

# Taxbot Quick Start Guide

## Homescreen

### Refresh Button

Connects with your Taxbot online account dashboard to upload information to the server.

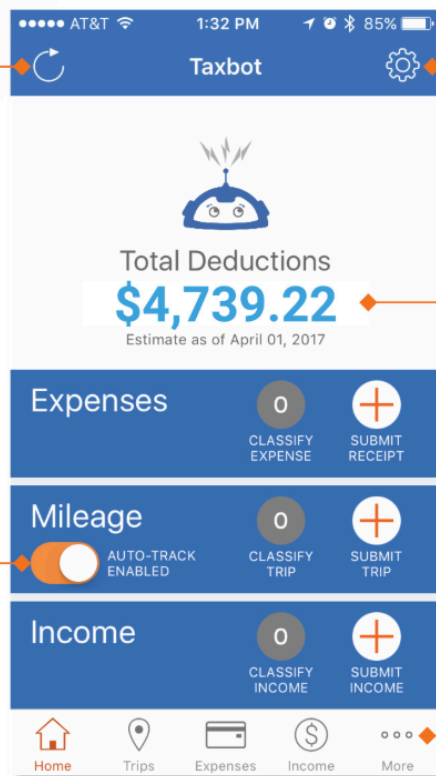
### Settings Button

Includes account info, vehicles, connected banking and email accounts, categories, and log out (if needed).

### Estimated Total Deductions

Based upon your entries, this number is only an estimate of what you have saved using the Taxbot app. Your actual deductions may vary.

### Automatic Mileage On/Off Toggle



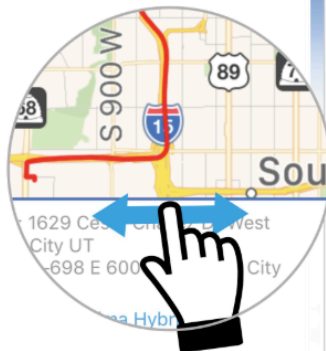
### More Section

Includes app tutorials, support and feedback contacts.

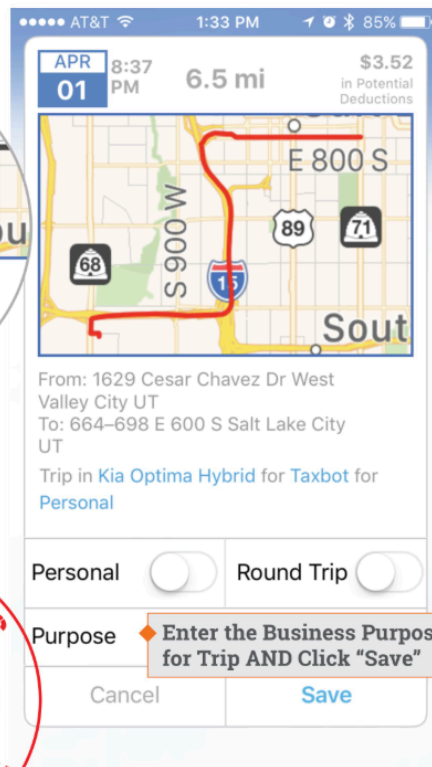
## Yes, it's this easy.

When you open Taxbot, just touch the button.

You can turn automatic tracking on or off at any time. But once you try it, we have a feeling that you'll like it.



**Classify with the swipe of a finger.**  
Swipe left for personal.  
Swipe right for business.



**Enter the Business Purpose for Trip AND Click "Save"**

## Mileage Tracker



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## Automatic Expense Tracking

Let SmartMatch do the work for you.

Once you snap a picture of your receipt, our new SmartMatch technology looks for the transaction in your connected bank and email accounts. When it's done, you simply classify the expense as business or personal. If more info is needed for compliance, the Taxbot app will let you know.

AT&T 1:33 PM 85%

FEB 12 Personal \$27.34

CONVENIENCE FOR YOU  
1515 SOUTH MAIN  
EDGE CITY US 04020  
855-482-9268  
STORE #04020  
OPEN 7 DAYS

1 Cheez-ItSrrchMix3.5z 2.298  
1 Egg Salad Sandwich 3.298

SUBTOTAL 5.58  
SALES TAX ON 3.29 0.23  
Food Tax ON 2.29 0.07  
TOTAL DUE 5.88  
DEBIT

ACCT#: \*\*\*\*\*4482  
ACCT TYPE: CDA  
APPROVAL#: 529279 AUTH CODE: 0  
APPROVAL TIME: 131920  
FID/Amount  
STORE#: 22099  
TERM#: 00072209934 08  
TERM SEG#: 957655  
REF#: 9500 91 066 4  
APPROVED

CUSTOMER AGREES TO PAY THE ABOVE  
TOTAL AMOUNT ACCORDING TO THE CARD  
HOLDERS AGREEMENT

T#02 0P44 TRN7386 07/21/2016 01:19 PM

Accounting for Taxbot for Personal

Total \$27.34

Vendor Convenience for You

Personal ☐

Cancel Save



## Personalization

AT&T 1:32 PM 85%

Done Settings

LOCATION

Select Country

USA Canada

YEAR START ODOMETER Add

Vehicle Kia Optima Hybrid

Odometer 15000.0 Add Info for Your Primary Vehicle

Year 2017

VEHICLES Add

Cadillac Escalade

Kia Optima Hybrid Default

Add Entries for All of Your Vehicles

AT&T 1:32 PM 85%

Done Settings

BUSINESS ENTITIES Add

My Business

Real Estate Mogul Default

Personal Add Business or Businesses

Medical

Charity

BANKS Connect Business Banking Accounts Add

CATEGORIES Personalize Your Categories

Manage Expense Categories >

Manage Income Categories >

SMARTMATCH Connect Your Business Email

Sync email >

PASSWORD

Change password >

LOGOUT AND CLEAR DATA

Logout

TAXBOT VERSION: 7.0 (31)



Need to make a change?  
Just swipe left and select edit or delete.

Remember:  
You can make changes any time you like.