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Access HandiSoft

Learning Catalogue

About

Access HandiSoft 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 training manuals, on-demand digital eLearning, and online seminars.

Whether you are a new or experienced user, there are training options to suit your needs.

Access HandiTax

Access HandiLedger

Access Time+Billing

Access HandiRegister

Access Document Manager

Access Practice Manager

Access Workpapers

Access SuperFund

Access HandiTrust

Modules

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

Course Outlines

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Access HandiTax Digital Learning

This digital learning course includes over 30 video snippets, introducing you to the key features of the Access HandiTax product.

This course is designed to help new users configure, navigate, and complete key workflow tasks using the Access HandiTax product.

Topics include:

- Configuration
- Navigation
- Function keys and shortcuts
- Adding a client
- Preparing a tax return

- ATO Prefill
- Data entry, including salary, wages, capital gains, rental statement, depreciation, PAYG and HECS, and Trust distributions
- Company returns

- Correcting errors
- Lodgment
- Reporting
- Asset pooling
- Activity statements

Target audience
New users with an existing understanding of accounting principles.

Delivery method
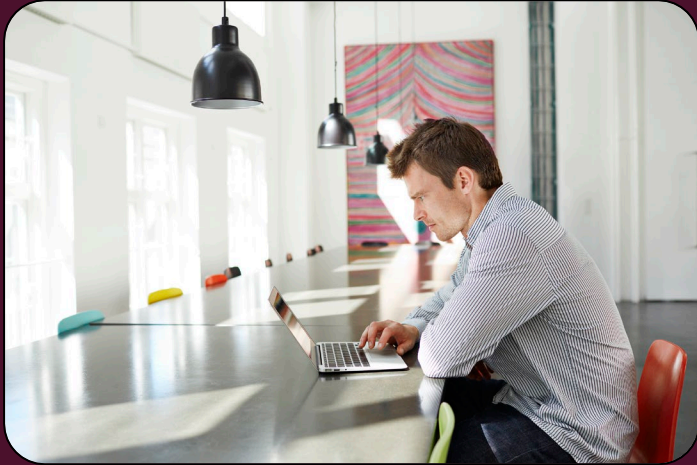This is an online training module.

Products covered
Access HandiTax.

System requirements
Internet access and audio for video playback.

Estimated duration
1.5 Hours.

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Access HandiLedger Digital Learning

This digital learning course includes over 25 video snippets, helping you get the most from the Access HandiLedger product.

This course is designed to help new users navigate and complete key workflow tasks using the Access HandiLedger product.

Topics include:

- Setting up clients
- Understanding Account Ranges
- Chart of Accounts
- Entering comparative data
- Entering bank statements and journals

- ASCII Import – BankLink
- Entering recurring transactions
- Transactions and ledger entries
- Running trial balances and correcting errors
- Suspense account

- Recording stock
- Depreciation including asset pools and automatic journal
- Activity Statements
- Reporting
- Closing a year

Target audience
New users with an existing understanding of accounting principles.

Delivery method
This is an online training module.

Products covered
Access HandiLedger.

System requirements
Internet access and audio for video playback.

Estimated duration
1.5 Hours.

Access Practice Manager Digital Learning

This digital learning course introduces you to the Access Practice Manager and Jobflow Manager products.

This course is designed to help new users navigate, customise, and complete key workflow tasks using the Access Practice Manager and Jobflow Manager products.

Topics include:

- Navigation
- View customisation
- Client notes
- Additional databases
- Creating clients, user information, and offices
- Deleting and resigning users

- Changing client types
- Diary customisation and events
- To do lists
- Transferring to Time+Billing
- User diaries and group planner
- Leave set up/annual leave planner
- Event reports

- Mail merging
- Practice Manager security
- Jobflow Manager functionality
- Jobflow Manager resource allocation
- Jobflow Manager and Time+Billing integration.

Target audience
New users.

Delivery method
This is an online training module.

Products covered
Access Practice Manager, Jobflow Manager, and Time+Billing.

System requirements
Internet access and audio for video playback.

Estimated duration
2 Hours.

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Access Document Manager Digital Learning

This digital learning course serves as a comprehensive introduction to the Access Document Manager module.

This course is designed to help new users navigate and complete key workflow tasks using the Access Document Manager product.

Topics include:

- Navigation
- Customising the view
- Cabinet, drawer, and folder structures
- Firms, prospective, and user filing cabinets
- Adding documents
- Microsoft Office add-in

- Naming conventions
- Creating a new document
- Mail merging
- Mail merging from HandiTax
- Saving documents from other Access HandiSoft products
- Collating and emailing documents

- Collating and emailing documents
- Network and local scanning
- Auto-filing using OCR (optical character recognition)
- Documents tab
- Saving, searching, and sharing documents

Target audience
New users.

Delivery method
This is an online training module.

Products covered
Access Document Manager and HandiTax.

System requirements
Internet access and audio for video playback.

Estimated duration
1 Hour.

Access Workpapers Digital Learning

This digital learning course serves as an introduction to the Access Workpapers module.

This presentation will introduce you to Workpapers and how to use the templates that are available, as well as show you how to attach your own documents to account balances.

Topics include:

- Navigation
- Completing forms
- Adding supporting documents

- Updating the status of an account
- Removing unwanted forms
- Finalising workpapers
- Creating a template

Target audience
New users with an existing understanding of accounting principles.

Delivery method
This is an online training module.

Products covered
Access Workpapers.

System requirements
Internet access and audio for video playback.

Estimated duration
30 Minutes.

Access HandiTrust Guide

This training manual serves as an introduction to the Access HandiTrust product.

This manual is designed to guide new users through the Access HandiTrust product.

Topics include:

- Navigating HandiTrust
- Selecting the ruling body
- Creating the firm
- Setting up the bank account
- Entering client and firm opening balances
- Creating authorities

- Journals
- Client receipts
- Service fees
- Client payment
- Setting up EFT
- ATO Refunds
- Client cards and firm payments

- HandiTax assessment notice
- Front cover defaults
- Creating an ABA file
- Bank reconciliation
- Reports
- Customising letters and letterhead

Target audience
New users with an existing understanding of accounting principles.
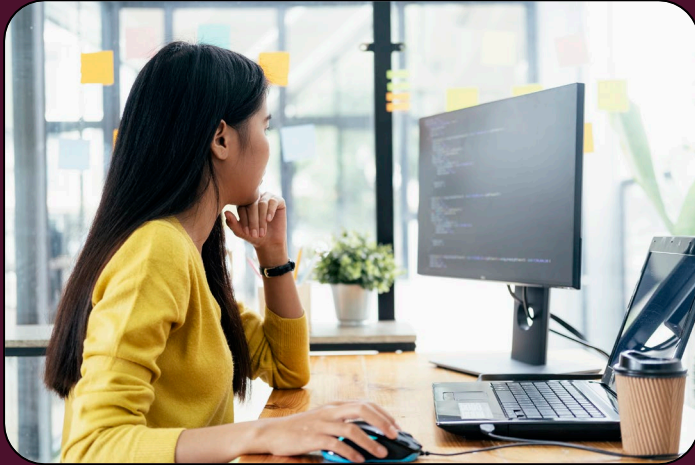
Delivery method
A Training manual.

Products covered
Access HandiTrust.

System requirements
Internet access.

Access SuperFund Guide

This training manual serves as an introduction to the Access SuperFund product.

This manual is designed to guide new users through the Access SuperFund product.

Topics include:

- Setting up a Self-Managed Superfund
- Entering Superfund transactions
- Managing investments
- Pensions

- Reviewing tax calculations
- Closing a SuperFund year
- Transferring from Access SuperFund to HandiTax
- Administration troubleshooting
- Administration shortcuts

Target audience
New users with an existing understanding of accounting principles.

Delivery method
A Training manual.

Products covered
Access SuperFund.

System requirements
Internet access.

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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 HandiSoft Learning!

For further information, please get in touch with our team at
apac.learningservices@theaccessgroup.com.