LoftyBiz Accounts Tool Trial and Weekly Review Sheet

Pick one simple accounting tool you will actually open, connect the business bank (or import statements on a fixed day), and review the books every week. This is general education, not financial, legal or tax advice.

From LoftyBiz 175 — Accounting Software: Pick One, Connect the Bank, Review Weekly. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

Five things the tool must do

Must-have	Done?	Notes
Create an invoice		
Record a bill		
Connect or import the business bank		
Show a simple profit and cash view		
Let you export a report for an accountant		

That is enough. You are not buying a finance department in a box. You are buying a place for the books to live.

One-hour trial of two ordinary options

Trial check	Option A	Option B
10 sample lines (ten prepared sample transactions prepared in advance)		
Time to invoice		
Time to match a bank line		
Time to find last month’s profit		
Can you run it without a manual in your lap?		

The “winning” tool is the one you can run without a manual in your lap, not the one with the longest feature tour. Choose something widely used where you live, that your accountant can open, and that you can afford as a small ongoing cost.

Start date and the old file

Plan	Your notes
Start date (usually the first day of a month)	From 1 March, all books live in the accounts tool — visual example only
Old file: archive only	Do not run two live systems
New file: all new invoices	Enter opening balances with care
Tell your bookkeeper the start date in advance	So reports come from one place
One-line team rule	If a supplier asked to be paid, the bill had to be in the tool first

Bank feed and weekly review

Step	Rule
Business bank to feed or weekly import to accounts tool	The business bank only. No personal account.
Read-only as the bank and tool described	If a live feed is not available, import a statement every Monday
Forty minutes each Monday	Match payments, code bills, flag unknowns
Receipts	Photo or file, the same day, into the tool or a folder the tool can read
Monthly export pack	Profit view, invoices, and questions already noted

Official examples (not promises, and not tax advice)

Example	What happened in the story

Harper, landscaping firm, Nashville (USA)	One-hour trial of two ordinary options, using ten prepared sample transactions she prepared in advance. The first week felt slower. The fourth week was faster than her old patchwork, because she was no longer searching for the latest version of a file.
Yusuf, small after-school centre, Sacramento (USA)	He blocked forty minutes each Monday. In this example, month end shrank from a long evening to a short review, because most lines were already coded. He kept personal spending out of the business account.

These steps are illustrations, not a recommendation of a named product, and not a promise that a tool will cut your workload by a set amount. These are examples, not a promise of a shorter close in every business, and not tax advice.

Your task this week

Step	Done?
Write five things your accounts tool must do, and trial one or two options with a small sample of transactions	
Pick a start date and connect or import the business bank	
Put a weekly review in your calendar, and protect that slot as you would a client meeting	
If you work with an accountant, send them the start date and ask how they prefer the monthly pack	
Put that plan into Systex, so the whole team can follow the same steps	

Example figures, not targets or forecasts. General education, not financial, legal or tax advice. Results vary. These are examples, not promises.
Put the weekly books review into Systex, so the whole team can follow the same steps.