STEM AND TECHNOLOGICAL INNOVATION

Data Science

DIGITAL TOOLS FOR ACCOUNTING PROFESSIONALS

ENTIDADE
FORMADORA
CERTIFICADA

Your Mobility Partner

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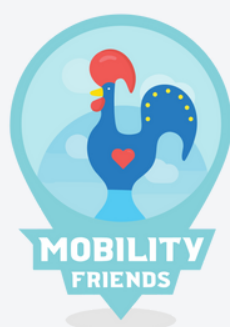
COURSE OVERVIEW

This course offers a practical introduction to essential digital tools for accounting professionals, with a special focus on Sage software. Participants will learn how to use technology to streamline accounting processes, manage financial data accurately, and generate reports efficiently. The course covers key features of Sage alongside complementary digital tools that support bookkeeping, invoicing, payroll, and tax management. By the end of the course, participants will be equipped to leverage digital solutions to enhance their accounting practices in modern business environments.

TARGET AUDIENCE

This course is designed for accounting professionals, finance staff, and students seeking to enhance their skills with modern digital tools, including Sage software. It is suitable for beginners and intermediate users aiming to improve efficiency, accuracy, and productivity in accounting tasks through technology.

REQUIREMENTS

To take part in the course, participants must meet the following requirements:
- Have at least a B1 level of English (independent user);
- Complete and submit the registration form before the start of the training;
- Bring a laptop or tablet to use during the sessions;
- Commit to active participation and attend at least 80% of the course.

COURSE OBJECTIVES

The objectives of the course are:
- Understand the role of digital tools in modern accounting practices.
- Navigate and utilize Sage software for core accounting functions.
- Manage financial transactions, invoicing, and payroll using digital platforms.
- Generate accurate financial reports and statements efficiently.
- Apply automation to streamline routine accounting tasks.
- Ensure compliance with relevant accounting standards and regulations.
- Improve accuracy and productivity through effective use of accounting technology.

CONTACTS AND REGISTRATION

For registrations, additional information, or budget requests, please contact our team by email at trainingcourses@mobilityfriends.org or visit our website at www.mobilityfriends.org .

LEARNING OUTCOMES

Upon successful completion of this course, learners will be able to:

1. Navigate and operate Sage software efficiently.
2. Register and manage clients, suppliers, stock, and payroll within Sage.
3. Record and process key commercial operations such as supply, payments, deliveries, and debt management.
4. Perform month-end closing including income and expense entries and preparation of accounting notes.
5. Utilize complementary free tools for bookkeeping, invoicing, and document management.
6. Generate and interpret financial reports using Sage and other digital tools.
7. Apply best practices in digital accounting workflows and compliance.

METHODOLOGY

The course is structured around a rigorous methodology that combines theoretical exposition, practical work, and applied demonstrations. This approach ensures a thorough understanding of the subject matter and its direct application in real-world contexts.

Theoretical sessions provide essential foundations, while practical work and demonstrations facilitate the development of technical skills and familiarity with the specific tools and procedures relevant to the course.

Continuous monitoring through individualized feedback allows for tracking learners' progress and ensures the achievement of the set objectives, preparing participants to face professional challenges with competence and precision.

ASSESSMENT

Assessment is carried out continuously throughout the course, using a holistic and learner-centered approach that reflects both participation and performance. Each participant is evaluated based on their overall engagement, regular attendance, punctuality, interest in the topics covered, ability to apply knowledge during practical tasks, and interaction with peers in individual and group activities.

The evaluation process includes a variety of classroom-based tasks (oral and written), short daily assignments, role-plays, and simulations. Trainers provide ongoing, individualized feedback to support progress and encourage active learning.

A Certificate of Participation is awarded to participants who attend at least 80% of the sessions and demonstrate consistent involvement and commitment during the training.

DURATION

The standard duration of our course is 20 hours (5 days), designed to ensure comprehensive and effective learning. However, this duration can be adjusted, in specific cases, to meet the particular needs of each group, in order to optimize outcomes and better suit the training context.

For further details or to discuss a customized schedule, please get in touch with us.

PRICE AND FUNDING

Each quotation is personalized and depends on several factors, such as the number of participants, the number of training hours, the location of the course, and any additional services requested (accommodation, transport, meals, cultural activities, etc.).

To receive a tailored quotation for your group, please get in touch with us.

The training can be funded through programs such as Erasmus+ (KA1 – Learning Mobility), among other European support mechanisms. For more information about funding, participants should contact their sending organization or their country's National Agency directly.

LOCATION AND COURSE LANGUAGE

We have training rooms in several cities in Mainland Portugal, such as Barcelos (headquarters), Braga, Póvoa de Varzim, and Porto. We also have spaces in the islands of Madeira (Funchal) and the Azores (Ponta Delgada). Additionally, we have facilities in Valencia, Spain.

The course is delivered in English.

CERTIFICATION

A Certificate of Participation is awarded to participants who attend at least 80% of the sessions and demonstrate consistent engagement and commitment throughout the training. Upon completion of the course, a formal certification ceremony will take place, during which the certificates will be presented to the participants.

OTHER SERVICES

To enrich the training experience, Mobility Friends offers a range of additional services, subject to availability and additional cost, which can be arranged for individual participants or groups.

Services include:

- Accommodation in partner residences or hotels
- Meals (lunch and/or dinner)
- Transfers between the accommodation and the training room
- Airport transfers
- Cultural visits

All services are subject to availability and must be requested in advance. For more information and personalised quotes, please contact our team.

COURSE CONTENTS

MODULE 1: INTRODUCTION TO DIGITAL TOOLS IN ACCOUNTING

- Overview of digital transformation in accounting.
- Benefits of adopting technology in accounting workflows.
- Introduction to key digital tools used by accounting professionals.

MODULE 2: IN-DEPTH SAGE ACCOUNTING SOFTWARE TRAINING

- Setting up a commercial company in Sage.
- Management of stocks, clients, and suppliers.
- Payroll processing and salary calculations.
- Handling supply, payment, delivery, and debt collection operations.
- Month-end closing processes: recording income, expenses, and accounting notes.
- Understanding and using the general chart of accounts.
- Generating financial statements and reports in Sage.

MODULE 3: FREE CLOUD ACCOUNTING SOLUTIONS

- Overview of user-friendly free tools like Wave and ZipBooks.
- Managing invoices, expenses, and cash flow.
- Basic report generation and financial monitoring.

MODULE 4: SPREADSHEET TOOLS FOR ACCOUNTING EFFICIENCY

- Advanced Excel and Google Sheets skills for data management.
- Essential formulas, pivot tables, and templates for bookkeeping.
- Data validation and error checking techniques.

MODULE 5: DOCUMENT AND WORKFLOW MANAGEMENT

- Secure document storage and sharing with Google Drive and OneDrive.
- Collaborating on financial documents in real-time.
- Introduction to digital signatures and compliance considerations.

*Please note that program content may be subject to change based on input from our trainers.

COURSE CONTENTS

MODULE 6: EXPENSE AND BUDGET MANAGEMENT TOOLS

- Utilizing free apps such as Mint and Expensify.
- Tracking business expenses and budgeting basics.
- Integrating expense data with accounting software.

MODULE 7: FINANCIAL REPORTING AND DATA VISUALIZATION

- Basics of Power BI and Google Data Studio for accountants.
- Creating dashboards and visual reports for financial insights.
- Automating reports and sharing with stakeholders.

MODULE 8: CAPSTONE PROJECT - INTEGRATED ACCOUNTING MANAGEMENT

- Selection of a realistic or simulated commercial company scenario.
- Complete company setup in Sage: registering clients, suppliers, inventory, and employees.
- Recording key operations: purchases, sales, payments, receipts, and payroll processing.
- Performing month-end closing: revenue and expense entries and preparing financial statements.
- Using complementary free tools for expense tracking, reporting, and secure document storage.
- Preparing and presenting a final report integrating data and analyses from all utilized tools.
- Reflecting on the project experience and practical lessons learned.

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for Employment and Labor Relations

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