Access Accountants

Learning Catalogue

About

Access Accountants Learning covers a wide range of topics and modules designed to build your skills and keep you informed of changes in the Accounting world.

Delivery methods include self-paced guides and manuals, on-demand digital eLearning, and online seminars.

Whether you are a new or experienced user, there are training options to suit your needs, covering Foundational, Core, and Elective learning levels.

Access Practice Management

Access Ledger

Access Tax

ZAP Data Hub

Modules

In this catalogue, you will find learning modules available for the Access Accounting suite of products.

We constantly update and add to our offerings, so check back soon to see what's new!

| Foundational Learning | ▶ | Core Learning | ▶ | Elective Learning |

Learning Pathway

Our courses are developed to support your product enablement journey.

We start with the basics (Foundational) to familiarise you with the product before moving on to things that will help you with common daily tasks and workflows (Core).

Depending on the content, some courses will be geared towards a particular role or workflow type. We will suggest the best role types to complete the training, but ultimately, it's your learning journey! You have the freedom to decide.

We will soon offer elective content, which is designed for experienced product users to address more technical and advanced topics.
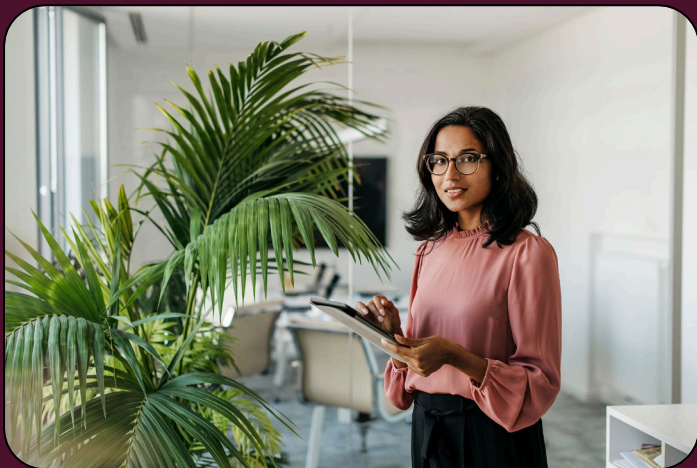
Learning Matrix
and Course Outlines

On the following pages, you will find details of available learning modules for each product, including the various workflows and topics covered.

We have provided a Learning Matrix to assist you in determining which roles would benefit the most from each course for your Accounting Practice.

Learning Matrix

Product	Courses	Learning Level	Workflows Covered	Suggested Roles			
				Reception and Admin	Systems Admin	Practice Manager	Accountant
Access Tax	Getting Started with Access Tax	Foundational	• Sign-in and Navigation	•	•	•	•
	Access Tax Core	Core	• Client Management • Practice Management • Reporting • Forms and Lodgments	•	•	•	•
Access Practice Management	Getting Started with Access Practice Management	Foundational	• Sign-in and Navigation • Data sync and integration	•	•	•	•
	Access Practice Management Core	Core	• Practice Management • Client Management • Reporting	•	•	•	•
Access Ledger	Getting Started with Access Ledger	Foundational	• Sign-in and Navigation • In-application features	•	•	•	•
	Access Ledger Workflow for Accountants	Foundational	• Navigation • Clients and Data • Data Preparation • Reporting	•	•	•	•
ZAP Data Hub	Getting Started with ZAP Data Hub	Foundational	• Navigation • Dashboards • Reporting		•		•
	ZAP Data Hub Webinar Series	Core	• Onboarding Entities • Reporting • Dashboards		•		•

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Getting Started with Access Tax

This digital eLearning course serves as an introduction to the Access Tax product.

Learning Level: Foundational

This course is designed to help new users sign in and navigate the Access Tax product.

Topics include:

- Introduction to Access Tax
- Setting up Multi-Factor Authentication
- First time login process
- Regular login procedure
- Resetting your password
- Basic navigation

Target audience
New users – all roles within an accounting firm.

Delivery method
This is an online training module.

Products covered
Access Tax and Multifactor Authentication options.

System requirements
Internet access and audio for video playback.

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Access Tax Core

This interactive eLearning course demonstrates how to use key features of Access Tax.

Learning Level: Core

This course is presented in four workflow modules focusing on Client Management, Practice Management, Reporting, and Forms and Lodgments.

Topics include:

General Product Training

- Introduction to Access Tax
- Product Navigation

Client Management Workflow

- Managing and Creating Users
- Adding Client Categories
- Editing Client information

Practice Management Workflow

- Practice Settings
- Creating a new practice

Reporting Workflow

- Filtering process
- Client Reporting
- Return Report Builder

Forms and Lodgments Workflow

- Starting a Tax Form
- Activity Statement Creation
- Lodgment Process
- Reporting overview
- ATO Reporting function

Target audience
New users. Learners can complete all workflow modules or select to complete only those relevant to their role.

Delivery method
This is an online training module.

Products covered
Access Tax and Multifactor Authentication options.

System requirements
Internet access and audio for video playback.

Getting Started with Access Practice Management

This digital eLearning course serves as an introduction to the Access Accountant Cloud product.

Learning Level: Foundational

This course is designed to help new users sign in and navigate the Standard Edition of the Access Accountant Cloud product.

Topics include:

- Introduction to the Salesforce platform and terminology.
- Sign-in and Reset Password
- Basic Product Navigation
- Basic Product Customisation

Target audience
New users – all roles within an accounting firm.

Delivery method
This is an online training module.

Products covered
Access Practice Management Standard.

System requirements
Internet access.

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Access Practice Management Core

This interactive course demonstrates how to use key features of the Access Practice Management product.

Learning Level: Core

This course is designed to help new users perform common workflows and tasks using the Access Practice Management product.

Topics Include:

- Your User Profile
- Homepage and Dashboard
- Client Management
- Communication
- List Views
- Calendar
- Tasks
- Pre-packaged Reports

Target Audience
New users – all roles within an accounting firm.

Delivery Method
This is an online training module.

Prerequisites
Completion of the Getting Started with Access Practice Management eLearning module.

Products Covered
Access Practice Management Standard and Professional.

System Requirements
Internet access.

Getting Started with ZAP Data Hub

This course introduces new users to ZAP Data Hub, including information on navigation and key features of the Compliance Reporting product version.

Learning Level: Foundational to Core

Learn how to navigate and perform key tasks in the ZAP Data Hub Compliance Reporting product.

Topics Include:

- Compliance Reporting Introduction
- Navigation
- Import to HandiLedger (MYOB AR and Xero)
- Onboarding Accountant Solution Entities
- External Data Source Reports
- Importing Data Hub Entities into HandiLedger

Target Audience
New ZAP Data Hub users with an existing understanding of accounting principles.

Delivery Method
This is an online training module.

Products Covered
ZAP Data Hub (Compliance Reporting).

System Requirements
Internet access and audio for video playback.

ZAP Data Hub Webinar Series

The ZAP Data Hub Webinar Series focuses on onboarding entities, understanding the functionality of Dashboards and creating and using Reports.

Learning Level: Core

This course contains three webinar recordings and supporting documentation.

Topics include:

Onboarding Entities

- Product Navigation Accountant Solution
- Changing roles: administrator or consumer access
- Importing information into Data Hub from a third-party entity
- Importing information from Data Hub to HandiLedger
- Importing information from Data Hub to Final Accounts

Dashboards

- Report Dashboard function
- Navigating and adding new
- Dashboards
- Slicing
- Requesting updates from Income Tax Lodgments

Creating and Using Reports

- Report Pack
- Creating new Reports
- Navigating Reports
- Smart filtering
- Scheduling an Event
- Rich text
- The Data Hub Publication Rule

Target Audience
New ZAP Data Hub users with an existing understanding of accounting principles.

Delivery Method
This is an online training module.

Products Covered
ZAP Data Hub (Compliance Reporting and Compliance Analytics).

System Requirements
Internet access and audio for video playback.

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Getting Started with Access Ledger

This digital eLearning course serves as an introduction to the Access Ledger product.

Learning Level: Foundational

This course is designed to help new users sign in and navigate the Access Ledger product.

Topics include:

- First Time Sign in and Multifactor Authentication
- Regular Sign in procedure
- Product navigation
- In-Product support and guidance
- Roles and workflows

Target audience
New users – all roles within an accounting firm.

Delivery method
This is an online training module.

Products covered
Access Ledger and Multifactor Authentication options.

System requirements
Internet access and audio for video playback.

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Access Ledger Workflow for Accountants

The Access Ledger Workflow for Accountants focuses on key activities performed at each stage of the product workflow.

Learning Level: Foundational

This course is designed to help new users understand key activities and sequencing to support the Access Ledger product workflow.

Topics include:

Navigation

- User Interface overview
- Support and how-to guides

Data Preparation

- Data and preparation
- Asset management

Clients and Data Import

- Creating a new client group
- Creating a new entity
- Importing data using Excel

Reporting

- Generating reports
- Customising reports
- Exporting reports

Target audience
New users – all roles within an accounting firm.

Delivery method
This is an online training module.

Products covered
Access Ledger.

System requirements
Internet access and audio for video playback.

End of Financial Year 📅

Let us help you prepare for EOY through our annual Tax Event and supporting product module!

Each year, we join forces with leading tax experts to bring you the latest changes affecting the accounting industry during the **Access Annual Tax Event**, featuring:

- Major developments and changes in tax legislation and ATO approaches

- Tax planning opportunities prior to year-end

- Recap of the Federal Budget

- Key industry updates and activities

Our EOY Product Update provides important tax form updates and changes to the HandiSoft Desktop and Cloud suite of products, along with handy tips and resources to prepare and support you in the lead-up to tax season.

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Thank you for exploring Access Accountants Learning!

For further information, please get in touch with our team at
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