PRINTLY • DIGITAL PRINTABLE COLLECTION

Small Business Starter Kit

Printable trackers for customers, orders, income, expenses and weekly business planning.

Good ideas. Clear plans. Better organised.

YOUR NAME: _____

A practical, easy-to-use printable. Print on A4 paper at 100% / Actual Size.

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START HERE

Use this kit with confidence

Write one entry per customer, order or transaction. Keep this workbook secure. Do not record passwords, card details or sensitive identity data.

Business name: _____ Month: _____ Year: _____

Know your numbers

KEY MEASURE	TARGET	ACTUAL
Enquiries received		
New customers		
Orders completed		
Revenue		
Business expenses		
Profit before tax		
Repeat customers		

THIS MONTH'S MAIN BUSINESS GOAL

Keep customer details organised

Record only the information you need to serve the customer.

DATE	CUSTOMER	CONTACT	REQUIREMENT	FOLLOW-UP

From enquiry to delivery

Suggested status: New, In progress, Ready, Delivered or Cancelled.

ORDER ID	DATE	ITEM / SERVICE	AMOUNT	STATUS	DUE

Money received

DATE	INVOICE / ORDER	CUSTOMER	AMOUNT	METHOD	RECEIVED
					■
					■
					■
					■
					■
					■
					■
					■
					■
					■

TOTAL RECEIVED: _____

Know what the business spends

Keep receipts and source documents separately.

DATE	CATEGORY	DESCRIPTION	AMOUNT	RECEIPT
				■
				■
				■
				■
				■
				■
				■
				■
				■
				■
				■

TOTAL EXPENSES: _____

Details to prepare an invoice

This worksheet is not a tax-compliant invoice.

BUSINESS NAME / ADDRESS / CONTACT

CUSTOMER NAME / BILLING DETAILS

DESCRIPTION	QTY	RATE	LINE TOTAL

SUBTOTAL	TAX (IF APPLICABLE)	DISCOUNT	TOTAL DUE

PAYMENT TERMS / NOTES

Show up consistently

DATE	CHANNEL	CONTENT / OFFER	CALL TO ACTION	DONE
				■
				■
				■
				■
				■
				■
				■
				■

IDEAS TO TEST

Move the business forward

WORK AREA	ONE IMPORTANT ACTION	WHEN	DONE
Sales			■
Customer service			■
Marketing			■
Operations			■
Finance			■
Learning			■

BIGGEST BOTTLENECK THIS WEEK

Avoid last-minute surprises

ITEM	OPENING QTY	ADDED	USED / SOLD	BALANCE	REORDER AT

SUPPLIERS TO CONTACT

Review, learn, improve

QUESTION	NOTES
What brought in the most enquiries?	
Which product / service performed best?	
What took more time than expected?	
What should I stop, start or continue?	
What is the most important next step?	

NEXT MONTH'S TOP THREE GOALS