THE FREE BUSINESS OWNER GUIDE

5 Tips for Better Bookkeeping

Simple habits to save time, stay organized, and feel more confident about your business finances.

Practical steps you can start using this week.

EDGY TECHIE BOOKKEEPING

Personalized bookkeeping support for your business

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START WITH SMALL HABITS THAT MAKE A BIG DIFFERENCE

Better bookkeeping does not have to begin with a complete overhaul. Start with these simple habits and build consistency over time.

1

Separate Business and Personal Finances

Use a dedicated business bank account and credit card for business activity. Mixing personal and business transactions makes records harder to maintain and review.

TRY THIS: Review your last bank statement and identify any personal purchases that need to be recorded correctly.

2

Schedule a Weekly Money Check-In

Set aside 15 minutes each week to review recent transactions, outstanding invoices, upcoming bills, and anything that looks unfamiliar.

TRY THIS: Add a recurring 15-minute appointment to your calendar and make a short list of items to follow up on.

3

Give Every Receipt a Home

Save receipts and supporting documents as you go. A consistent digital filing system makes it easier to locate records when you need them.

TRY THIS: Create folders by month or use your accounting software to attach receipts to transactions.

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MAKE YOUR NUMBERS MORE RELIABLE AND USEFUL

4

Reconcile Accounts Every Month

Compare your accounting records with your bank and credit card statements. Reconciliation helps you identify missing entries, duplicates, and transactions that need correction.

TRY THIS: Choose a date each month to reconcile every active bank and credit card account.

5

Review Your Numbers Before Making Decisions

Your Profit & Loss report helps you see income and expenses over a period of time. Pair it with a look at cash balances and unpaid bills to understand the bigger picture.

TRY THIS: Review last month’s Profit & Loss report. Identify one expense trend and one question to investigate.

A SMALL STEP IS STILL PROGRESS

You do not need perfect books overnight. Consistent habits make your records easier to understand and help you spot issues sooner.

Keep this guide nearby and work on one tip at a time.

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YOUR QUICK BOOKKEEPING SELF-CHECK

Check each habit you already have in place. Circle one area to improve this month.

- [ ] I use separate accounts for business transactions.
- [ ] I review business transactions every week.
- [ ] I save receipts and supporting documents consistently.
- [ ] I reconcile bank and credit card accounts monthly.
- [ ] I review financial reports before making important decisions.

My next bookkeeping action:

YOU DESERVE MORE TIME FOR YOUR BUSINESS

You started your business to do something you love, not to spend your evenings sorting through transactions. Better bookkeeping can give you more time, clearer records, and greater confidence.

LET'S TALK ABOUT YOUR BOOKS

Schedule a complimentary consultation through the booking link on our website.

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