory items individually by their serial numbers. This function is very useful for tracking warranties and guarantees. The system keeps a full history of each item's movement into and out of the company using the serial numbers as reference.



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You will cover the following course objectives:

- Setting up serial numbers
- Creating serial numbers
- Processing with serial numbers
- Serial number reports

Duration: ½ day course

Project tracker

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Project tracker add-on module.

This course has been designed for learners who require in-depth reporting. The reporting in Project Tracker can be customised and set up to meet the needs of the organisation and reports can be generated on different levels of the organisation. Reports can also be generated for specific projects that the organisation may undertake.

In the Project Tracker course you will gain the required knowledge and skills to set up Project Tracker and link the groups to enable reporting on these varies levels as determined by the organisation.

Duration: ½ day course

Time and Billing

This comprehensive training programme will cover the functions and features of the Sage Pastel Partner Time and Billing add-on module.

This course has been designed for learners who want to enhance their processing skills when using the Time and Billing module.

The Sage Pastel Partner Time and Billing module allows you to bill your employees' time to your customers. Simply fill out timesheets for your employees and charge your customers via activities. The activities that you create are the services you sell to your customers.



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You will cover the following course objectives:

- Setting up Time and Billing
- Processing timesheets
- Generating Time and Billing invoices
- Time and Billing reports Duration: ½ day course

Duration: ½ day course

Year End

This comprehensive training programme covers the Sage Pastel Partner Year End process.

This course has been designed for learners who want to gain the knowledge and skills on how to perform a year end in Sage Pastel Partner Version 14.

This course includes the following content:

- Preparing to run Year End
- The Year End Checklist
- Running the Year End Assistant
- Possible Problems and Solutions
- After Year End

Duration: ½ day course



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Entrance Requirements for Add-on Modules

Learners need to meet the following prerequisites before attending the Sage Pastel Partner Add-on Modules courses:

1. Bookkeeping NQF Level 3 qualification or Standard 8/Grade 10 Bookkeeping
2. Computer Literacy at NQF Level 3 or Standard 8/Grade 10 Computer Literacy
3. Mathematical Literacy or Standard 8/Grade 10 Mathematics
4. Sage Pastel Partner Version 14 Practitioner Course (Module 1)

If you are not yet competent in the required prerequisites, you must first complete the relevant courses before enrolling for this course. It is essential that the course prerequisites are met so as to avoid being asked to leave and the course fees being forfeited.

Assessments

The Assessment has to be written within 6 months from the commencement date of your training. To make it easier for you, all the Sage Pastel assessments are now online. This means that you can write the assessment in your own time and in the comfort of your own home provided you have a computer with internet access. Assessments are offered only in English.