



15-MINUTE WORKSHOP

A clearer receipt routine.

A practical session for people who already keep expenses in a spreadsheet. Everyone leaves with a working tracker and a repeatable review routine.

Bring

A laptop with Google Sheets or Excel. Use the supplied fictional receipts first. Keep any real receipt records in your own private copy.

Run the session

0-3 min

Make a copy

Open the free tracker. In Summary, select 2026 and USD. Confirm the sample total is 205.50 across four receipts.

3-6 min

Check the view

Switch to GBP: 107.00 across two receipts. Switch to EUR: 34.00 across one. Explain why different currencies are never added together.

6-10 min

Make it yours

In your own copy, clear Receipts rows 2 to 8. Keep the header and column order. Add one fictional receipt with a date, numeric price, currency and category.

10-13 min

Review the result

Choose the matching year and currency in Summary. Check the total and category. Show where the receipt-image link belongs.

13-15 min

Choose a routine

Agree when to add receipts and check the totals. Show the receipt-to-Sheets guide for optional phone scanning with Sheetify.

Before you finish

Check that each participant is editing their own copy, the examples are cleared, and the selected year and currency match their records. The starter supports up to 1,000 receipt rows.

Get the tracker and step-by-step instructions

sheetify.io/templates/self-employed-expense-tracker/