

Training Needs Analysis Form

Sage Instant Accounting



Please take a few moments to complete this form. It will help us to determine your current skill level and design a tailored training programme to suit. Please be honest and accurate with your answers. Thank you.

Name:	
Company:	
Department:	

Have you used Sage Instant Accounting before?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If yes, which version of Sage Instant Accounting have you used? Please specify:			
How would you rate your skill level with Sage Instant Accounting?	<input type="checkbox"/> Beginner	<input type="checkbox"/> Intermediate	<input type="checkbox"/> Advanced
If you have not used Sage Instant Accounting, have you used any other computerised accounting package before? Please specify:			
If you have used accounting software before, which of the following functions have you performed?	<input type="checkbox"/> Sales and Purchase Ledgers	Bank account postings and reconciliations	<input type="checkbox"/> Nominal Ledger & Reporting

Task	How would you rate your knowledge of this task?			If none or minimal would you like to know more?	
	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Working with Windows and the mouse	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Creating and amending customer records	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recording batch sales invoices and credit notes	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Generating invoices and credit notes from Sage	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Using the credit control features & applying Late Payment charges	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Generating customer statements, letters and mailing labels	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Creating and amending supplier records	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recording purchase invoices and credit notes	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Creating Nominal account records	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Tailoring the Chart of Accounts	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Posting journal entries	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recording receipts, payments, bank transfers & recurring entries	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Reconciling the bank accounts	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Creating product categories and records	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Producing financial reports	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Completing the VAT return using Sage	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
File maintenance and period end routines	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Backing up and restoring accounting data	<input type="checkbox"/> None	<input type="checkbox"/> Minimal	<input type="checkbox"/> Good	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are there any other topics, not shown above, which you would specifically like covered? Please specify:					