



TaxTracker - Getting Started Guide

Disclaimer: This guide is for informational purposes only and is not a substitute for professional tax advice or services.

TaxTracker does not replace the expertise of a Certified Professional Accountant (CPA) for tax filing. Tax estimates are based on the information you provide and are intended to give you an approximate understanding of what you may owe.

Personal deductions beyond standard federal and provincial credits are not factored into this software.

Step 1: Create Your Account

1. Visit www.taxtracker.ca
2. Click Sign Up and enter your email and password.
3. Check your email to verify your address.
4. After verification, you'll be directed to activate your free trial.

Step 2: Activate Your 30-Day Free Trial

1. After verifying your email, you'll be taken to a secure Stripe checkout page.
2. Enter your payment information. You will not be charged until the trial ends.
3. Enjoy uninterrupted access to TaxTracker during your free trial.

Why do we collect your card?

To ensure your access continues seamlessly after the 30-day free trial, we collect payment information upfront. You can cancel anytime from your Account page before the trial ends. To view your trial status, click Manage Subscription in your Account.

Step 3: Set Up Your Account

Once subscribed, you'll be prompted to:

- Enter your business name
- Select your province or territory

Why this matters:

TaxTracker uses federal and provincial tax rates and income credits specific to your region. If your income is



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below your province's tax credit threshold, you may see \$0 tax owing early in the year this is normal.

You should also include any other income (such as a salary) that has already been taxed. This helps determine the correct tax bracket for your business income and ensures accurate tax estimates.

Step 4: Explore Your Dashboard

Once inside, your dashboard allows you to:

- Track monthly business income
- Enter eligible expenses based on CRA categories
- Log home office and vehicle use
- View your estimated tax owing, updated automatically
- Export your data as CSV or PDF
- Log key business activities like mileage, meals, travel, and more

Add TaxTracker to Your Phone

You can add TaxTracker to your home screen for quick, app-like access no downloads needed!

iPhone / iPad:

1. Tap the Share icon in Safari
2. Scroll down and tap Add to Home Screen
3. Tap Add

Android:

1. Open Chrome
2. Tap the three dots menu in the top right
3. Tap Add to Home screen
4. Tap Add



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Once added, just tap the icon and you'll be automatically signed into your dashboard.

Pause or Cancel Anytime

Need a break? You can pause your subscription anytime from your Account page. Your data will be saved and you can return later without losing anything.

If you prefer to cancel and delete your account completely, contact our support team. We'll permanently remove all of your information from our system. Please note that once deleted, your data cannot be recovered.

Tips for Success

- Log income and expenses weekly
- Use the Logs tab to track meals, driving, inventory, and more
- Enter other income (e.g., salary) to ensure accurate tax brackets
- Always select the correct province or territory
- Export your data before tax season for easier filing

Stay in the Loop

Every Friday, we'll send a quick newsletter with:

- A reminder to log your week
- Seasonal tax tips
- CRA deadlines and deduction tips

Need Help?

- Visit your Account page
- Click Contact Support
- Submit a request we're happy to help!