

REPORTS

Reports and the tax pack

Read the monthly profit and loss, open the year-end tax pack, and export the PDF, CSV, and full-year archive your preparer can work from.

<https://bizflowconnection.net/guides/reports-and-the-tax-pack>

1. Read the month

On the web, open Reports for the month's profit and loss beside the month before — income, expenses, and profit, each with its change. On the phone, "Monthly report" under the More tab shows the same story.

The screenshot shows the Biz Flow Connect web application interface. The top navigation bar includes the Biz Flow Connect logo, "My learning", "Expense & Mileage", "Leaderboard", "Settings", and a "Demo" button. The left sidebar lists various features under "My business" (1 of 2 businesses), including Overview, TRACK (Money, Trips, Receipts, Calendar), ORGANIZE (Clients & jobs, Vehicles, Places & rules, Budgets, Import), and UNDERSTAND (Reports, Tax pack, Tax years, How it works). The main content area is titled "Profit & loss" for August 2026. It shows three summary boxes: Income (\$1,800.00), Expenses (\$97.50), and Profit (\$1,702.50). Below these is a section titled "WHERE IT WENT" with a table showing expenses categorized by what was actually spent and what counts toward deductions. The table has three columns: CATEGORY, SPENT, and COUNTS TOWARD DEDUCTIONS. The rows are: Meals (\$64.50 spent, \$32.25 counts), Office expenses (\$21.00 spent, \$21.00 counts), Parking & tolls (\$12.00 spent, \$12.00 counts), and a Total row (\$97.50 spent, \$65.25 counts). Below this is a section titled "WHERE IT CAME FROM" showing a single entry for Services (\$1,800.00). At the bottom, there is a section titled "BY JOB, ALL TIME" with a brief explanation of how the data is calculated.

CATEGORY	SPENT	COUNTS TOWARD DEDUCTIONS
Meals	\$64.50	\$32.25
Office expenses	\$21.00	\$21.00
Parking & tolls	\$12.00	\$12.00
Total	\$97.50	\$65.25

2. See where the money went

The expenses table shows two columns on purpose: what actually left, and what the tax treatment counts — meals, for example, count at half. Reports never blend the two.

3. Open the tax pack

Click "Tax pack" in the Reports header or the sidebar. It gathers the year in one place: the mileage log valued at the IRS rate for each trip's own date, the per-vehicle summary, and parking and tolls on top.

WARNING

Trips missing a detail stay out of the pack and the page says how many. Complete them on the Trips page and they join the log — an incomplete trip never counts wrong, it just waits.

Biz Flow Connect My learning **Expense & Mileage** Leaderboard Settings Demo

My business
1 of 2 businesses

Tax pack, 2026 2025 [Report \(PDF\)](#) [Mileage log \(CSV\)](#)

Everything a preparer asks for in one place: the mileage log, what it is worth at the IRS rate in force on each trip's own date, and the per-vehicle summary the forms want. Only complete records count.

WHAT THE YEAR IS WORTH

RATE PERIOD	KIND	TRIPS	MILES	RATE	ESTIMATED VALUE
2026-01-01 → 2026-06-30	Business	1	100.0	72.5¢/mi	\$72.50
2026-07-01 → now	Business	2	62.4	76¢/mi	\$47.42
Estimated mileage deduction					\$119.92
Parking & tolls — deductible on top of the standard rate					\$12.00

Estimated deduction based on the IRS standard mileage rate. This app does not provide tax, legal, or accounting advice — consult a tax professional.

PER VEHICLE
Total miles come from odometer readings; business miles from your log. The forms ask for both, and the percentage between them.

Ford Transit 400.0 mi total · 162.4 mi business · 41% business use

THE LOG ITSELF
3 complete trips — the CSV above carries exactly these rows.

DATE	WHERE	PURPOSE	MILES
2026-03-10	Shop → Client site, Austin	Kitchen install	100.0
2026-08-14	Shop → Supplier, Dallas	Material pickup	50.0

4. Export the documents

From the tax pack, download "Report (PDF)" and "Mileage log (CSV)". On the phone, the More tab's Export section offers the same per year, plus the ledger CSV.

5. Take the whole year with you

The "Year archive" builds one zip: every receipt image, a manifest saying which expense each one backs, and the mileage log. Hand it to your preparer or keep it — records are expected to be kept for years after filing.

6. Optional: the monthly email

At the bottom of Reports, turn on "Monthly report by email" to get each closed month's mileage summary with a link to the PDF. It is off unless you turn it on.