

INTSYS

Courses & Certifications

Pegasus Software



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Why become Certified?

- **Increase your knowledge of the software**
- **Enhance practical abilities to optimise processing**
- **Gain recognition for technical competency**

Benefits

Work with Pegasus Accredited Trainers

Every Trainer at Intsys UK is fully accredited by Pegasus Software.

Invest in your Staff to improve productivity

The skills obtained during a training session will reduce time spent processing and will eliminate the unnecessary frustration when using the system.

Practical skills are challenged in the session

Unlike a classroom session, Intsys provide the environment to engage in a conversational-style seminar, with time set aside to practise on demo or company data.

Secure Staff access to the Intsys Telephone Support Line

A new Staff member can be allocated immediately to your Telephone Support Agreement as soon as they have received a certified training session. This initial investment has been proven to improve company revenue by reducing the user's time spent processing and querying processing issues with the software.

Each course is structured with the user in mind

Every course will have a structure designed to leave no stone unturned but also tailored to the user's job role to ensure they can process immediately in the software.

On-Premise

Provided your offices are located within a commutable distance to Intsys UK we will conveniently travel to your doorstep and utilise any room or devices you wish to enhance the session.


Wimbledon Training Suite

If you prefer a classroom-style course then request for your session to be held at our Training Suite located in Wimbledon Park, London.

Over the Web


Log-in to our training courses globally via our online meeting centre. Our web sessions are just as interactive as the classroom and more convenient!

Course Duration



Half day courses are provided—each session is **three hours in duration**.
Morning courses: 9:30am
Afternoon courses: 2:30pm

Rates



Our courses start from **£133 per person**.

Courses

All sessions are available at Introductory, Intermediate and Advanced Levels. We recommend at least one session to be taken per module of Opera and three sessions for XRL.

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Financials 3 Days

Our Full Financials Training Course includes Nominal, Sales, Purchase, Cashbook, Fixed Assets and Costing. Alternatively, mix and match the modules to suit your business at half a day (3 hours) per module.

Nominal Ledger

This training course is designed to provide a complete overview of how to process in the Nominal Ledger.

It would be an advantage if users attending have a general knowledge of standard UK Accounting requirements.

By attending this course you will learn:

- how to analyse your chart of accounts, utilise cost centres and create journals
- advanced nominal ledger analysis levels and detailed view screen reporting
- how to set periodic budgets and revised budgets
- the module integration with financial and payroll applications
- open period accounting practises and how to tailor your month end procedures.

Sales Ledger

This course is ideal for all staff members working within the Sales ledger.

The Credit Management Centre can be taken as a separate session if requested.

By attending this course you will learn:

- how to create customer accounts with specific terms profiles
- printing debtors reports and utilising detailed sales view screen reporting
- how to use the allocation and rectify allocation routine
- currency in the sales ledger
- defining sales periods and period end procedures
- the Credit Management Centre.

Purchase Ledger

This course is ideal for all staff members working within the Purchase ledger.

By attending this course you will learn:

- how to create supplier accounts with specific terms profiles
- printing creditors reports and utilising detailed purchase view screen reporting
- how to use the allocation and rectify allocation routine
- currency in the purchase ledger
- PIR processing
- defining purchase periods and period end procedures.

Fixed Assets

This course is ideal for all staff members working within the Fixed Assets module with working knowledge of asset depreciation.

By attending this course you will learn:

- how to create assets
- defining the coding and details of an asset
- importing assets and overriding details
- opening balances and revaluation
- asset depreciation
- custom fields and locations
- period end procedures.

Costing

This course is ideal for all staff members working within the Job Costing module with prior knowledge of project planning and accounting.

By attending this course you will learn:

- estimate and contract creation
- job budgets
- cost types and rates
- applying costs, budgets and revenue
- frameworks and job phasing
- contract currency
- integration with other modules.

Cashbook

This training course is designed to provide a complete overview of how to process in the Cashbook.

It would be an advantage if users attending have a general knowledge of standard UK Accounting requirements.

By attending this course you will learn:

- how to create bank accounts and cashbook types
- linking your data to the sales, purchase and nominal ledgers
- reconciling your bank accounts
- batch processing and recurring payments
- sales, purchase and nominal postings
- multi-currency
- month end procedures.

Book a Course

Please email your name, company, course title/s and number of attendees to training@intsysuk.com or call 020 8605 9700.

Supply Chain Management

2 Days

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Our full Supply Chain Management Training Course includes SOP, POP, Stock and Bills of Materials. Alternatively, mix and match the modules to suit your business at half a day (3 hours) per module.

Sales Order Processing

This course is ideal for all staff members who interact with the generation of documents relating to Invoicing.

By attending this course you will learn:

- how to process contract documents
- creating proformas, quotations, sales orders, delivery notes, invoices and credit notes
- batch processing and repeat invoicing
- customer and special price lists
- back-to-back processing.

Purchase Order Processing

Any staff involved in raising PO's and receiving goods would greatly benefit from this session.

By attending this course you will learn:

- creating and authorising requisitions and live PO's
- raising POs and receiving goods
- PIR processing matching to PO's
- editing documents and PO reporting
- committing PO's and how this affects stock.

Stock Ledger

This is the ideal session for Staff involved in the management of Stock and Warehousing.

By attending this course you will learn:

- how to create a stock item
- stock categories and profiles
- serial number tracking and batch processing
- stock receipts, issues and adjustments
- detailed stock ledger view screen reporting
- multi warehousing.

Bill of Materials

This is the ideal session for Staff involved in the management of Stock.

By attending this course you will learn:

- how to create components, assembly and sub-assembly items
- labour and miscellaneous items
- creating, editing BOM's and using the works order process
- understanding costing with BOM's and the link with stock.

Customer Relationship Management

1.5 Days

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Our full Customer Relationship Management Training Course includes SPM, Service and Helpdesk Management. Alternatively, request a specific course at half a day (3 hours) per module.

Sales Pipeline Management

For all Sales and Financial staff that have an understanding of Sales Pipelines and Customer Management, this session will greatly benefit how Prospects and Clients are managed by going through the extensive features of Opera 3 SPM.

By attending this course you will learn:

- how to create prospects, customers and competitors
- adding internal and external contacts to companies and sites
- how to create and manage sales opportunities
- to set activities and tasks for yourself and colleagues/members of staff
- managing contact groups, mail merge and bulk email
- interaction with Microsoft Office
- linking quote to the Opera 3 SOP module
- reporting from the sales pipeline.

Service Management

Ideal for users whose job role includes project planning and processing.

By attending this course you will learn:

- project and stock processing
- how to create and manage service contracts and customer service level agreements
- contract equipment registers
- running mail merge and bulk email
- project reporting
- linking to the Opera 3 SOP module and raising invoices.

Helpdesk Management

This course is ideal for all staff members who utilise Helpdesk Management.

By attending this course you will learn:

- how to raise, assign and maintain helpdesk issues
- setting helpdesk tasks and assigning technician schedules
- service level agreements and linking the helpdesk to the service contracts
- reporting from the helpdesk, mail merge and bulk email
- how the module interacts with Microsoft Office.

Payroll & HR 2 Days

Our Full Payroll & HR Training Course includes Payroll at introductory, intermediate and advanced levels with a dedicated Personnel course available. Alternatively, request a specific course at half a day (3 hours) per module.

Introduction to Payroll

This course is designed for new users of Payroll or users wishing to improve existing skills.

By attending this course you will learn:

- an overview of Opera 3 Payroll and running Payroll from start to finish
- printing payslips and end of period reports
- payment, deduction and employee profiles
- the settings in your payroll module
- Pegasus HMRC Online Filing Manager.

Intermediate Payroll

We recommend that experienced users attend this course to refine their advanced processing.

By attending this course you will learn:

- advanced SMP, SPP, SSP processing
- SSP absence calendars
- how the Payroll Module interacts with the Nominal Ledger
- how the Payroll Module links with the Cashbook and other modules
- attachment orders and overriding PAYE and Tax
- P32 Processing and Pegasus Online Filing Manager.

Advanced Payroll

This course is designed with Payroll/HR Managers and Directors in mind.

By attending this course you will learn:

- Payroll Module integration with other modules and XRL Reporting
- Payroll year end and month end procedures
- setting user rights
- Payroll view reporting and exporting information to MS Excel
- integration with the Personnel Module.

Personnel

This course is ideal for all staff members processing in the Personnel module.

By attending this course you will learn:

- how to create and maintain employee records with details such as absenteeism and salary
- using the Benefits section to record information required for the P11D
- how to utilise individual employee diaries to view work and holiday patterns
- integration with the Payroll Module
- setting up defined lists for employees such as job titles and marital status'.

Pegasus XRL 1.5 Days

Our full XRL Training Course includes and introduction to the product, intermediate reporting and advanced training/consultancy for senior staff. To book separately it is half a day (3 hours) per session.

Introduction to XRL

This course is essential for all first time users of XRL as it will cover the core facilities to extract data from your financial system to manipulate as required.

By attending this course you will learn:

- how to create reports and links
- simple profit & loss report and balance sheet
- creating on-screen criteria
- macro buttons
- combining multiple links and reports
- chart of accounts and data tables
- techniques to better report.

Intermediate XRL

For Users feeling confident with XRL this course will enhance the ability to create advanced reports using the extensive functionality of XRL and Excel.

By attending this course you will learn:

- using the report layout designer
- adding automatic sub totalling
- conditional formatting
- pivot tables
- cube analysis
- user defined fields.

Advanced XRL

This bespoke session is ideal for Finance Managers and Directors who are looking for unique reporting capabilities and it is essential for users attending the course to have thorough knowledge of XRL.

- **The course format is agreed on a case-by-case basis. Please speak to a member of the team via consultancy@intsysuk.com for more information.**

System Management 0.5 Days

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Our System Management Training Course is highly recommended for the main user of Opera. It covers vital instructions on how to maintain a healthy system and process safely as a company.

This training course is designed to provide a complete overview of the Administration module of Opera and the processes that can be used to ensure safe and undisturbed processing.

By attending this course you will learn:

- user preferences
- maintenance
- backups/restore
- update data structures
- view event log and monitor users
- user profiles and groups
- scheduling—messaging and shutdown.

Book a Course

Please email your:

- Name
- Company
- Course title/s
- No. of attendees

to training@intsysuk.com.

Alternatively, call us on
+44(0)20 8605 9700