

Smartphone Apps for Tax Recordkeeping

It's easy to forget to track your mileage... it's easy to lose a receipt... or not document charitable contributions... etc, etc, etc. Smartphone apps can help by saving the information while it is still fresh in your mind.

Important note: This fact sheet is not about which specific apps are best. Rather, it is an overview of how apps can help you with recordkeeping. It is up to you to find your favorite app(s) that work with your type of smartphone.



Mileage Tracking:

Most mileage tracking apps use your smartphone's GPS to record the trips you make and then let you categorize them by business, medical, charity, or personal trips.

***What are some mileage app choices?** MileIQ, AutoKept, Everlance, Hurdlr, TripLog, Stride, SherpaShare... and more (search for "mileage tracking" in your smartphone's app marketplace)*

Business Income & Expense:

Most business tracking apps use your phone's camera, text, and voice recognition capability to capture and save income and expenses as they occur.

- Most business apps help you to categorize (and sub-categorize) your expenses.
- Many business apps also feature mileage tracking.
- Many business apps also feature time tracking to keep track of hours worked.
- Many business apps sync with your credit card statements to put all transactions into one place.
- Many business apps automate invoicing and billing (including accepting credit card payments).

***What are some business app choices?** FreshBooks, ZipBooks, Rydoo, Concur, Expensify, Shoeboxed, Zoho, Hurdlr, and more (search for "business tracker" in your smartphone's app marketplace).*

Other Tax Related Apps (smartphone and/or online):

Charity and Itemized Deductions: Helps keep track of charitable contributions, medical expenses, etc. (Example: *ItsDeductible*)

Receipt Saving & General Note Taking: Helps keep track of important receipts/forms before they get lost. (Examples: *Google Keep, EverNote, Microsoft OneNote*)

Cryptocurrency: Helps keep track of cryptocurrency gains/losses. This is important because most cryptocurrency platforms do not provide 1099-B tax forms. (Examples: *CryptoTrader.tax, CoinTracker.io*)

IRS Matters: The IRS has a smartphone app too. It's called IRS2GO. The app can check refund status, accept tax payments, and call IRS phone numbers with one click.