

GETTING STARTED

Use the phone and the web together

One account, one set of records: what syncs between the BizFlow app and the website, what each surface is best at, and how offline works.

<https://bizflowconnection.net/guides/use-phone-and-web-together>

1. One ledger, two doors

Your trips, money, receipts, vehicles, places, and rules are the same records everywhere. Record on the phone, review on the web, or the other way around — there is no separate copy to reconcile.

2. The phone works offline

Everything you record on the phone saves to the phone first and uploads when there is a connection. Receipt rows say "Waiting to upload" until they land. To check or push, open the More tab's Sync section and tap "Sync now".

WARNING

Signing out removes the phone's local copy, and anything not yet synced is discarded — you are asked first. Sync before you sign out.

3. What only the phone does

Automatic drive detection, live drive tracking, the review swipe, and the camera. Capture happens where you are — that is the phone's whole job.

4. What only the web does

Bank statement import, tax years and locking, creating clients and jobs, adding a place from pasted coordinates, and downloading the year archive to a computer. The bigger the screen, the better the review.

5. A rhythm that works

Capture on the phone the moment things happen: drives, receipts, quick money entries. Then sit down with the web once a month: Reports for the month, Trips for anything flagged, the tax pack when the year closes.

 Biz Flow Connect

My learning

Expense & Mileage

Leaderboard

Settings

 Demo

 My business

1 of 2 businesses

Overview

TRACK

Money

Trips

Receipts

Calendar

ORGANIZE

Clients & jobs

Vehicles

Places & rules

Budgets

Import

UNDERSTAND

Reports

Tax pack

Tax years

How it works

Profit & loss

Tax pack →

Mileage report (PDF)

←

August 2026

→

How the month actually went, against the month before. Every line is built from your ledger — change an entry and this page changes with it.

Income

\$1,800.00

Expenses

\$97.50

Profit

\$1,702.50

WHERE IT WENT

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

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

WHERE IT CAME FROM

Services

\$1,800.00

BY JOB, ALL TIME

Whether each piece of work actually paid, counting everything you tagged to it. Miles ride along as miles — they become dollars in the tax pack, at the rate for each trip's own date.