SMART WEBSITE DESIGNERS
www.smartwebsitedesigners.co.uk

1:1 MENTORING · SESSION GUIDE

Receipts, Expenses & Bookkeeping

Snap a receipt and it is logged. Simple ways to keep tidy books with QuickBooks, Xero or a spreadsheet, without the shoebox.

DURATION	FORMAT	INVESTMENT	INCLUDES
90 minutes	1:1 on Zoom or in Swansea	£175	Written action plan

For example: A mobile mechanic stops handing his accountant a carrier bag of receipts at year end.

Who this session is for

- Your receipts live in the van, your wallet or a shoebox
- You put off bookkeeping until the accountant chases you
- You want tidy books without becoming an accountant

By the end, you will

- Capture receipts with your phone in seconds
- Link your bank and accounts software so transactions flow in
- Use AI to sort and explain your spending
- Have a simple 15-minute monthly routine

What we will cover in 90 minutes

Every session is built around your business. Timings are a guide, and we always go at your pace.

0–10 mins	**Welcome and how you keep your books now** Receipts, invoices, bank and accounts: where it all lives.
10–30 mins	**Receipt capture** Apps that read your receipts for you.
30–50 mins	**Linking it up** Bank feeds and QuickBooks, Xero or a simple spreadsheet.
50–70 mins	**Using AI to make sense of it** Sorting spending, spotting oddities and plain-English summaries.
70–80 mins	**Your monthly routine** A 15-minute checklist you can stick to.
80–90 mins	**Your action plan and questions** Agree what you will try this week and ask anything you like.

What to bring

- Your phone and a laptop or tablet
- A handful of real receipts
- Your accounts software login, if you use one

What you will take away

- Receipt capture set up on your phone
- A bookkeeping setup that suits your business
- A 15-minute monthly checklist
- Your written action plan



YOUR MENTOR

Ian Brealey

Ian is a qualified tutor and Internal Quality Assurer (IQA) and a former Head of Training at Gower College Swansea. He has run Smart Website Designers for 10 years and uses AI and automation every day in his own business. He helps tradespeople, shop owners and service businesses save hours every week, and explains everything patiently, in plain English, at your pace.

How booking works

1

Book a free chat

A free 30-minute call to make sure the session is right for you.

2

Pick your date

Choose a time that suits you from Ian's live calendar.

3

Meet with Ian

On Zoom from anywhere, or in person in Swansea.

4

Get your plan

Receive your written action plan after the session.

Ready to book? smartwebsitedesigners.co.uk/business-mentoring

Questions first? Email ian@smartwebsitedesigners.co.uk or call 07305 319667

This is practical business mentoring. It is not financial, legal or tax advice; for those matters, please speak to a qualified adviser.