

Accounting Software Skills Passport

Track practical skills across Excel, Xero, QuickBooks, Sage, FreeAgent, payroll and month-end work.

This resource helps you organise skills evidence. It is not a software certification and does not imply endorsement by any software provider.

Skills passport

Use this to turn learning into employability evidence. Add certificates only where the provider actually awards one.

Area	Skills to evidence	Evidence or project example	Confidence 1-5	Next action
Excel	Formulas, lookups, pivots, reconciliations, checks	Reconciliation file or reporting template		
Xero	Bank feeds, sales, purchases, VAT, reports	Demo file, advisor training, practice notes		
QuickBooks	Banking, invoices, expenses, VAT, reports	ProAdvisor learning or practice company file		
Sage	Customers, suppliers, bank rec, VAT, reporting	Sage learning evidence or sample workflow		
FreeAgent	Banking, invoicing, expenses, VAT basics	Small business workflow notes		
Payroll	Payslips, PAYE, pensions, records	Payroll checklist or training evidence		
Month-end	Accruals, prepayments, reconciliations, review notes	Month-end checklist or close pack		
Compliance	Deadlines, records, VAT, tax awareness	Official guidance notes or Fileminder checklist		