Getting started with WIPKeep

Your first ten minutes: create your account, set your business year, record what your business has today, and attach your receipts.

You describe what happened in your business in plain English, WIPKeep drafts the bookkeeping entry, and nothing is saved until you approve it. That is the whole system: **you talk, you check, you approve.**

Step 1. Create your account

1. Go to **app.wipkeep.com**. You will land on the sign-in page. Click **Sign up**.
2. Enter your email and choose a password. The checklist under the password box turns to check marks as you type.
3. Tick the Terms box, complete the quick verification, and click **Create Account**. (Prefer Google? **Continue with Google** signs you up in one step and skips the email confirmation.)
4. Check your inbox for the confirmation link and click it. The link signs you in. If it does not arrive, look in spam, or use **Resend confirmation email** on the sign-in page.
5. Two short screens finish your profile: your name, your business name, and your state (sole proprietor? your own name works fine as the business name). The second screen is optional and you can **Skip for now**.
6. You will land in the app, signed in. The Free Starter plan is already active from the moment your account exists, with no card and no checkout. Prefer a paid plan? Open **Plans and Pricing** in the app any time; paid plans begin with a 15-day trial, a card is required to start one, and you will not be charged if you cancel within the first 15 days.

A welcome message will offer to show you around. Click **Show me** and WIPKeep takes you straight to the one thing to do first.

Step 2. Set your fiscal year (do this first)

Your fiscal year is the 12-month cycle your reports are built on. WIPKeep asks for it before your first entry, and the Transactions page stays closed until it is set.

1. Open **Tools** in the sidebar. The **Fiscal Year Settings** card is marked **“Start here”**.
2. Pick your **Start Month** and **Start Year**. Most small businesses use January of the current year. If your business year runs April to March or another cycle, pick that starting month instead.
3. Click **Save Fiscal Setting**. A green note confirms you are ready, with a **Go to Transactions** button.

One thing to know before you save: once you start recording entries, the fiscal year is locked. This protects your reports from being reshuffled later. If you are not sure, January is the safe, common choice.

Step 3. Record the money your business already has

Your first entries tell WIPKeep what your business owns today: the balance in your business checking account, savings, and any cash you keep on hand. These are called opening balances, and WIPKeep makes them the easiest entries you will ever make.

1. Open **Transactions**. Above the message box you will see ready-made examples. Tap the first one: *"My business checking account has $5,000 as of today"*. Tapping an example only fills in the message box, with the dollar amount pre-selected, so just type your real balance over it and press send. Nothing is saved until you approve.
2. WIPKeep stages a draft entry and shows it to you as a card marked **Pending Approval**, with a plain-English explanation of what the entry does. Because this is your first entry, it will also mention that it is creating your first accounts. That is normal.
3. Check the amount and the date, then click **Approve**. Your first entry appears in your Business Journal. If anything looks off, click **Reject** and simply re-type what you meant.
4. Repeat for your other balances, in the same plain style: *"Business savings has $2,000"* or *"I keep $300 cash for the business"*.

Tip: name the place the money sits, using the words **checking**, **savings**, or **cash**, like the examples above. If you word it as money you put in, for example "I deposited $2,000 of my own money into the business", WIPKeep asks one quick question: where did the money land? Reply **1** for business checking, **2** for business savings, or **3** for cash, and the draft appears.

Every entry you approve is listed in your **Business Journal** on the Transactions page, and you can download your full **Business Ledger** from the Reports page any time.

Step 4. Attach receipts

You can attach a copy of a receipt, an invoice you received, or a bill to any transaction. PDF and photo files (JPEG, PNG) work: photos up to 5 MB, PDFs up to 10 MB and 5 pages. There are two ways to do it.

While you are recording the transaction

1. On the Transactions page, click the dark **+** button at the left edge of the message box (it is labeled **Upload Receipt / Invoice** when you hover).
2. Pick what the document is (**Receipt**, **Invoice**, **Bill**, or **Other Expense**), then choose the file.
3. A green note confirms the file is queued. Now type the transaction as usual and click **Approve** on the draft.
4. The file attaches itself to the entry you just approved, and the entry gets a green **Receipt** badge in your journal. (If you reject the draft instead, the queued file is discarded, just attach it again with your next try.)

After the transaction is already saved

Every entry in your Business Journal prints its own **Transaction ID** next to the date. That ID is how you point WIPKeep at an older entry.

1. Copy the Transaction ID from the journal entry. (Right after you approve an entry, WIPKeep fills the ID in for you.)
2. In the **Transaction Tools** card on the same page, paste it into the **Transaction ID** field.
3. Click **Upload Receipt / Invoice**, pick the document type, and choose the file. It uploads right away.

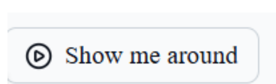
Finding your receipts later

The **Uploaded receipts / invoices** card at the bottom of the Transactions page lists everything you have attached. Filter by vendor, date, or transaction, then use **Review** to open a file or **Download** to save a copy.

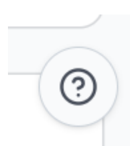
The app teaches as you go

The small ? icons. Next to almost every section and button you will find a small question-mark icon. Hover over it for a one-line explanation of that specific function, or click it to open a fuller note at the side of the screen.

Show me around. Many modules have a **Show me around** button at the top of the page. Click it for a short guided walkthrough of that module. After the first run it changes to **Replay tour**, so you can watch it again whenever you like.



The round ? button in the bottom corner. This is your setup checklist and guided tours. While you are new it appears as a **Get started** button showing your progress; later it tucks away into a small round **?**. Open it any time to run the product tour or a tour of any module.



More, by plan. Features and reports unlock by subscription plan. Anything your plan does not include stays visible but marked with the plan that includes it, and the **Plans and Pricing** page in the app always lists exactly what your subscription covers.

Good to know, whatever your plan

- Each message you send uses one prompt from your plan's allowance, including short replies like answering 1, 2, or 3 to a question. Approving or rejecting a draft costs nothing.
- Your plan's allowances and features are always listed on the **Plans and Pricing** page inside the app.
- Whatever happens with your plan, your books and data stay exactly where they are.

Stuck on anything?

Write to **support@wipkeep.com**. A real person reads it.

Guide updated August 2026. The latest version always lives at **wipkeep.com/getting-started**.