

RECEIPTS

Set up expense rules and categories

Teach BizFlow your vendors once — a rule files anything matching a pattern into the right category as you type, and you stay in charge.

<https://bizflowconnection.net/guides/set-up-expense-rules>

1. What a rule does

A filing rule says "any vendor containing this text files as that category". When you record money and the vendor matches, the category fills in with a note naming the rule. It is a suggestion — pick a different category and your pick wins.

2. Make one while recording money

The easiest rule is the one made in passing: on the money form, tick "Always file “...” as ..." under the vendor and category you just chose. Next time that vendor files itself.

The screenshot shows the Biz Flow Connect interface. At the top, there's a navigation bar with 'Biz Flow Connect', 'My learning', 'Expense & Mileage', 'Leaderboard', 'Settings', and a 'Demo' button. The main content area is titled 'Money' and includes a sub-header 'My business' (1 of 2 businesses). A sidebar on the left lists various tracking and organizing options like 'Overview', 'Money', 'Trips', 'Receipts', 'Calendar', 'Clients & jobs', 'Vehicles', 'Places & rules', 'Budgets', 'Import', 'Reports', 'Tax pack', 'Tax years', and 'How it works'. The main form area has tabs for 'Expense' and 'Income'. The 'Expense' tab is active, showing fields for 'Date' (10/09/2026), 'Amount' (48.20), and 'Category' (Supplies). Below these are fields for 'Job' (No job), 'Paid to' (Riverside Fuel), 'Paid with' (Business card, cash...), and 'What for' (Fill-up between jobs). There's a checkbox option 'Always file "Riverside Fuel" as Supplies' and a 'Record expense' button. At the bottom, there's a 'LATEST ACTIVITY' section with a search bar and a table showing financial data.

In	Out	Net
\$4,300.00	\$181.62	\$4,118.38

3. Manage rules on the phone

Open "Filing rules" from the More tab. Add one with a pattern of at least two characters and a "Files as" category, then "Save rule". Patterns match anywhere in the vendor name, capitals ignored, and the longest matching pattern wins.

1:56

← Filing rules

shell
Files as Travel Remove

Add a rule

Pattern

e.g. Shell

Matches anywhere in the party, case-blind. The longest matching pattern wins.

Files as

Travel

Save rule

4. Manage rules on the web

The same list lives on the Money page: "When the vendor contains" and "File it as", then "Save rule". Rules made on either surface apply on both.

5. Remove without rewriting history

Removing a rule stops future filing only — records already categorized keep their categories.

TIP

Rules pair well with receipts: a scanned receipt suggests the vendor, the rule suggests the category, and you confirm one prefilled form.