MASTERCLASS 2

FREE DIGITAL TOOLS

FOR SMALL BUSINESSES & NGOS

Bookkeeping · Quotes · Invoices · Receipts

Simplify financial administration with free digital tools

PRESENTER & TRAINER

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ORGANIZED & PRESENTED BY

Excellence Foundation for South Sudan — Towards a New Dawn

YOUTH SKILLS BOOST — Reskilling and Upskilling Youth for Success

Introduction: About Me



5+

Years of Experience

Upskilling & Reskilling Students and Professionals

Teacher & Digital Skills Trainer

Dedicated to upskilling, reskilling, and sharing opportunities with students and professionals so that they can grow and thrive.

Core Focus: Empowering youth and organizations with practical digital tools

Mission: Bridging skill gaps for sustainable career growth

Impact: Enabling professionals to adapt, innovate, and thrive

Introduction

OPENING QUESTION

What financial process takes the most time in your organization?



Bookkeeping & Cash Flow

Tracking daily income, sales, cash flow, and routine operational expenses



Quotations & Estimates

Preparing cost estimates, pricing proposals, and client quotes



Invoicing & Billing

Creating, issuing, and following up on client invoices



Receipts & Filing

Issuing payment receipts and organizing physical/digital records

https://www.menti.com/al9uztarcxa3

What We Will Cover

01

Basic Digital Bookkeeping

Track daily cash flows, revenues, and expenses digitally

02

Generating Quotations

Create clear, professional cost estimates for clients

03

Creating Invoices

Build itemized billing statements for products & services

04

Issuing Receipts

Provide official proof of payment for completed transactions

05

Organizing & Storing Records

Maintain secure digital filing structures for simple retrieval

Learning Outcomes

By the end of the masterclass, participants will be able to:

01



Digital Bookkeeping

Track income and expenses digitally

02



Quotations

Generate professional quotations

03



Invoicing

Create and manage invoices

04



Receipts & Records

Issue receipts and maintain transaction records

Why Go Digital?

01

Save Time

Save time and reduce repetitive paperwork

02

Stay Organized

Keep financial records organized

03

Reduce Errors

Reduce errors in quotes, invoices and receipts

04

Look Professional

Create professional-looking documents

05

Easy Sharing

Make information easier to find and share

The Basic Financial Workflow

A simple transaction journey

01 

Customer Request

02 

Quotation

03 

Customer Approval

04 

Invoice

05 

Payment

06 

Receipt

07 

Bookkeeping Record

Key message:
A good digital system connects these steps and keeps the records organized.

Free Digital Tools

Masterclass Focus

Zoho Books
Primary Hands-On Tool

Bright Book
Core Supported Alternative

Explore After the Masterclass

- Manager.io
- Odoo
- Invoice Home
- Invoice Ninja

Remember:
Choose the tool that fits your workflow—not the tool with the most features.

Choosing the Right Tool

Key questions to ask before selecting a financial tool:

- What do we need to manage?
- How many transactions do we have?
- Full bookkeeping or mainly invoicing?
- How many people need access?
- Do we need financial reports?
- Supports currency & tax requirements?
- Can we export & back up our data?
- What happens when free limits are reached?

ZOHO BOOKS

What is Zoho Books?

Cloud-based accounting software for managing business finances.

Useful Features Include:

- Bookkeeping
- Quotes
- Invoices
- Expenses
- Bills
- Payments
- Bank Reconciliation
- Financial Reports

Free Plan Option:

Zoho Books currently offers a Free plan in some markets, with features including invoices, quotes, expenses, journals, bank reconciliation, and financial reports.

Zoho Books: Setting Up

Step 01
Create an Account

Step 02
Set Up Your Organization

Step 03
Add Business/NGO Info

Step 04
Set Currency

Step 05
Add Customers & Vendors

Step 06
Set Up Products / Services

Step 07
Configure Financial Accounts

Digital Bookkeeping

01

Track Income & Expenses

Track income and expenses consistently to ensure complete financial control.

02

Record Complete Details

Record date, description, amount and payment method for every entry.

03

Separate Finances

Separate business/organizational transactions from personal spending.

04

Keep Supporting Documents

Keep supporting documents and receipts safely stored for verification.

05

Review Records Regularly

Review records regularly to detect errors early and preserve data integrity.

Generating Professional Quotes

01

Organization Details

Include organization/business name and contact details

02

Client & Quote ID

Add customer/client details and quote number

03

Items & Pricing

List items or services, quantities and prices

04

Validity & Terms

State validity period and payment terms

05

Export & Share

Save and share as PDF

Creating Invoices

01

Number & Date

Use a unique invoice number and date

02

Reference Quote

Reference the approved quote where applicable

03

Items & Pricing

Clearly show items/services, prices and total

04

Payment Details

Include payment instructions and due date

05

Record Keeping

Keep a copy for your records

Issuing Receipts

01

Payment Confirmation

Confirm payment received

02

Number & Date

Include receipt number and date

03

Reference Details

Reference the invoice or transaction

04

Amount & Method

Show amount received and payment method

05

Systematic Storage

Store receipts systematically

Introducing Brightbook

Simple online bookkeeping designed for small businesses, freelancers, and contractors.

01

Bookkeeping

02

Quotes & Invoices

03

Bills & Expenses

04

Banking & Reconciliation

05

Cash-Flow Visibility

06

Multi-Currency Support

07

Multiple Users & Companies

Why explore Brightbook?

01

Simple

Easy-to-use bookkeeping interface requiring no technical accounting expertise.

02

Online

Cloud-based software accessible anytime, anywhere from any modern browser.

03

Accessible

Free digital tool designed specifically for small businesses and non-profits.

Brightbook: Practical Workflow

Brightbook allows users to create and email branded quotes and invoices and track money owed, money owing and cash flow.

STEP 01

Set up organization

STEP 02

Add customer

STEP 03

Create quote

STEP 04

Create invoice

STEP 05

Record payment

STEP 06

Review bookkeeping

Zoho Books vs Brightbook

Zoho Books

Best For

Broader accounting workflow

- Bookkeeping
- Quotes
- Invoices
- Expenses
- Banking
- Reports
- Online / Cloud

Brightbook

Best For

Simple bookkeeping & invoicing

- Bookkeeping
- Quotes
- Invoices
- Expenses
- Banking
- Reports
- Online / Cloud

Good Practices

PRACTICE 01

Keep records accurate and up to date

PRACTICE 02

Use standard templates

PRACTICE 03

Reconcile records with cash/bank transactions

PRACTICE 04

Back up important files

PRACTICE 05

Protect passwords and confidential information

Key Takeaways

TAKEAWAY 01

Free digital tools can reduce administrative workload

TAKEAWAY 02

Consistent records improve financial visibility

TAKEAWAY 03

Professional documents build trust

TAKEAWAY 04

Start simple—and improve your system over time

Recap

KEY QUESTION

What is your key takeaway from this session?

OPEN FLOOR

Questions & Discussion

Conclusion

Thank you!

WE APPRECIATE YOUR TIME

Speaker Profile

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