XCELERATE TRAINING INSTITUTE

your learning & development partner

ACCOUNTING & FINANCE

Financial record management and tracking with financial softwares Training Course

DURATION	LANGUAGE	FORMAT
5 days	English	Classroom / Online

Upcoming dates

Dates	Venue	Format	Fee
12 – 16 Apr 2027	Live online	Online (live)	On request
18 – 22 Oct 2027	Live online	Online (live)	On request
15 – 19 Nov 2027	London	Classroom	€5,500

Register or ask a question

Online: x8ti.com/course/financial-record-management-and-tracking-with-financ…

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Financial record management and tracking with financial softwares Training Course

Introduction

This course by Xcelerate Training Institute provides comprehensive knowledge and skills to effectively manage financial records and budgets. It covers essential topics such as accounting principles, financial statements, financial reporting, and the use of financial software applications, including advanced Excel. By the end of the course, students will be equipped to handle financial records and budget tracking for any organization and proficient in using essential financial software.

Learning Objectives

Upon completing this course, participants will be able to:

- Understand the principles of financial record keeping, including accounting, financial statements, and financial reporting.
- Develop proficiency in financial record management, including documentation, filing, record retention and disposal, and creating management policies.
- Learn best practices for maintaining accurate and secure financial records, in line with legal requirements.
- Apply financial record management skills in real-world scenarios through case studies and practice exercises.

Training Methodology

This collaborative training program includes:

- Face-to-face interactions
- Presentations
- Case studies and work groups
- Individual and group experiential learning activities
- Audio/Video presentations and questionnaires
- Role plays Following the ‘Do-Review-Learn-Apply’ model.

Benefits for Your Organisation

Organizations can benefit from:

- Enhanced management of financial records and budget tracking.
- Improved accuracy and security of financial records, reducing risks and errors.
- Effective use of financial software applications to streamline processes.
- Professional development of employees, leading to increased efficiency and productivity.

Benefits for You

Participants will gain:

- Comprehensive understanding of financial record keeping principles and practices.
- Practical skills in managing financial records, including documentation, filing, and retention.
- Knowledge of best practices for financial record maintenance and security.
- Experience applying financial record management skills in real-world scenarios.
- Proficiency in using financial software applications, including advanced Excel.

Who Should Attend

This course is ideal for:

- Finance professionals seeking to enhance their record management skills.
- Accountants and financial analysts looking to improve their proficiency with financial software.
- Managers and supervisors responsible for overseeing financial records and budgets.
- Individuals seeking to develop a strong foundation in financial record keeping and management.

Course Outline

Introduction to Financial Record Management

- The importance of financial record management
- Types of financial records and software
- Legal requirements for financial record keeping
- Digitization and fast tracking

Financial Record Management

- What is financial and grant record management?
- Types of financial records and document classification
- Financial reporting standards and accuracy
- Audit reports
- Internal financial reporting
- Digitization for financial spot checks and audits
- Record-keeping best practices
- Documentation and filing
- Record retention and disposal
- Record management policies and procedures

Financial Software Applications

- Using financial software for record management
- Advanced Excel for financial recording and reporting
- Other software: Oracle NetSuite and Workiva
- Data security and backup

Case Studies and Practice Exercises

- Real-life case studies
- Practice exercises
- Discussion and analysis of results

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Registration Form

Financial record management and tracking with financial softwares Training Course

Preferred dates: ..... Venue or online: .....

Duration: 5 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Email: .....

Payment

☐ Please invoice me ☐ Please invoice my company

Signature: ..... Date: .....

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Email this form
info@x8ti.com

Register online
Open the course page