

How to Automate Your Bookkeeping in 2026

A practical, review-led guide for UK sole traders and small businesses

1.

Upload your bank statement

Download or export a supported bank statement, then upload it when you choose. LedgerlyPro imports supported statements and lets you review transactions before saving. This is not a live bank feed.

2.

Use AI-assisted categorisation

LedgerlyPro can help categorise imported transactions and receipt expenses using your records and suggestions. Review the categories before saving so you stay in control.

3.

Standardise your invoices

Use one invoice template with consistent numbering, due dates and payment terms. This makes chasing and reporting much easier.

4.

Keep records organised in one place

Keep invoices, expenses, receipts and mileage together so important records are easier to find when you need them.

5.

Check your numbers weekly

Spend 10-15 minutes each week reviewing new statement transactions, expenses and invoices instead of rebuilding your records at year-end.

6.

Stay tax-ready all year

Use your available records to review profit and planning estimates, then keep the supporting evidence organised for your own review or your accountant.

LedgerlyPro supports user-initiated statement uploads, reviewable AI assistance and organised bookkeeping records. It does not connect directly to your bank or automatically sync transactions.