

Transaction Categorizer

Finance & Accounting

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Auto-suggests chart-of-account codes for a batch of raw transactions, flagging GST-input eligibility and disallowed items, with review flags for ambiguous ones. Use it to speed up bookkeeping. For a full quality review, use the Bookkeeping Review; to design the chart itself, use the Chart-of-Accounts Designer.

Purpose of this tool & output

Auto-suggest chart-of-account codes for a batch of raw transactions

How the output is used

Use it to auto-suggest chart-of-account codes for a batch of raw transactions, speeding up your bookkeeping.

Important cautions

Suggested coding — a bookkeeper should confirm before posting.

Companion documents

- Bookkeeping Review
- Bank Reconciliation Assistant
- Month-End Close Checklist Generator
- Chart-of-Accounts Designer
- GST Input-Credit Reconciliation
- Trial-Balance Anomaly Detector

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.