TallyBox User Guide

Receipts, GST, BAS and invoices for Australian sole traders — set up in two minutes.

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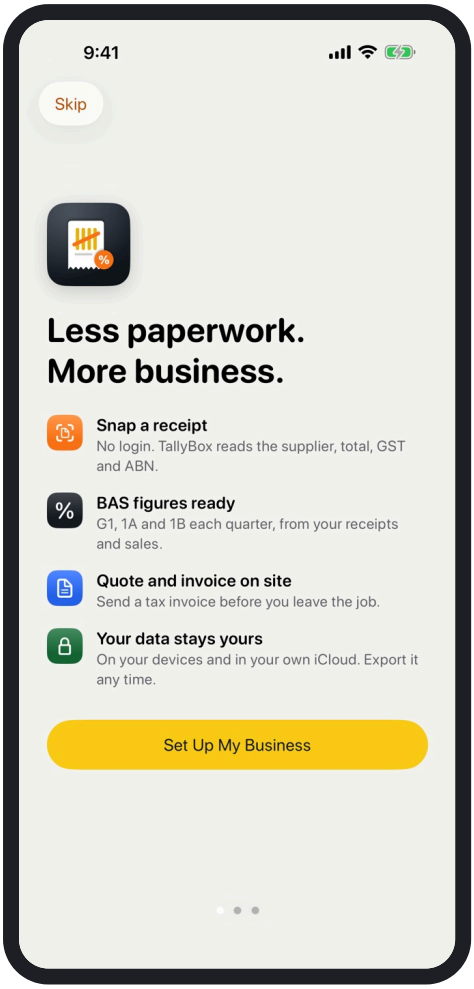
TallyBox 1.0 · TECHBOOSTER PTY LIMITED · support@techbooster.com.au

TallyBox prepares your figures; it doesn't lodge your BAS or give tax advice. Talk to your accountant or registered tax agent about your situation.

01 · GET STARTED

Two minutes to set up

There's no account to create and nothing to sign in to. Open TallyBox and it walks you through three short screens.



The first screen you see

1. **Tap Set Up My Business.** Or tap **Skip** and do it later in Settings.
2. **Enter your business name and ABN.** They're printed on your invoices. A green tick means the ABN is valid.
3. **Say whether you're registered for GST.** If you are, choose whether you lodge your BAS quarterly or monthly.
4. **Start the free trial, or tap Not Now.** Every Pro feature is free for 90 days. You won't be charged when it ends.

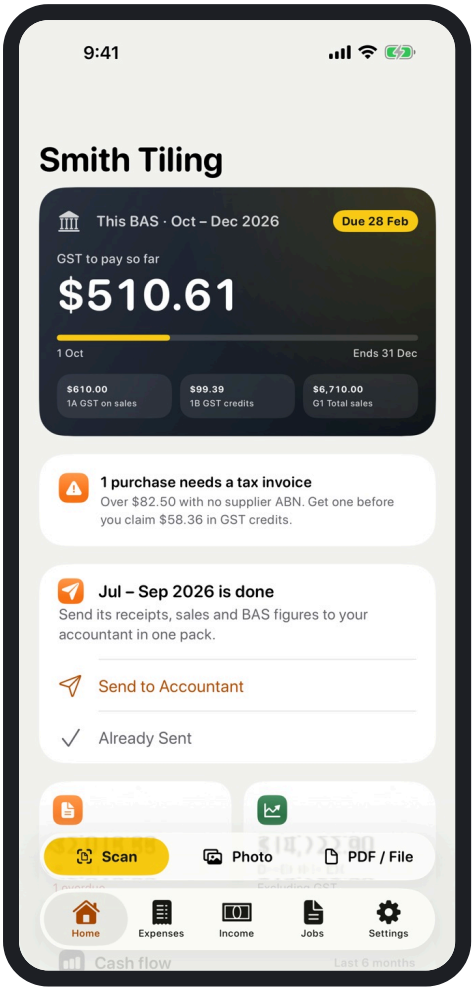
Coming from ReceiptsBox? If you use ReceiptsBox with iCloud Backup on, Home offers to bring your receipts across with their photos. You can also do it any time in Settings → Import from ReceiptsBox.

Not registered for GST yet? Turn it off. TallyBox hides the GST fields and keeps an eye on your sales against the $75,000 threshold for you.

02 · FIND YOUR WAY AROUND

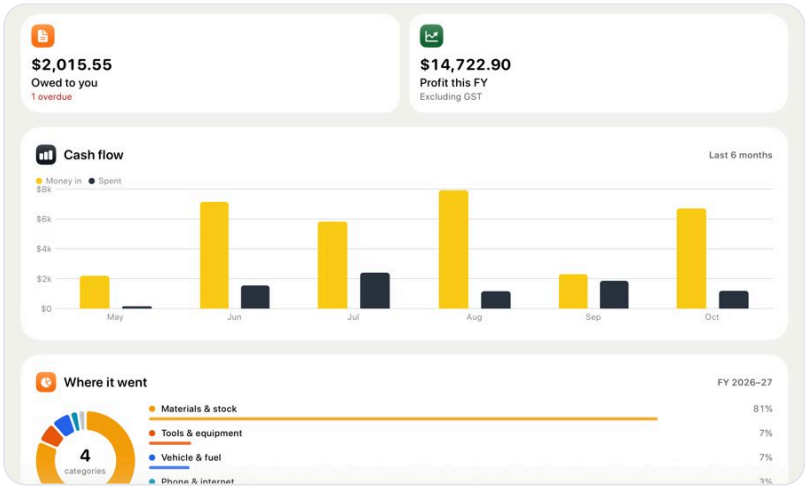
Five tabs, and a scan button everywhere

The bar above the tabs — the yellow **Scan** button, **Photo** and **PDF / File** — is on every screen, so a receipt is always one tap away. Each tab opens with a dark card holding its most important number.



Home

TAB	WHAT IT'S FOR
Home	This period's BAS — the GST you'll pay or get back, how far through the period you are and when it's due — then anything to fix, what you're owed, your profit this year, a six-month cash-flow chart and where your money went.
Expenses	This month's spending and GST credits, then every receipt by month. Tap a category chip to see just that category.
Income	Money received this month, then every payment and sale.
Jobs	What you're owed and what's overdue, then your quotes and invoices.
Settings	Your business details, reports, the vehicle logbook, your accountant, backup and Pro.



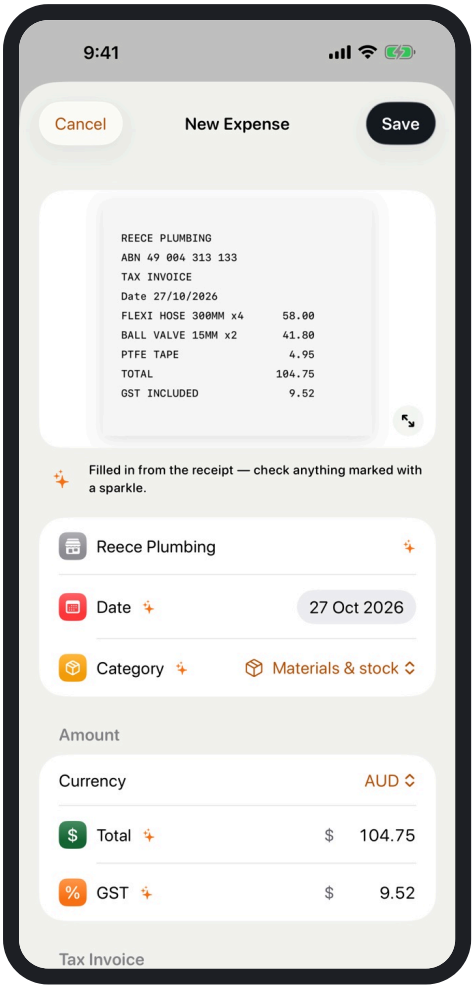
Further down Home: what you're owed, profit this year, cash flow and where it went

On iPad the tabs become a sidebar, and keyboard shortcuts work: ⌘N new expense, ⇧⌘N new income, ⌘↩ save.

03 · ADD A RECEIPT

Snap it, check it, save it

TallyBox reads the receipt for you. Nothing is saved until you tap Save, so you're always in charge of what goes in.



The form fills in from the receipt

1. **Tap the yellow Scan** and hold the camera over the receipt. It snaps when the edges are found. Add more pages for a long receipt, then tap **Save** in the scanner. Already have it? Use **Photo** or **PDF / File**.
2. **Check the details.** The receipt is shown at the top — tap it to zoom. Supplier, date, category, total, GST and the supplier's ABN are filled in, each marked with a small orange sparkle ✦ until you change it. Fix anything that's wrong.
3. **Check the GST.** If TallyBox couldn't read it, tap **All taxed** (1/11th of the total) or **No GST**. It never guesses for you.
4. **Set business use** if you also use it privately — a phone used 60% for work, for example. You'll see the GST credit and the deductible amount.
5. **Tap Save.**

Over $82.50? To claim the GST you need a tax invoice showing the supplier's ABN. If there's no ABN, TallyBox warns you so you can ask the supplier for one.

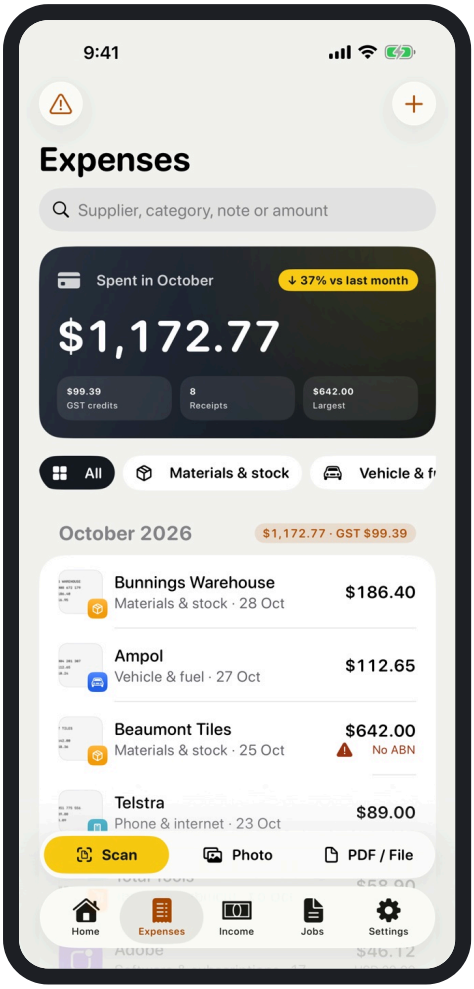
Overseas purchase? Choose the currency, enter the amount on the receipt, then the AUD amount from your bank statement.

Emailed bills: in Mail, open the PDF, tap Share, then TallyBox. It's waiting next time you open the app.

04 · EXPENSES

Everything you've spent, by month

The card at the top shows this month's spending, its GST credits and how it compares with last month. Below, each month shows its total and GST.



Expenses

1. **Tap an expense** to see the receipt and change it. Tap the receipt picture to view it full screen.
2. **Tap a category chip** — Materials, Vehicle & fuel… — to see just that category, or **search** by supplier, note or amount.
3. **Tap the ⚠ button** (top left) to see only what needs attention: purchases over $82.50 with no ABN, and imported receipts whose GST needs checking.
4. **Tap +** to add an expense without a receipt.
5. **Swipe left to delete.** Deleted expenses stay in Settings → Recently Deleted for 30 days.

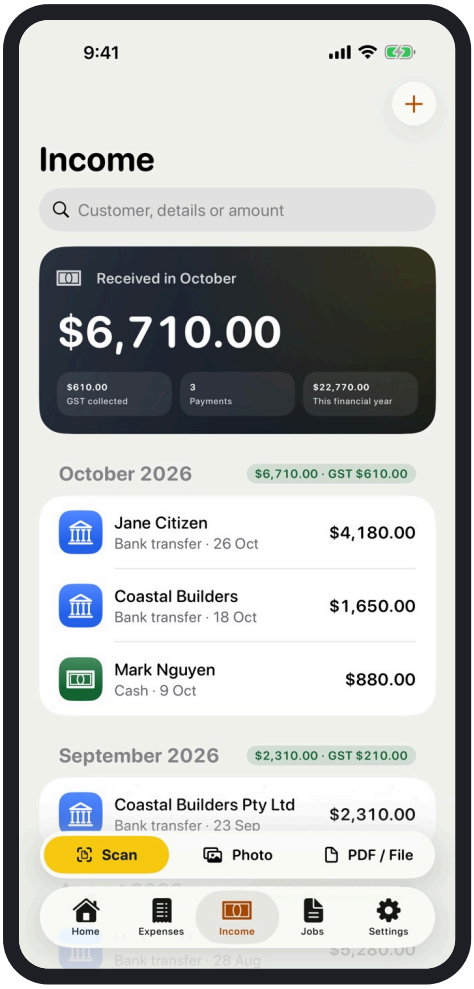
Categories follow the ATO's labels, so your accountant can use them straight away. Each has its own colour and icon, and TallyBox remembers the category you chose for each supplier.

Also employed? Work-related expenses as an employee (D1–D5) have their own categories. They're kept out of the business's BAS and profit, ready for your own tax return.

05 · INCOME AND SALES

Record what comes in

Payments on your invoices are added here for you. Add anything else yourself — a cash job, market stall takings.



Income

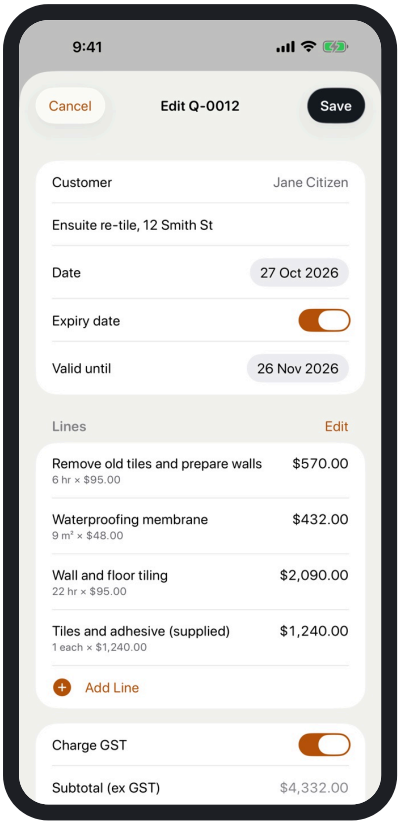
1. **Tap +** on the Income tab.
2. **Enter the amount received** and, if you like, the customer and what it was for.
3. **Set the GST:** tap **Taxable sale** (1/11th) or **GST-free**.
4. **Choose how you were paid** and tap **Save**.

Need to give a receipt? Open a saved sale and tap **Share Receipt** for a PDF receipt (a tax invoice / receipt if you're registered for GST).

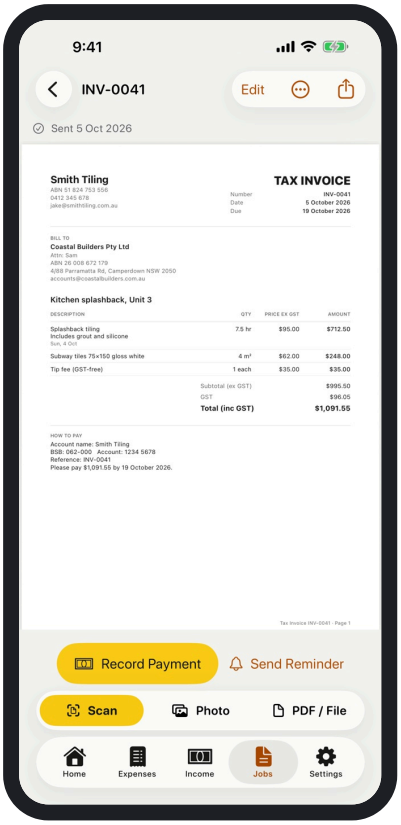
06 · QUOTES AND INVOICES

Quote on site, invoice in one tap

Everything works offline. Invoices meet the ATO's tax invoice rules and show how to pay you.



Writing a quote



The invoice your customer gets

1. **Jobs → + → New Quote** (or New Invoice). Choose the customer and name the job.
2. **Add Line** for labour or materials. Labour can use start and finish times — 1 hour 30 is 1.5 hours. Save rates you use often as items.
3. **Save, then Send.** Mail opens with the customer's email and the PDF attached.
4. **Quote accepted?** Tap **Accepted → Invoice**. The same lines become an invoice.
5. **Paid?** Tap **Record Payment**. It goes into Income with the right GST, and the invoice shows Paid.

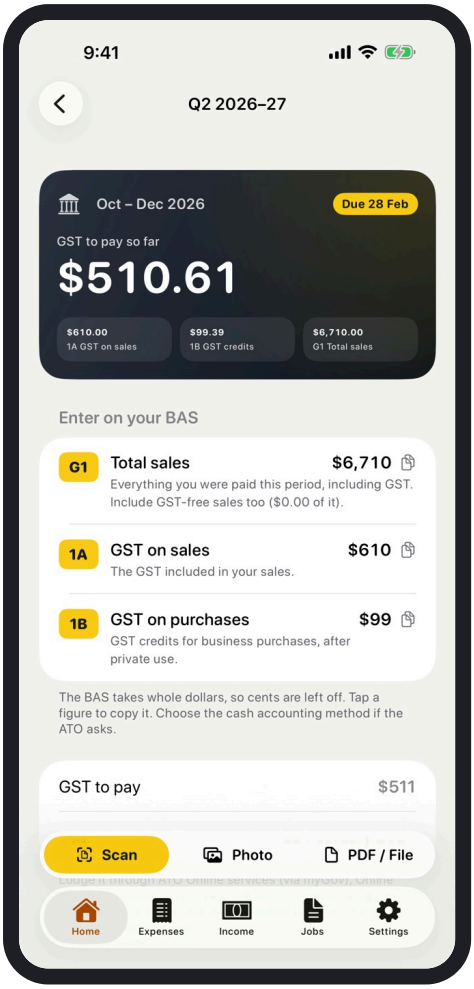
The Jobs card shows what you're owed and how many invoices are overdue. **Overdue** invoices are marked in red; tap **Send Reminder** for a polite reminder with the invoice attached.

Get paid directly: add your BSB, account and PayID in Settings → Contact & Payment Details. TallyBox never handles your money.

07 · YOUR BAS

Your BAS figures, ready to copy

TallyBox works out your BAS on a cash basis from the receipts and sales you've recorded: sales count when the money arrives, purchases when you pay.



The BAS guide

1. **On Home, tap the dark BAS card** for the current period, or a period under **Earlier BAS**.
2. **Copy each figure** into the matching box on your BAS — the yellow labels G1, 1A and 1B match the form. Tap a figure to copy it. Figures are in whole dollars, as the ATO asks.
3. **Lodge** through ATO Online services (via myGov), Online services for business, or give the figures to your BAS or tax agent.

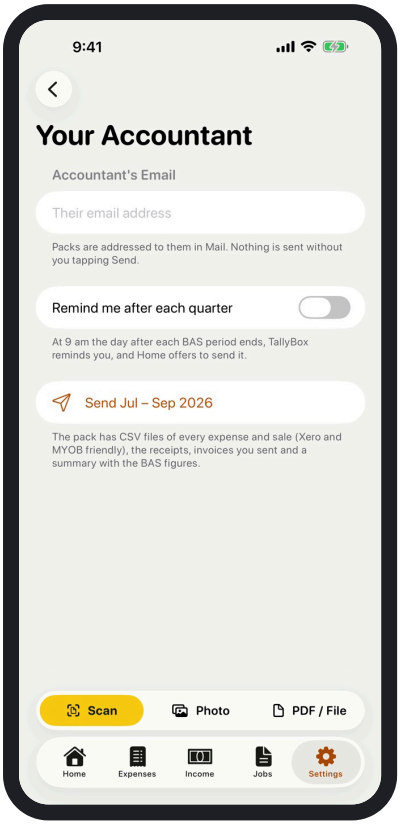
BOX	WHAT IT IS
G1	Total sales, including GST (and including GST-free sales)
1A	GST on your sales
1B	GST credits on your business purchases

Before you lodge: fix any purchases Home lists as missing an ABN — without a tax invoice, those GST credits may not be claimable.

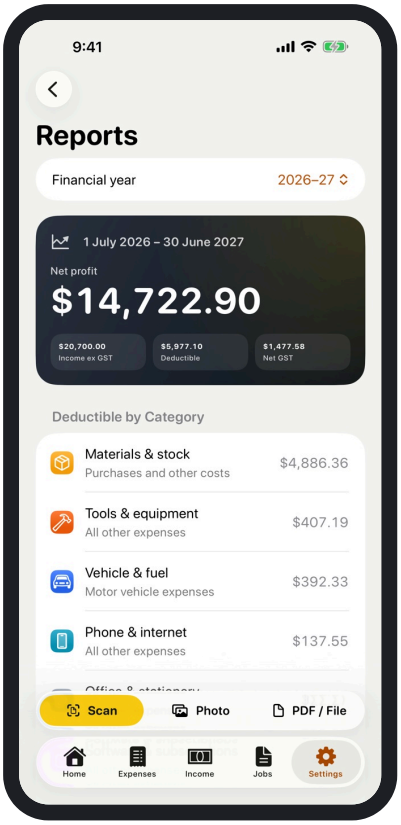
08 · YOUR ACCOUNTANT AND REPORTS

Hand everything over in one go

After each BAS period (or quarter), send that period's records to your accountant. At tax time, send the whole year.



Settings → Your Accountant



Settings → Reports & Export

Each period

1. **Settings → Your Accountant:** enter their email and turn on the reminder.
2. **When a period ends,** you're reminded at 9 am and Home shows **Send to Accountant**.
3. **Tap it.** Mail opens, addressed to them, with the pack attached. Tap Send.

At tax time

In **Reports & Export**, pick the financial year for the **Year Summary** PDF or the full **Accountant Pack**.

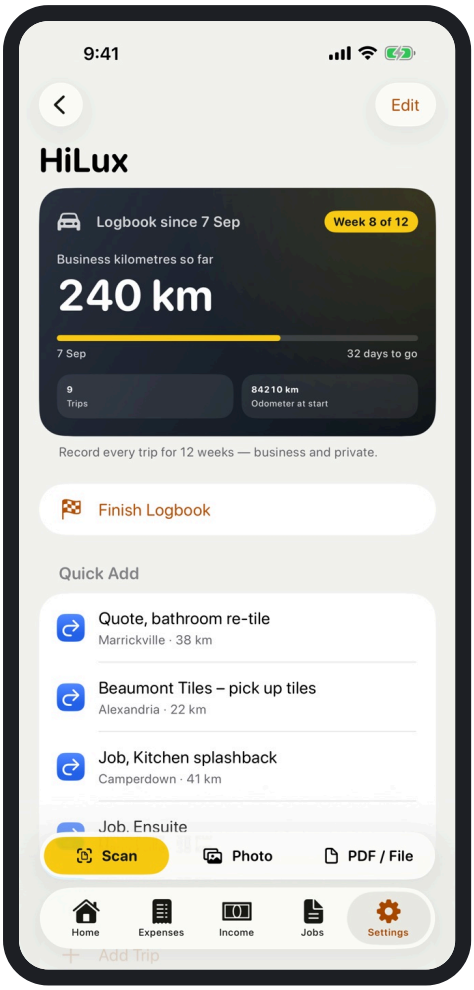
What's in a pack: CSV files of every expense and sale (Xero and MYOB friendly), every receipt, the invoices you sent, logbooks and a summary.

Check Bank Statement: import a CSV from your internet banking to find payments with no receipt and money in you haven't recorded. Tap one to add it.

09 · VEHICLE LOGBOOK

The ATO 12-week logbook

Keep it once, and its business-use percentage can be used for five years.



A logbook in progress

1. **Settings** → **Vehicle Logbook** → **+** to add your vehicle.
2. **Start 12-Week Logbook** and enter today's odometer reading.
3. **Add every trip** for 12 weeks — the card shows which week you're up to and your business kilometres so far — business and private. Business trips need a purpose. The next trip starts from the last odometer reading; tap a **Quick Add** route to repeat a trip.
4. **Finish Logbook** after 12 weeks with the odometer reading. TallyBox works out your business-use percentage.

Fuel and car costs: when you add a Vehicle & fuel expense, tap **Use logbook** to apply your business-use percentage.

Never forget a trip: in the Shortcuts app, create an automation "When CarPlay connects → Log a Trip in TallyBox".

10 · SHORTCUTS

Faster than opening the app

Get to the scanner in one press, from wherever you are.

Lock Screen and Home Screen

Touch and hold the Lock Screen or Home Screen, tap **Edit** / **Customise**, add a TallyBox widget. The Home Screen widget shows this period's BAS and a Scan button.

Control Centre

Open Control Centre, tap **+**, then **Add a Control** and choose **Scan Receipt**.

Action button

Settings app → **Action Button** → Controls → **Scan Receipt**. One press opens the scanner.

Siri

Say **"Scan a receipt in TallyBox"** or **"Log a trip in TallyBox"**.

From Mail, Files or Safari

Open a PDF or image, tap **Share**, then **TallyBox**. It opens for you to check next time you open the app.

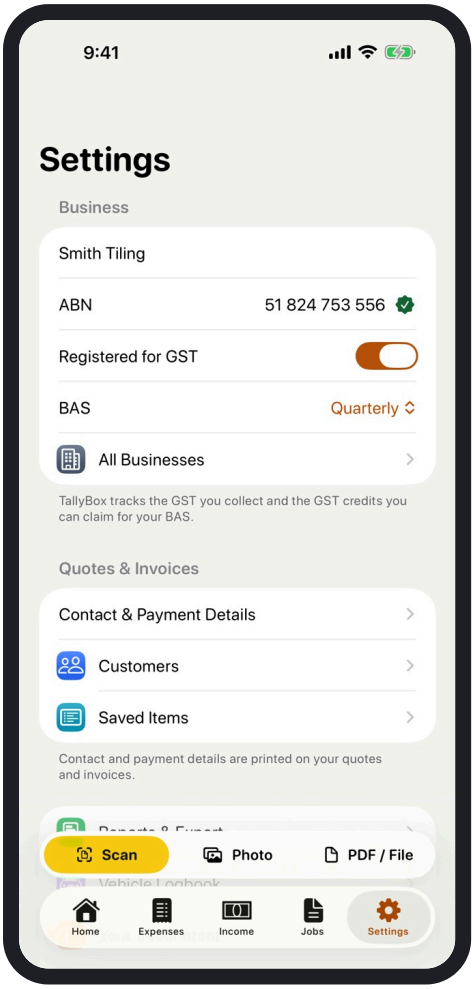
Receipts from staff

Staff photograph receipts and send them to you by Messages, email or AirDrop; you share them into TallyBox. They never see your books. See Settings → Receipts from Staff.

11 · YOUR DATA AND SETTINGS

Your records stay yours

TallyBox has no account and no server of its own. Your records are on your devices and in your own iCloud.



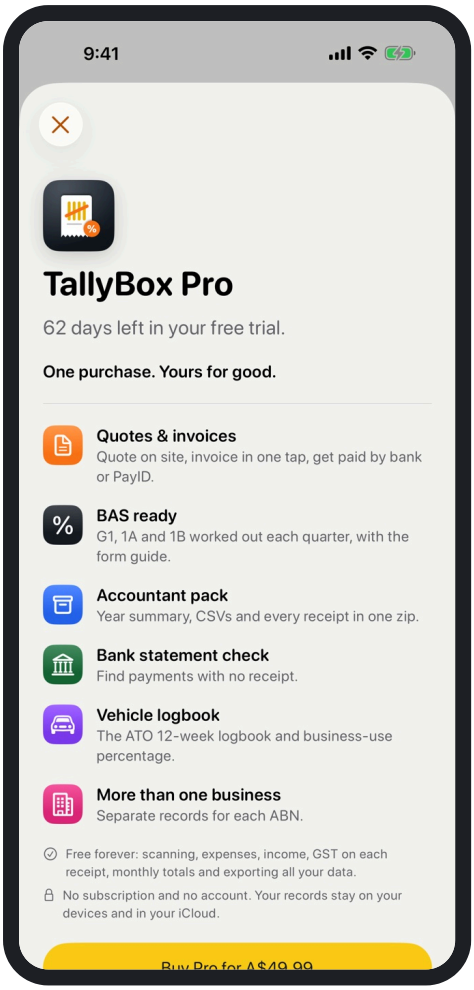
Settings

TO…	GO TO
Back up and sync to your iPad or Mac	Sign in to iCloud on each device. Settings shows when TallyBox last backed up.
Get back an expense or sale you deleted	Settings → Recently Deleted (kept for 30 days)
Keep a second business separate	Settings → All Businesses → Add Business. Switch from the button on Home.
Print your bank details and PayID on invoices	Settings → Contact & Payment Details
Save customers and labour rates	Settings → Customers / Saved Items
Take everything with you	Settings → Reports & Export → Export All Data — always free
Bring in ReceiptsBox receipts	Settings → Import from ReceiptsBox
Read this guide again	Settings → User Guide
Get help, or read the privacy policy	Settings → Help & Support, Email Support, Privacy Policy

No iCloud? TallyBox still works and keeps everything on the device; Settings shows "Saved on this device only".

12 · PRO, PRICING AND QUESTIONS

Free to use, Pro to save time



Settings → TallyBox Pro

FREE FOREVER	PRO
Scanning and importing receipts	Quotes and invoices
Expenses and income	BAS figures and guide
GST on every receipt	Accountant pack and year summary
Monthly totals	Bank statement check
Export all your data	Vehicle logbook
	More than one business

Try Pro free for 90 days. When the trial ends you're not charged; Pro features become read-only until you buy Pro once. No subscription, nothing renews, and nothing is ever deleted. Pro is shared with your Family Sharing group. Lost your purchase on a new device? Tap **Restore Purchases**.

Does TallyBox lodge my BAS?

No. It prepares the figures; you or your agent lodge them with the ATO.

Can my partner or bookkeeper use it too?

TallyBox is for one person. Send your accountant the pack each period, and have staff send you their receipts.

Does it connect to my bank?

No. For peace of mind, import a bank statement CSV instead to check nothing's missing.

Need help?

Email support@techbooster.com.au — a person reads every message.