The Receipt Rescue System

Small Business Warchest -- Tool #002

THE BIG PICTURE -- SMALL HABITS, BIG IMPACT

Receipts might seem like small things, but losing track of them creates bigger headaches when it's time to organize your books, review expenses, or prepare for tax time. A simple system you can actually stick with beats a perfect system you never use.

MY CURRENT RECEIPT HABITS

Be honest -- where do your receipts live right now?

- ☐ Shoebox or drawer full of paper
- ☐ Crumpled in the truck console
- ☐ Photos on my phone, unsorted
- ☐ Sitting in my email inbox
- ☐ In an app, mostly
- ☐ Filed weekly, like clockwork

PICK YOUR SYSTEM

You don't need an expensive app or a complicated system. Pick one and stick with it:

- ☐ Dedicated folder (paper, one per month)
- ☐ Envelope system (one envelope per month)
- ☐ Phone app (snap a photo, file it on the spot)
- ☐ Cloud drive folder
- ☐ Bookkeeping software

My system choice: _____

ONE QUICK IMPROVEMENT I CAN MAKE TODAY

SHARP NUMBERS BOOKKEEPING

RECEIPT LOG & WEEKLY ROUTINE

WEEKLY RECEIPT ROUTINE

- ☐ Snap every receipt the day you spend
- ☐ File photos into your system once a week
- ☐ Match receipts to bank and card transactions
- ☐ Back up digital copies monthly
- ☐ Clear the pile to zero every week

RECEIPT LOG

Date	Vendor / What it was	Amount	Category	Filed

MY 15-MINUTE MISSION

Set aside 15 minutes, gather the receipts you currently have lying around, and decide where they belong from now on.

Receipts gathered: _____ My target date: _____

> *Rescue Tip: Good receipts don't just save you money. They give you peace of mind.*

You build it. We'll keep it on track.

Sharp Numbers Bookkeeping | Pueblo West, CO | 719-248-8918 | www.sharpnumbers.pro | Support@sharpnumbers.pro

Book a free strategy session: calendly.com/sharpnumbersbookkeeping