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# End User Home and Small Business

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This document outlines what modules are covered through the “End User Home and Small Business” programme accessible through Walker Hall Associates. Walker Hall Associates have been providers of training solution to both corporate and individual users for more than 15 years and during this time we have continually improved and expanded the courses available to satisfy the needs of our customers.

The End User Home and Small Business programme is perfect for Small Office Home Office (SOHO) workers needing high-quality, low-priced training on topics such as office management, accounting and budgeting. A more detailed outline of the course is covered in this document.

Online learning does offer a wide range of benefits to the user and is recognised as a convenient and engaging method of delivery.

Why not visit our website ([www.whanet.co.uk](http://www.whanet.co.uk)) where you can view a presentation on the benefits of e-learning for both businesses and individuals. You can also access a sample of our courses to see for your self if e-learning is for you.

### Budgeting and Saving Series

**Total Time: 21 hours**

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#### **Budgeting and Saving: Confronting Debt** **3 hours** **BUDG01**

*Budgeting and Saving: Confronting Debt provides a guide to assessing personal debt, formulating a budget, and maintaining a good credit rating.*

- Assessing Your Debt
- Understanding Your Credit Rating
- Creating a Budget
- Maintaining Good Credit

#### **Budgeting and Saving: Eliminating Debt** **3 hours** **BUDG02**

*Budgeting and Saving: Eliminating Debt provides a guide to eliminating personal debt and rebuilding damaged credit.*

- Understanding Credit Cards
- Getting Out from Under Debt
- Developing Smarter Credit Habits
- Rebuilding Damaged Credit

#### **Budgeting and Saving: Banking Basics** **3 hours** **BUDG03**

*Budgeting and Saving: Banking Basics explains basic principles of consumer banking.*

- Avoiding Fees and Service Charges
- Finding Better Rates
- Understanding Rates
- Considering Banking Options

#### **Budgeting and Saving: Choosing Bank Accounts** **3 hours** **BUDG04**

*Budgeting and Saving: Choosing Bank Accounts explains how to choose checking accounts, savings accounts and certificates of deposit, and provides an introduction to online banking.*

- Understanding Checking Accounts
- Choosing Savings Accounts and CDs
- Choosing a Checking Account
- Banking Online

#### **Budgeting and Saving: Planning Your Retirement** **3 hours** **BUDG05**

*Budgeting and Saving: Planning Your Retirement provides an introduction to long-term investment strategy.*

- Becoming an Informed Investor
- Planning for Retirement
- Planning Your Investments
- Cashing In at Retirement

***Budgeting and Saving: Making 401(k) Plans Work for You***

**3 hours**

**BUDG06**

*Budgeting and Saving: Making 401(k) Plans Work for You explains how to take advantage of 401(k) saving plans.*

- Understanding 401(k) Plans
- Maximizing Your 401(k) Benefits
- Saving Over the Long Haul

***Budgeting and Saving: Exploring Investment Options***

**3 hours**

**BUDG07**

*Budgeting and Saving: Exploring Investment Options provides a guide to investing in stocks and explains other investment options including bonds, mutual funds, and government investments.*

- Investing in Stocks
- Investing in Bonds and Mutual Funds
- Investing with the Government

# Estate Planning Series

**Total Time: 36 hours**

## ***Estate Planning: Starting an Estate Plan***

**4 hours**

***EPLC01***

*Estate Planning: Starting an Estate Plan provides an introduction to the terms and resources needed to begin preparing an estate plan.*

- What Is an Estate?
- Looking Ahead
- Getting Started
- Taking Inventory
- Joint Property

## ***Estate Planning: Sorting Out Your Assets***

**4 hours**

***EPLC02***

*Estate Planning: Sorting Out Your Assets provides an overview of some of the most common types of estate assets.*

- Life Insurance
- Determining Coverage
- Pension Plans
- Other Ways to Save
- Your Business and Your Estate
- Other Business Considerations

## ***Estate Planning: Preparing Your Will***

**4 hours**

***EPLC03***

*Estate Planning: Preparing Your Will provides an introduction to wills and trusts.*

- Why Have a Will?
- The Simple Will
- Distributing Your Assets
- Introduction to Trusts
- Trusts and Wills
- Living Trusts

## ***Estate Planning: All About Probate***

**4 hours**

***EPLC04***

*Estate Planning: All About Probate provides an overview of probate and probate court.*

- Landing in Probate
- The Executor
- Keeping Probate Costs Down
- Special Probate Situations

## ***Estate Planning: Considering Your Family***

**4 hours**

***EPLC05***

*Estate Planning: Considering Your Family provides information on the inheritance rights of spouses and children, and ways to prevent challenges to a will.*

- Choosing a Guardian
- Managing Your Child's Assets
- Your Spouse's Rights
- Divorce and Its Consequences
- Challenging a Will
- Things to Avoid

**Estate Planning: Taxes to Expect****4 hours****EPLC06**

*Estate Planning: Taxes to Expect provides information on federal, state, and gift taxes, and how they affect an estate.*

- Federal Estate Taxes
- Calculating Tax Deductions
- Gift Taxes
- Gifts and Their Consequences
- State Taxes
- Other Taxes to Consider

**Estate Planning: Tax Strategies****4 hours****EPLC07**

*Estate Planning: Tax Strategies provides strategies for keeping estate taxes down to a minimum.*

- Charitable Donations
- More Ways to Donate
- Income Tax Savings
- Taxes and Your Will
- Benefits to Your Family
- Distributing Your Assets

**Estate Planning: Retirement Issues****4 hours****EPLC08**

*Estate Planning: Retirement Issues provides strategies for preparing for retirement and other elder issues within the estate plan.*

- Social Security
- Other Retirement Benefits
- Preserving Your Assets
- Health-Related Issues
- Final Considerations

**Estate Planning: Revising an Estate Plan****4 hours****EPLC09**

*Estate Planning: Revising an Estate Plan provides strategies for revising an estate plan throughout life.*

- Elder Issues
- Other Estate Plan Considerations
- Strategies for the Single Person
- Planning throughout Your Life

# Home Business Series

**Total Time: 16 hours**

## **Home Business: Choosing a Business**

**4 hours**

**HBBC01**

*Home Business: Choosing a Business provides an overview of the options in creating a new business from home, buying a franchise, buying an existing business, or joining a partnership.*

- Weighing the Options
- Choosing the Right Business
- Creating a Business Concept
- Franchises
- Buying Someone Else's Business
- Joining Other Existing Businesses
- Solo Ventures versus Partnerships
- Forms of Corporations

## **Home Business: Raising Financing**

**4 hours**

**HBBC02**

*Home Business: Raising Financing explains how to create a business plan and raise the money to support the plan.*

- Creating a Business Plan
- Supporting Your Financial Plan
- Making Ends Meet
- Raising Money
- Using Personal Resources for Funds
- Borrowing Funds

## **Home Business: Office Management**

**4 hours**

**HBBC03**

*Home Business: Office Management explains how to set up and manage an office at home.*

- Zoning and Creating an Office
- Phone Lines and Options
- Choosing Office Equipment
- Marketing Your Business
- Advertising on a Shoestring
- Invoicing and Payments
- Hiring Assistants
- Being an Employer
- Insurance

## **Home Business: Managing Your Business**

**4 hours**

**HBBC04**

*Home Business: Managing Your Business explains how to run a home business, including such topics as keeping books and dealing with taxes.*

- Keeping Books
- Paying Taxes
- Tax Write-Offs
- Tax Deductions
- Taking Time Away from Work
- Presenting a Professional Image
- Keeping In Touch with the Outside World

# Interview Skills Series

**Total Time: 36 hours**

## **Interview Skills: Getting the Interview**

**4 hours**

**ITVC01**

*Interview Skills: Getting the Interview shows users how to find the right job openings and get an invitation to an interview.*

- Interview Myths and Reality
- Solving the Employer's Every Problem
- Creating Your Skill List
- Researching Companies and Positions
- Making Interviews Happen

## **Interview Skills: Preparing Yourself**

**4 hours**

**ITVC02**

*Interview Skills: Preparing Yourself shows users how to prepare for an interview, from the time they receive the request for the interview to the night before.*

- Getting the Call for an Interview
- Putting Everything Together
- Dressing for Interviewing Success
- Wardrobe Notes for Men and Women

## **Interview Skills: Making an Entrance**

**4 hours**

**ITVC03**

*Interview Skills: Making an Entrance talks users through arriving at an interview and establishing a connection with the interviewer.*

- Between Your Door and Theirs
- Dealing with Nervousness
- Making a Good First Impression
- Establishing a Connection

## **Interview Skills: Listening & Answering**

**4 hours**

**ITVC04**

*Interview Skills: Listening & Answering shows users how to actively listen to the interviewer and answer the most common interview questions with the solutions that the interviewer needs.*

- Dynamic Listening
- Focusing Your Efforts and Judging Reactions
- Demonstrating Your Skills
- Employment and Salary Questions
- Problem-Solving and Historical Questions
- Unusual and Inappropriate Questions

## **Interview Skills: Taking the Reins**

**4 hours**

**ITVC05**

*Interview Skills: Taking the Reins shows users how and when to steer an interview, and how to handle salary negotiations.*

- Steering the Interview
- Dealing with the Individual
- Talking about Money
- Negotiating Your Pay check



### **Interview Skills: Asking Questions**

**4 hours**

**ITVC06**

*Interview Skills: Asking Questions shows users how to ask questions in an interview that will provide needed information as well as demonstrate preparedness for the job.*

- Questions to Always Ask
- Questions about the Job
- Questions That Show Your Vision
- Questions for Different Professions

### **Interview Skills: Opening Interviews**

**4 hours**

**ITVC07**

*Interview Skills: Opening Interviews shows users how to generate opening interviews for themselves and how to handle gatekeeper and telephone interviews designed to weed out unsuitable candidates.*

- Getting an Informational Interview
- The Informational Interview
- Passing a Gatekeeper Interview
- Giving the Gatekeepers What They Need
- Preparing for a Telephone Interview
- The Telephone Interview

### **Interview Skills: Tough Interviews**

**4 hours**

**ITVC08**

*Interview Skills: Tough Interviews show users how to handle difficult interviews, including group interviews, performance tests, and stress interviews.*

- Juggling Group Interviews
- Handling Computer and Meal Interviews
- Acing Performance and Employment Tests
- Grace under Stress Interviews
- Answers to Stress Questions

### **Interview Skills: Following Through**

**4 hours**

**ITVC09**

*Interview Skills: Following Through shows users how to overcome objections during interviews, handle follow-up interviews, and step through the process from post-interview to the first days on the new job.*

- Overcoming Objections
- Answering Career Objections
- The Follow-Up Interview
- Thank-You Letters
- Following Up

# Investing Fundamentals Series

**Total Time: 24 hours**

## **Investing Fundamentals: The Basics**

**4 hours**

**IVFC01**

*Investing Fundamentals: The Basics explains to users how to get a general picture of their personal financial situations and begin the process of investing.*

- Making Realistic Plans
- Maximizing Small Savings
- Managing Risk
- Diversification
- Starting Out Slowly
- Checking Up on Yourself
- Tightening the Budget Belt

## **Investing Fundamentals: Organizing**

**4 hours**

**IVFC02**

*Investing Fundamentals: Organizing explains to users how to determine their financial situations and make plans for investment funds.*

- Looking at Net Worth
- Learning from Net Worth
- Keeping Cash
- Making Cash Reserves Work
- Setting Financial Goals
- Learning More

## **Investing Fundamentals: Stocks**

**4 hours**

**IVFC03**

*Investing Fundamentals: Stocks explains how to choose and invest in stocks.*

- Introducing Stocks
- Learning the Types of Stocks
- Getting Started
- Choosing Candidates
- Reading the Stock Pages
- Researching Online and Using Value Line
- Trading Stocks

## **Investing Fundamentals: Bonds**

**4 hours**

**IVFC04**

*Investing Fundamentals: Bonds explains how to choose and invest in bonds. Each type of bond (U.S. Treasuries, U.S. government agency bonds, municipal bonds, and corporate bonds) is explained and the unique advantages and disadvantages are described.*

- Introducing Bonds
- U.S. Bonds
- Municipal Bonds
- Corporate Bonds
- Researching and Buying Bonds

**Investing Fundamentals: Mutual Funds****4 hours****IVFC05**

*Investing Fundamentals: Mutual Funds explains to users how to choose and invest in mutual funds.*

- Introducing Mutual Funds
- Stock Funds
- Bond Funds
- Analysing Mutual Funds
- Fund Evaluations and Online Research
- Choosing a Mutual Fund
- Reviewing Fund Investing

**Investing Fundamentals: Planning****4 hours****IVFC06**

*Investing Fundamentals: Planning explains how to prepare for the future with solid investing strategies, retirement planning and insurance coverage.*

- Planning for Retirement
- Using IRAs
- Using 401(k) Plans
- Life Insurance
- Disability Insurance

## Money 98 Series

**Total Time: 8 hours**

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### ***Money 98: Getting Started***

**4 hours**

**MNYC01**

*Money 98: Getting Started provides an introduction to Microsoft Money 98 and how to use it for basic tracking of personal finances.*

- Getting Started with Microsoft Money 98
- Creating More Accounts
- Recording a Basic Transaction
- Recurring Payments and New Categories
- Entering a Pay check
- Working with Other Transactions
- Managing Loans

### ***Money 98: Plan and Budget for Life***

**4 hours**

**MNYC02**

*Money 98: Plan and Budget for Life provides an introduction to Microsoft Money 98 and how to use it to budget your finances, prepare taxes, and make long-term financial plans.*

- Reconciling Accounts with Statements
- Viewing Financial Reports
- Scheduling Bill Payments
- Creating a Budget
- Preparing for Your Taxes

# QuickBooks Series

**Total Time: 30 hours**

## **QuickBooks: The First Time in QuickBooks**

**3 hours**

**QBKC01**

*QuickBooks: The First Time in QuickBooks explains how to get started with QuickBooks and how to begin the EasyStep Interview process.*

- Using QuickBooks for the First Time
- Preparing Information for QuickBooks
- Beginning the Interview
- Entering Basic Company Information
- Entering Accounts and Inventory

## **QuickBooks: Setting Up Accounting**

**3 hours**

**QBKC02**

*QuickBooks: Setting Up Accounting shows users how to complete the EasyStep Interview to set up company records in QuickBooks.*

- Establishing Preferences
- Enabling QuickBooks Features
- Starting Accounts and Items
- Setting Up Inventory
- Entering Opening Balances
- Setting Up Payroll

## **QuickBooks: Entering Historical Data**

**3 hours**

**QBKC03**

*QuickBooks: Entering Historical Data shows users how to enter existing or past information about their companies to establish QuickBooks information.*

- Entering Bills and Invoices
- Entering Money Received
- Entering Bills and Deposits
- Entering Other Transactions
- Getting Help in QuickBooks

## **QuickBooks: Managing Accounts and Lists**

**3 hours**

**QBKC04**

*QuickBooks: Managing Accounts and Lists show users how to use QuickBooks to track accounts and manage items in their companies. This includes how to create and manage lists for viewing and how to generate reports and graphs for visually assessing a company's accounting status.*

- Understanding Accounts and Accounting
- Adding and Deleting Accounts
- Understanding Items
- Viewing, Finding, and Adding Items in Lists
- Managing Items
- Creating Item Reports and Graphs
- Customer, Vendor, and Employee Lists

**QuickBooks: Invoices and Sales Tax****3 hours****QBKC05**

*QuickBooks: Invoices and Sales Tax shows users how to manage invoices and record sales tax information in QuickBooks.*

- Creating an Invoice
- Tracking Invoices
- Recording Income
- Collecting Sales Tax
- Managing Sales Tax

**QuickBooks: Paying Bills****3 hours****QBKC06**

*QuickBooks: Paying Bills shows users how to pay bills through check writing and cash transactions in QuickBooks.*

- Receiving Goods and Paying Bills
- Writing and Printing Checks
- Tracking Checks
- Entering Cash Transactions

**QuickBooks: Managing Assets and Reports****3 hours****QBKC07**

*QuickBooks: Managing Assets and Reports shows users how to track inventory and other assets, and how to create QuickBooks reports on their business.*

- Using the Inventory Tracking System
- Managing Inventory
- Inventory Reports
- Managing Fixed Assets
- Standard Reports
- Customizing Reports

**QuickBooks: Paying Employees****3 hours****QBKC08**

*QuickBooks: Paying Employees shows users how to manage payroll, track employee information, and disburse payments to employees and contractors.*

- Managing Payroll in QuickBooks
- Setting Up Employees
- Updating Year-to-Date Amounts
- Payday
- Paying Independent Contractors

**QuickBooks: Managing Taxes****3 hours****QBKC09**

*QuickBooks: Managing Taxes shows users how to withhold and pay employee taxes, create tax reports, and account for income taxes in QuickBooks.*

- Working with W-2s and Tax Tables
- Setting up Employee Taxes
- Withholding Taxes
- Printing Tax Forms
- Tax Reports
- Accounting for Income Taxes

**QuickBooks: Online Banking and Budgets****3 hours****QBKC10**

*QuickBooks: Online Banking and Budgets shows users how to manage online banking, create and track budgets, and use existing information to create forecast reports in QuickBooks.*

- Investigating Online Banking
- Setting Up an Online Account
- Managing Online Transactions
- Budgeting
- Forecasting
- Creating Forecasts

## Quicken 98

**Total Time: 8 hours**

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### **Quicken 98: Getting Started**

**4 hours**

**QKNC01**

*Quicken 98: Getting Started provides an introduction to using Quicken to track your personal finances.*

- Introduction to Quicken
- Getting Started with Quicken
- Creating Accounts
- Recording a Basic Transaction
- Entering a Pay check
- Managing Loans
- Working with Transactions
- Reconciling Accounts

### **Quicken 98: Planning and Budgeting**

**4 hours**

**QKNC02**

*Quicken 98: Planning and Budgeting provides instruction on setting up and tracking a personal or household budget and using information from Quicken to help prepare income tax returns.*

- Viewing the Financial Calendar
- Scheduling Events on the Financial Calendar
- Budgeting
- Tracking the Budget
- Getting More Reports
- Preparing for Your Taxes



## Resumes Series

**Total Time: 16 hours**

### **Resumes: Choosing a Resume Format**

**4 hours**

**RSMC01**

*Resumes: Choosing a Resume Format introduces resume writing and the most common resume formats.*

- The Many Uses of Resumes
- Resume Commandments and Formats
- Chronological and Functional Formats
- Achievement and Hybrid Formats

### **Resumes: Starting Out with a Bang**

**4 hours**

**RSMC02**

*Resumes: Starting Out with a Bang shows how to build the heading, job objectives, summary of qualifications, and work history sections of a resume.*

- Designing the Heading
- Writing Meaningful Objectives
- Developing a Summary of Qualifications
- Making the Most of Work History

### **Resumes: Packing a Powerful Resume**

**4 hours**

**RSMC03**

*Resumes: Packing a Powerful Resume shows how to build the skill headings, achievements, education, and interests sections of a resume.*

- Choosing Marketable Skill Headings
- Writing an Impressive Achievements List
- Building an Education Section
- Including Other Relevant Information

### **Resumes: Circulating Your Resume**

**4 hours**

**RSMC04**

*Resumes: Circulating Your Resume shows how to use networking and other methods of distributing a resume, including how to use online resumes and prepare a resume for computer scanning.*

- Formatting and Distributing
- Creating and Using Networking Cards
- Preparing for Computer Scanning
- Distributing Your Resume Online

## Retirement Planning Series

**Total Time: 8 hours**

### ***Retirement Planning: Money Management***

**4 hours**

***RETC01***

*Retirement Planning: Money Management introduces basic financial planning and assessment strategies.*

- Creating a Plan
- Assessing Your Financial State
- Establishing Your Goals
- Managing Your Assets
- Building Up Your Savings
- Professional Financial Help
- Tax Strategies

### ***Retirement Planning: Investing***

**4 hours**

***RETC02***

*Retirement Planning: Investing explains the basic investment tools used to build up savings for retirement.*

- Pension Plans
- IRAs and Keoghs
- Employer Investment Programs
- Cash Investments
- Stock and Mutual Fund Investments
- Bond Investments
- Minimizing Investment Taxes
- Allocating Your Assets
- Investment Fundamental

# SAT Preparation Series

**Total Time: 16 hours**

## ***SAT Preparation: Test Strategies***

**4 hours**

***SATC01***

*SAT Preparation: Test Strategies explains the best approaches to the SAT test in general and to each type of question.*

- SAT Structure
- Test-Taking Strategies
- Strategies for Reading Questions
- Strategies for Analogy Questions
- Strategies for Sentence Questions
- Strategies for Problem Solving
- Strategies for Quantitative Comparisons
- Strategies for Grid-In Questions
- Preparing for Test Day

## ***SAT Preparation: Practice Test 1***

**6 hours**

***SATC02***

*SAT Preparation: Practice Test 1 allows users to try sample SAT test sections and provides explanations for both wrong and correct answers.*

- Section 1: Math
- Section 2: Verbal
- Section 3: Math
- Section 4: Verbal
- Section 5: Math and Verbal

## ***SAT Preparation: Practice Test 2***

**6 hours**

***SATC03***

*SAT Preparation: Practice Test 2 allows users to try sample SAT test sections and provides explanations for both wrong and correct answers.*

- Section 1: Math
- Section 2: Verbal
- Section 3: Math
- Section 4: Verbal
- Section 5: Math and Verbal

# Works Series

**Total Time: 21 hours**

## **Works: Getting Started**

**3 hours**

**WKSC01**

*Works: Getting Started shows users how to get around in Works applications and manage Works documents.*

- Starting Tasks
- Getting Help
- Managing Files
- Printing
- Managing Windows

## **Works: Introducing the Word Processor**

**3 hours**

**WKSC02**

*Works: Introducing the Word Processor shows how to use the Microsoft Works Word Processor for basic composition tasks.*

- Navigating the Word Processor
- Editing Text
- Creating Tables
- Using Word Processor Tools

## **Works: Formatting Word Processor Pages**

**3 hours**

**WKSC03**

*Works: Formatting Word Processor Pages explains how to format text and documents in the Works Word Processor.*

- Formatting Text
- Formatting Paragraphs
- Setting Tabs and Bullets
- Formatting Pages
- Creating Headers and Footers

## **Works: Using the Spreadsheet**

**3 hours**

**WKSC04**

*Works: Using the Spreadsheet provides an introduction to creating and entering data in the Works spreadsheet.*

- Navigating the Spreadsheet
- Entering Data
- Selecting and Modifying Data
- Using Formulas
- Working with Functions

## **Works: Managing Spreadsheet Data**

**3 hours**

**WKSC05**

*Works: Managing Spreadsheet Data explains how to use the Works spreadsheet for data processing tasks.*

- Manoeuvring Data
- Formatting Data and Cells
- Formatting the Spreadsheet
- Creating Charts

**Works: Using the Database****3 hours****WKSC06**

*Works: Using the Database provides an introduction to the Works Database, and how to use it for basic organization and presentation tasks.*

- Creating Databases
- Modifying Database Fields
- Entering and Editing Data
- Modifying the Form
- Finding, Viewing, and Sorting Records
- Creating Reports

**Works: Calendar and Cross-Works Tools****3 hours****WKSC07**

*Works: Calendar and Cross-Works Tools introduces users to the Works Calendar and to the functions that can be used across multiple applications in Works.*

- Integrating the Applications
- Address Book and Mail Merges
- Using the Works Calendar
- Setting Appointments
- Modifying Appointments
- Creating Events and Reminders
- Searching and Sharing the Calendar

## Order Form

Please enter your details below and return them to us via mail.

### Contact Details:

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Email:	_____

### Order Details:

Course Description	Price (£) (inc Vat)	Quantity	Sub Total
End User Desktop Computing	116.32		
End User Home and Small Business	116.32		
End User Business Skills Development	116.32		
Technical General	141.00		
Technical MCSE	141.00		
Technical Web Development	141.00		

**Total:** \_\_\_\_\_

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