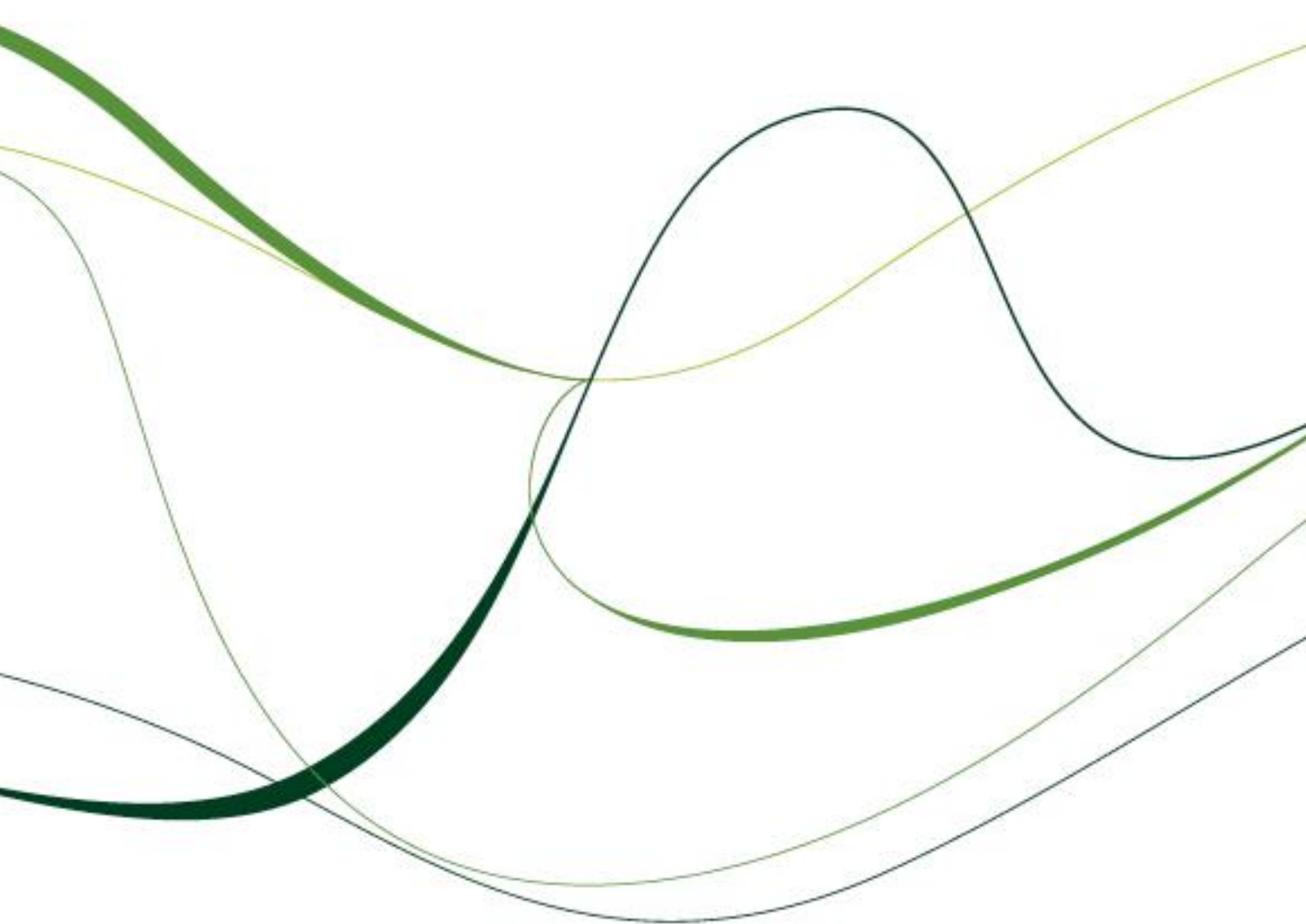


# Sage Certification User Guide



sage

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## **About Sage Certification**

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Sage Certification is the only comprehensive, performance-based certification program that is approved by Sage to validate an individual's skills using Sage software.

Successful candidates will receive a certificate for passing the relevant exam level based on the Sage Instant Accounts, Sage 50 Accounts, Sage 50 Payroll or Sage ACT! software. This sets them apart from their peers in the competitive job market. The certificate is a valuable credential, recognised as proof that an individual has the skills needed to work productively and efficiently with Sage Instant Accounts, Sage 50 Accounts, Sage 50 Payroll or Sage ACT!

By encouraging individuals to develop advanced skills with Sage Instant Accounts, Sage 50 Accounts, Sage 50 Payroll or Sage ACT!, Sage Certification is helping to fill the demand for qualified, knowledgeable people in the workplace. Sage Certification also helps satisfy an organisation's need for a qualitative assessment of employee skills. The Sage 50 Accounts, Sage 50 Payroll and Sage ACT! exams offer different levels of certification, dependent on the areas of Sage 50 Accounts, Sage 50 Payroll or Sage ACT! used by the individual and/or the company.

## **Benefits of Certification**

### **Individuals**

Earning Sage Certification acknowledges that you have the expertise to work with Sage software.

Generic industry research tells us that certified individuals report increased competence and productivity as well as increased credibility with their employers, co-workers, and clients. Sage Certification will set you apart in today's competitive job market, bringing employment opportunities, greater earning potential and career advancement, in addition to increased job satisfaction.

### **Businesses**

Industry research demonstrates that employers who encourage certification and hire certified candidates report increased employee competence and productivity. Sage Certification can simplify the employee selection and hiring process by easily identifying individuals with the skills to be productive from day one. Investing in the skills of existing employees brings improved employee morale, confidence, and productivity, whilst increasing your bottom line.

## **Sage Certification exam syllabus**

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There are various levels of Sage Instant Accounts, Sage 50 Accounts, Sage 50 Payroll and Sage ACT! Certification. Each level addresses different aspects of the Sage Instant Accounts, Sage 50 Accounts, Sage 50 Payroll or Sage ACT! software. We recommend you begin and complete the first level before moving onto the advanced levels, although this is not compulsory.

### **Sage Instant Accounts exam syllabus**

Sage Certification will test your knowledge in the following areas:

- Use shortcut keys and navigate around your software
- Deal with company settings and access rights
- Backup, restore and check your data
- Match function keys to the shortcuts they perform
- Configure the chart of accounts
- Check customer and supplier defaults
- Create new customer, supplier, nominal and bank records
- Work with bank, cash and credit card transactions
- Raise and pay customer and supplier invoices
- Print a bank statement
- Perform a bank reconciliation
- Run financial reports
- Deal with the VAT return
- Check and correct transactions.

# Sage 50 Accounts exam syllabus

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Sage Certification will test your knowledge in the following areas:

## Level 1

- Use shortcut keys and navigate around your software
- Deal with company settings and access rights
- Backup, restore and check your data
- Configure the chart of accounts
- Create and maintain nominal records and budgets
- Prepare, plan and post opening balances
- Set up customer details, defaults, terms and status
- Set up supplier details, defaults and terms
- Work with bank, cash, credit card payments and receipts
- Post invoices and credit notes
- Record customer receipts and disputed items
- Post payments, match credit notes and payments on account
- Post journals
- Check and correct transactions.

## Level 2

- Perform a bank reconciliation
- Apply search criteria, multiple searches and wild cards
- Review the ageing frequency on outstanding invoices, age invoices and produce ageing reports
- Understand the different types of customer correspondence
- Flag invoices in dispute, write off customer or supplier transactions and adjust VAT accordingly
- Set up and process recurring transactions
- Set up and post depreciation and dispose of an asset
- Set up and process prepayments and accruals
- Deal with the VAT return and run the year end
- Produce profit and loss, balance sheet, budget reports, departmental reports and transfer basic information to Microsoft Excel and Word
- Understand and interpret the results from your management reports.

## **Sage 50 Accounts exam syllabus**

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### **Level 3**

- Plan a stock system
- Create product records
- Set up a product assembly
- Enter opening balances for stock levels
- Perform a stock take and make adjustments
- Perform a stock period end and a year end
- Set up and maintain pricing and discount structures
- Create and process sales and purchase orders
- Create multiple delivery addresses
- Create quotes and pro-forma documents
- Create product invoices and credit notes
- Setup recurring invoices and orders.



# Sage 50 Payroll exam syllabus

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Sage Certification will test your knowledge in the following areas:

## Level 1

- Use shortcut keys and navigate around your software
- Deal with access rights
- Backup, rollback and restore your data
- Set up legislation and company details
- Create employee records, personnel records and use global changes
- Enter year to date values
- Set up pay elements
- Process your payroll run
- Set up and use pension schemes, company loan schemes and produce the P32
- Reset payments and use the timesheet entry
- Deal with new starters and leavers
- Understand the pay review and variance settings
- Advance holiday pay and record holidays and absences.

## Level 2

- Work with the Nominal link to Sage Accounts
- Export data to files
- Import data into Sage 50 Payroll
- Use the Microsoft integration tools and task reminders in Sage 50 Payroll
- Deal with attachment of earnings orders
- Set up and process student loans
- Apply SSP, SMP, SAP and SPP to your payroll
- Understand the payroll tax month end process
- Use e-banking in Sage 50 Payroll to make BACS payments
- Process the payroll over the tax year end and work with historical data
- Deal with the payroll tax year end
- Understand the audit trail and HMRC inspection reports
- Make E-submissions
- Produce reports from Sage 50 Payroll

## Sage ACT! exam syllabus

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Sage Certification will test your knowledge in the following areas:

### Users exam

- Navigate the software and define settings
- Create contact records and use the contact list
- Add notes and history to a contact record
- Perform lookup and advanced searches
- Create letter templates and perform mail merges
- Send emails and perform email mail merges
- Use Outlook Synchronisation
- Record activities onto a contact record
- Create opportunities on a contact record
- Create group and companies
- Perform smart tasks.

### Administrators exam

- Create new databases and users
- Import and export data
- Use and amend dashboards
- Perform database maintenance
- Customise database fields
- Customise database layouts
- Customise menus and toolbars
- Customise and create smart tasks
- Use the Accounting link
- Search for duplicate records and work with global changes.

## **Test your skills for free**

Before you take your certification exam, we recommend you assess your knowledge of your Sage software.

You can do this by taking a free, online diagnostic test from <http://www.sagecertification.co.uk/q4/open.dll>

To login, enter the word Test in both the Name and the Group, click enter, and then click the diagnostic test of your choice.

On completion, these tests will provide you with online feedback.

## Rules and regulations

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1. You are responsible for ensuring that the PC or laptop you use to take the exam complies fully with the Sage Certification minimum system requirements.
2. You should ensure that the place that you choose to sit your exam is suitable, and that it is quiet and free from distraction.
3. Your exam will last for 60 minutes. If you have not completed your exam within 60 minutes the questions you have completed will be submitted automatically.
4. All Sage Certification exams are open book. This means that you can have notes and other study materials open when sitting your exam.
5. Your exam should be all your own work. You are not permitted to seek assistance and from family, friends or colleagues.
6. If it appears that a candidate has breached any of the above rules Sage will conduct an investigation. This may result in no certificate being issued and exclusion from any future Sage Certification exams.

## **System requirements**

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Before taking your Sage Certification exam you should check that your PC meets the following specifications:

### **Internet connection**

The Sage Certification exam includes simulated questions from Sage software, therefore you must be using a broadband connection. We recommend that you have a minimum of 2MB connection.

### **Hardware**

We recommend that you have the following computer hardware:

- An IBM® PC or compatible with a Pentium® 1 GHz processor or equivalent
- 512 MB RAM
- 1GB memory for Microsoft Vista.
- A monitor with SVGA resolution video card and monitor supported by Windows running at 1024x768 pixels with a minimum of 24 bit true colour.

### **Operating systems**

You must be using one of the following operating systems:

- Microsoft Windows XP SP3
- Microsoft Windows Server 2003
- Microsoft Windows Vista
- Microsoft Windows 7

## **Software required**

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- QMSecure (this can be downloaded from the Sage Certification website explained later in the user guide).
- Adobe Flash™ player version 9 or higher.

## **Required web browser**

- Microsoft Internet Explorer 6.0, or higher.

## **Compatible web browser**

- Mozilla® Firefox™ 1.5 or higher.

## **Preparing to take your Sage Certification exam**

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The following section outlines the preparation you should undertake prior to taking your Sage Certification exam:

You will need to:

- Check your PC settings
- Download and install QMSecure
- Take the Sage Certification pre exam questions.

### **Checking your PC settings**

We strongly advise that you check your PC configuration prior to taking your Sage Certification exam.

#### **Screen resolution**

Please check your screen resolution is set to a minimum of 1024 x 768

You can check or change your screen resolution by:

1. Select Start > Settings > Control Panel
2. Double- click on the Display icon
3. Choose the Settings tab
4. Adjust the screen area to a minimum of 1024 x 768.

#### **Supported browsers**

As outlined within the system requirements, Sage Certification has been tested using the following internet browsers.

- Internet Explorer v6 or above or
- Firefox version 1.5 or above.

## Flash player

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To complete the simulated questions from Sage software, you will need a flash player, version nine or above.

The best way to check if your PC has a compatible flash player installed is to complete the Sage Certification pre exam, details of which can be found later in this user guide.

**Note:** You can download a flash player free of charge from the following site:

<http://www.macromedia.com>

## QMSecure

You must install QMSecure before you take your Sage Certification exam.

Most browsers are designed to be as open and flexible as possible, however within a test environment they are not ideal. This is because a candidate could easily email a friend, or open a Sage program to check answers.

## About QMSecure

All Sage Certification tests are delivered using QMSecure. You will notice that it behaves differently from your usual Internet browser in that:

- It will display your exam full screen
- You can only navigate using the exam controls for next, previous, and submit etc.
- You cannot start other programs or access the Windows start menu
- You cannot refresh, escape or close your browser as you normally would
- Most key-presses and mouse-clicks (except those appropriate to answering questions) are not permitted.



## Downloading QMSecure

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You should download and install QMSecure on the PC you intend to take your Sage Certification exam. QMSecure is available to download from the Sage Certification website.

To download:

1. QMSecure can be downloaded from:

[http://www.sagecertification.co.uk/download/qm\\_secure.exe](http://www.sagecertification.co.uk/download/qm_secure.exe)

2. The following screen will appear, select Save:



3. Save QMSecure in an appropriate directory. We suggest saving the file to your desktop.

**Note:** If you have any pop-up blocking software installed, it may prevent you from downloading this file. It may be necessary to temporarily disable the blocking of pop-ups.

## Installing QMSecure

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To install QMSecure follow the instructions below:

1. Locate and double-click the file qm\_secure.exe
2. Once you've launched the install program, you will see the Welcome screen.



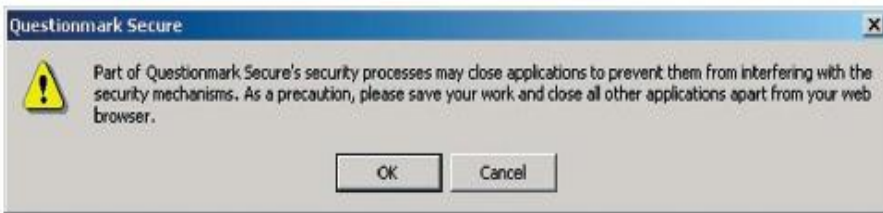
3. Click Next.
4. In the license agreement screen, read the license agreement and then indicate your acceptance of the terms of the agreement by clicking Yes.
5. In the Destination Location dialog screen you can accept the default location for the installation (c:\Program Files\Questionmark), or you can install to an alternative directory by clicking the Browse... button and browsing to the local drive and directory in which you want to install. Once you are happy with the destination folder click OK.
6. In the Start Copying Files dialog screen click Next to start the installation.
7. Click Finish to Complete the installation.

## Using QMSecure

---

Once installed QMSecure will start automatically whenever you begin an exam. Please note that QMSecure may close some of your applications therefore you should **save your work and close** all open programs apart from your browser before starting.

You will see the following message as a reminder to save your work:



Once you have completed an exam QMSecure will warn you that it is about to close.



Selecting Yes will close QMSecure, you will be returned to the Sage Certification home page and your internet browser restored to it is usual settings.

## Uninstalling QMSecure

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If you want to un-install QMSecure after completing your exam, you can do so by using the Windows **Add/Remove Programs** facility:

1. From your Windows Start menu, select **Control Panel**.
2. Select **Add/Remove Programs**.
3. Scroll down until you find the entry for **Questionmark Secure** and select it.



4. Click the **Change/Remove** button. You should see a progress dialog indicating the progress of the uninstall. When finished QMSecure will no longer be present on your computer.

## Sage Certification pre exam

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In order to familiarise yourself with the Sage Certification exam environment we have created a “pre exam” designed to help you navigate your way through your Certification.

We recommend you complete the Sage Certification pre exam as it will provide you with vital information prior to taking your actual Sage Certification. The pre exam will guide you through the question types you will be presented with, navigation tips and guidance on how to answer simulation questions.

When you purchase Sage Certification you will receive an email confirming your username and password. Please use this to view the Sage Certification pre exam.

Sitting the pre exam allows you to rectify any technical issues you may encounter before you sit your actual exam and you can sit the pre exam as many times as you like. However, you can only take your actual certification exam **ONCE**.

## Logging In

When you are ready to view the Sage Certification pre exam, follow the steps below:

1. **Save** your work and **close** all open programs.
2. Open your browser and navigate to the Sage Certification site, **[www.sagecertification.co.uk/login](http://www.sagecertification.co.uk/login)**
3. Enter your login details provided in your confirmation email and select **Enter**:



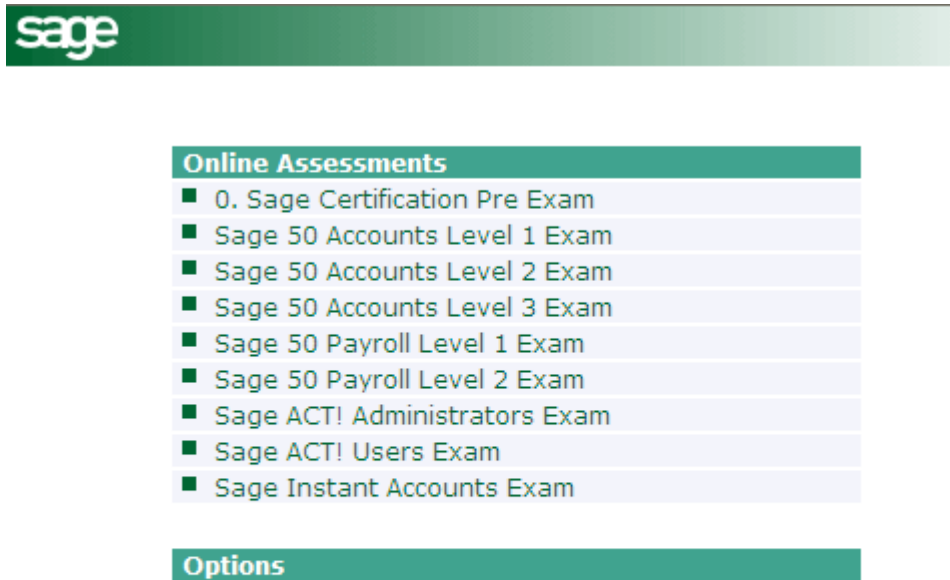
The screenshot shows a login form with a green header bar that reads "Please enter your name and password below". Below the header, there are two input fields: "Name:" with the value "sharron.smith@yahoo.co.uk" and "Password:" with the value "\*\*\*\*\*". Below the password field, there is a checkbox labeled "Show list of any unfinished assessments" which is currently unchecked. At the bottom of the form, there is a button labeled "Enter".

## Selecting the pre exam

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1. You will now be able to see all exams that have been purchased and scheduled.

2. **Select the 0. Sage Certification Pre Exam.**



Questionmark Perception licensed to Sage UK Ltd.

3. Follow the on-screen instructions provided.

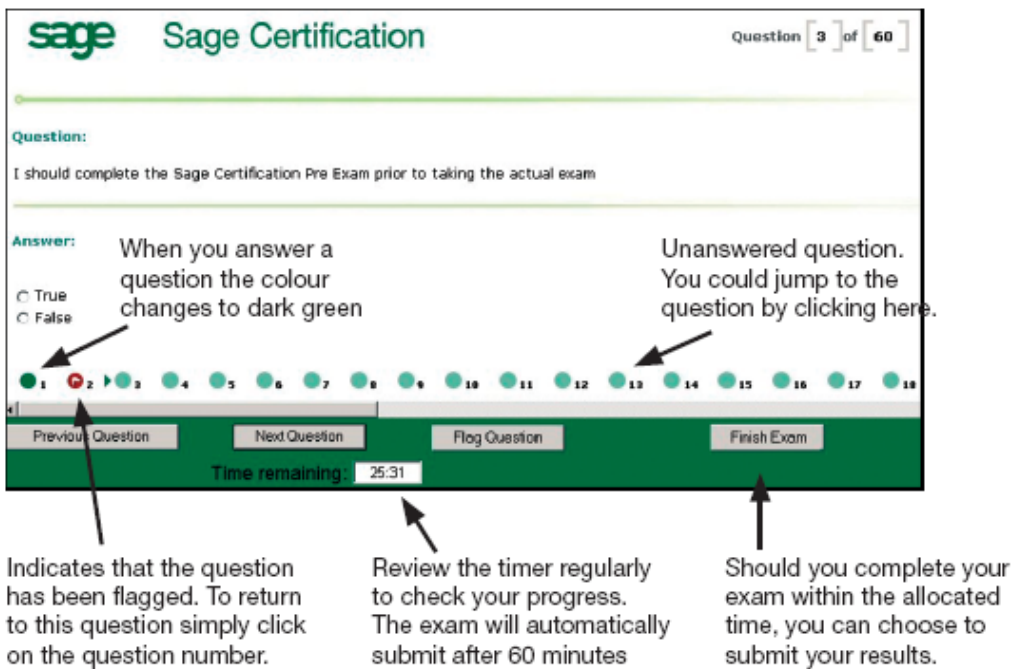
# Sage Certification exam

## Introduction

Once you have checked your browser settings, installed QMSecure and completed the Sage Certification pre exam, you are ready to take your actual exam. This section ensures you fully understand the screen layout, how to navigate and will assist you in reviewing the various question types presented during the exam.

## The Sage Certification Window

We hope you find the Sage Certification exam intuitive and easy to navigate. Prior to your exam, you should make yourself familiar with the various exam elements and screen layouts as follows:



## Question types

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During your exam you will be presented with various question types. It is essential that you understand the different question types and answer accordingly. Listed below are the question types you should expect to see.

### Multi choice

This is a multi choice question where you are only allowed to select one response.

To complete a multi choice question you need to click in the circle to the left of the answer that you think is correct.



#### Question:

Which of the following is known as the home to a rabbit?



#### Answer:

- Set
- Warren
- Nest
- Cave



You can identify multi choice questions as the answers are preceded by circles. You should therefore select the one correct answer.



## Multi response

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This is a multi response question where you are expected to select more than one answer. To complete a multi response question you need to click in the squares to the left of the answers you think are correct.

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### Question:

Which of the following ingredients are used to make a white cup of tea?

---

### Answer(s):

- Sand
- Tea bag
- Milk
- Water
- Baked Beans

You can identify multi response questions as the answers are preceded by squares. There may be more than one correct answer.

## True or false

This is a true or false question where you can only select one response. To complete a true or false question you need to click in the circle to the left of the answer you think is correct.

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### Question:

The capital city of North Korea is Pyongyang?

---

### Answer:

- True
- False

True or false questions simply offer you two choices. True/False

## Drag and drop

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This is a drag and drop question where you match images or text to respond. To complete a drag and drop question you need to use your mouse to drag answers and drop them alongside the correct match.

---

**Question:**

Drag and drop the matching parts to complete these popular TV programmes.

---

**Answer:**

Deal or	<input type="text"/>
Who Wants To Be	<input type="text"/>
I'm A Celebrity	<input type="text"/>
The X	<input type="text"/>

Drag the answers to the correct match

**Get Me Out Of Here** | **Factor** | **To Be A Millionaire** | **No Deal**

## Hot spot

This is a hot spot question where you must click on an area of a picture to respond. To complete a hot spot question you need to click on the area of the picture you think is correct.

---

**Question:**

Using the cross marker, select the symbol that represents the Euro.

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**Answer:**



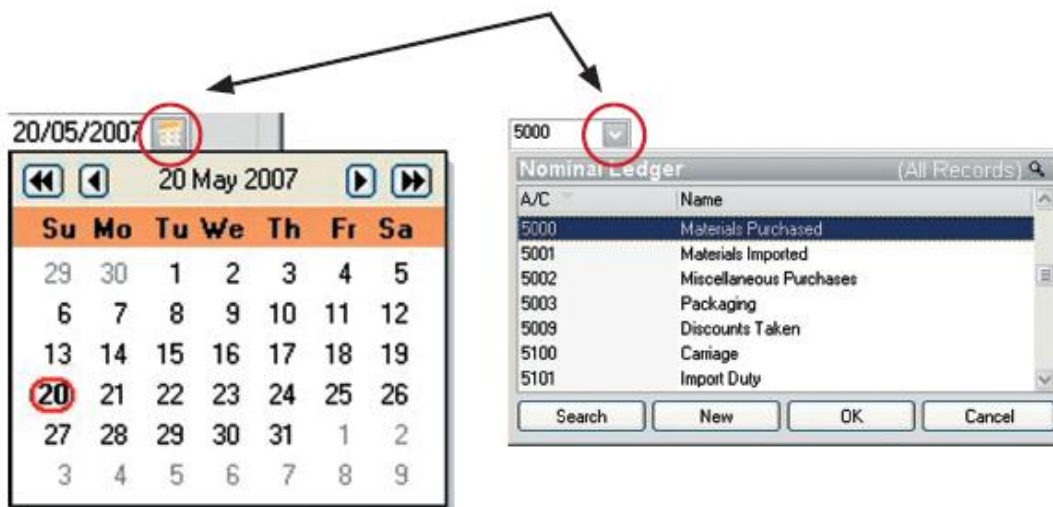
## Simulations

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To complete a simulation question you need to follow the same procedure as you would in the live version of the Sage software you are using.

However some key points to remember:

- You must navigate the simulation **using your mouse**.
- In most cases text fields will be entered for you. However when entering dates, VAT or Nominal Codes you should again use your **mouse**.



- You have **three attempts** to correctly answer each stage of the simulation. Should you exceed three attempts the simulation will end and you must move on to the next question.
- You can **only move forward** in each simulation and cannot revisit previous steps.
- Once a simulation is marked as "Simulation Complete" it cannot be re-attempted. It is **the only question type that cannot be re-attempted**.

## Exam results

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When you complete your exam you'll be asked to supply personal details in order for us to supply you with your feedback, score and should you be successful, your certificate.

You will receive notification of your exam results within ten working days and if you are successful, you will then receive your result and certificate through the post.

**Please note:** Sage employees cannot provide results by telephone. If you do not receive your exam results within ten working days, please report this to a member of our training administration team on: **0845 111 6666**

## What to do if you experience problems

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If you experience technical difficulties, you should call our web support team on **0845 111 5555**.



Sage's policy is one of constant development and improvement.  
We reserve the right to alter, modify, correct and upgrade our software  
programs and publications without notice and without incurring liability.

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