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Show us how you like to
organise your expenses, so
we can do it for you

- 1

Super simple setup

Bring in you transactions, review a few expenses to help us learn.
- 2

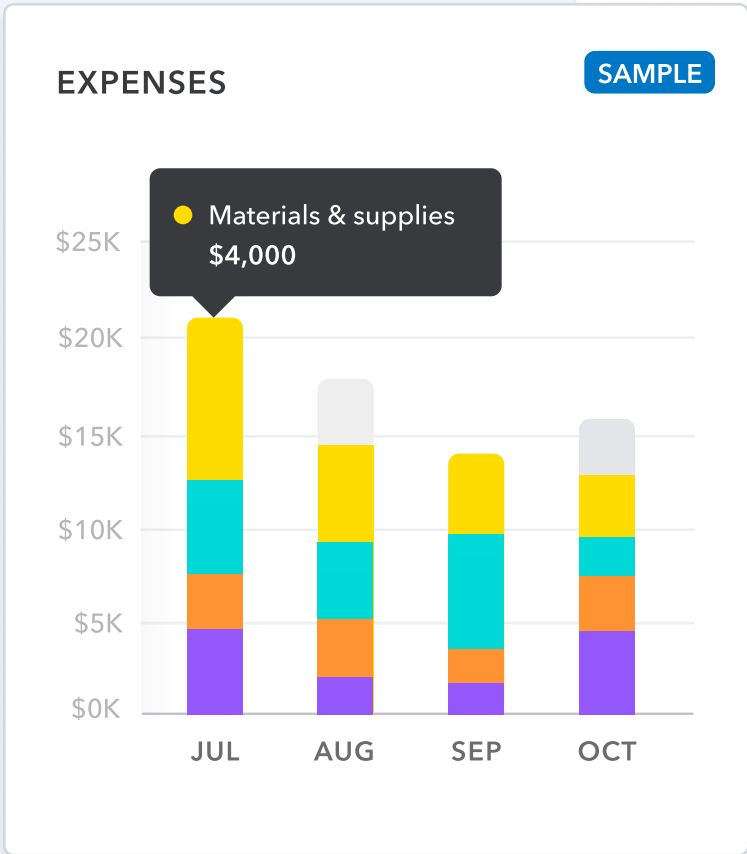
Smart tech that learns from you

Train QuickBooks to spot similar expenses and automatically sort them into tax categories.
- 3

Stay on top of BAS

With your expenses organised correctly, you're always ready for tax time.

Get started



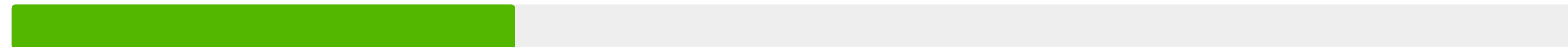
Bringing in your transactions



Chase Checking *9500

\$5,000.20

Downloading 1,934 transactions



Everything's in! Next, let's fine tune



Categorise a few expenses so we can do more for you next time

- Most of your expenses were categorised for you.
- 6 expenses need your input.

Categorise expenses

Back

Skip for now

What was this expense for?

You can always change the category later.



Starbucks

Starbucks#234123

-\$60.20

09/01/2020



Meals and entertainment



Entertainment with clients



Advertising and marketing



It's something else

[< Previous expense](#)

1 of 6

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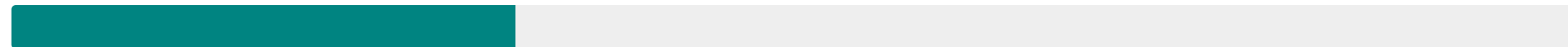
Finding similar expenses



Office Supplies

\$1,000.20

45 expenses fit this category



Here’s how your expenses are shaping up.

We’ll review them next.

EXPENSES

DRAFT

\$1,000.20

Expenses for last 12 months

● Materials & supplies

\$4,000

Month	Payroll Clearing	Taxes & Licenses	Insurance	Utilities	Unassigned expenses
JAN	\$5,000	\$4,000	\$6,000	\$2,000	\$1,000
FEB	\$2,000	\$4,000	\$5,000	\$2,000	\$1,000
MAR	\$2,000	\$2,000	\$7,000	\$2,000	\$3,000
APR	\$7,000	\$4,000	\$5,000	\$2,000	\$2,000
MAY	\$2,000	\$2,000	\$3,000	\$2,000	\$1,000
JUN	\$3,000	\$7,000	\$7,000	\$2,000	\$1,000
JUL	\$2,000	\$4,000	\$4,000	\$2,000	\$2,000
AUG	\$5,000	\$4,000	\$6,000	\$2,000	\$1,000
SEP	\$2,000	\$2,000	\$3,000	\$2,000	\$4,000
OCT	\$0	\$0	\$0	\$0	\$0
NOV	\$0	\$0	\$0	\$0	\$0
DEC	\$0	\$0	\$0	\$0	\$0

We’ll refine these categories together to get a more accurate picture.

● Payroll Clearing

-\$19,332.90

● Taxes & Licenses

-\$11,112.40

● Insurance

-\$6,000.50

● Utilities

-\$4,312.00

● Unassigned expenses

-\$2,332.10

Why is this a draft?

Showing expenses from the accounts you just linked.

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Why is this a draft?

×

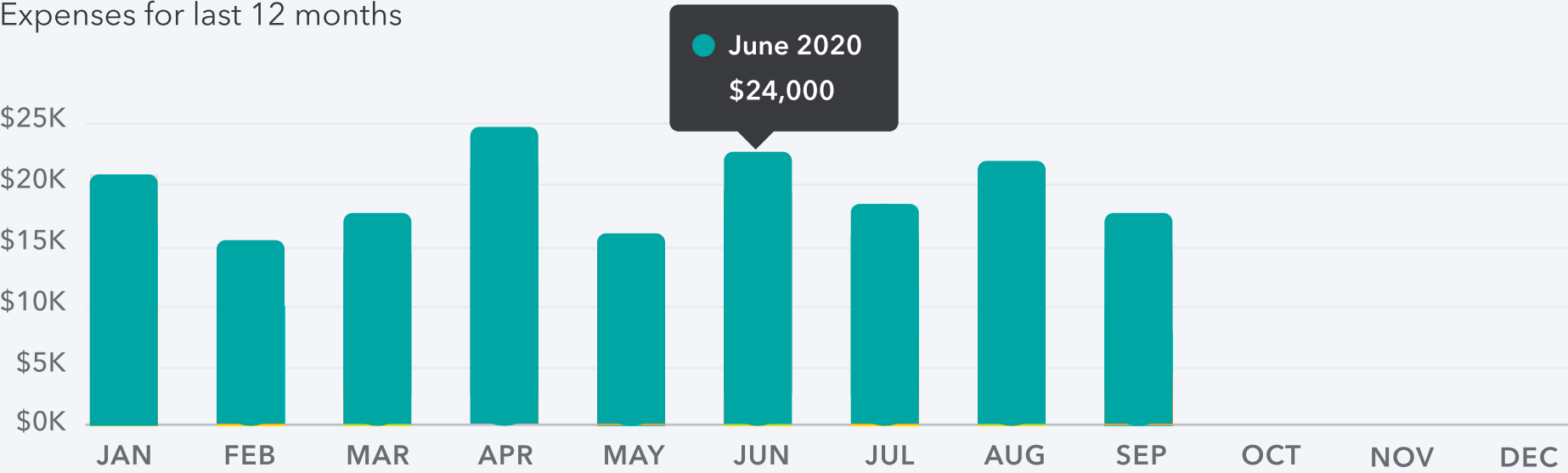
We suggested categories based on your feedback and what other businesses used. You'll see a more accurate report as you review more expenses.

Let’s review your expenses for Meals and entertainment

MEALS AND ENTERTAINMENT

\$1,000.20

Expenses for last 12 months



Are these expenses always Meals and entertainment?

- A

Amrin Thai

-\$1,000.00 (12 expenses)

✓ Yes

It’s something else
- D

Denika’s

-\$1,000.00 (12 expenses)

✓ Yes

It’s something else
- W

World Food Market

-\$1,000.00 (12 expenses)

✓ Yes

It’s something else

How this helps you stay organised

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Skip this for now

How this helps you stay organised

We’ll create a rule to apply these details to similar transactions in the future. You can always change the category or vendor.

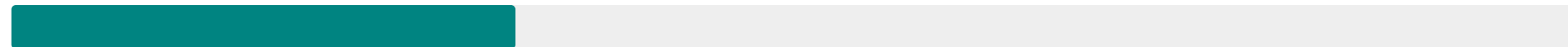
Updating categories



Expenses

\$1,000.20

Updating Payroll Clearing transactions





Nice work! You just categorised 1,034 expenses

That's hours of number crunching you'll never have to do. So now, you're free to do something you love.

Done