

FOR IMMEDIATE RELEASE

Budgetly introduces AI Bookkeeping to eliminate manual repetitive tasks for Australian SMEs

Intelligent categorisation, GST capture and receipt checks to keep records accurate and audit-ready in real time.

Brisbane, Australia — 13 July 2026 — Budgetly, an Australian spend management platform for SMEs, today announced **AI Bookkeeping**, a new feature that eliminates the manual bookkeeping work that drains finance teams. Designed for business owners and finance professionals, AI Bookkeeping replaces repetitive transaction coding with intelligent categorisation, tagging and receipt checks. This enables teams to spend freely and finance to stay on top of the accounts, without the month-end clean-up.

AI Bookkeeping removes manual tasks like category review, receipt checks and GST extraction, so records stay accurate and audit-ready from the moment a transaction lands.

Routine work is handled automatically, while exceptions, such as receipts that fail a check, are flagged for review and verification by authorised roles, including admins and accountants.

AI Bookkeeping assesses each new transaction as it's created. When it can determine the correct treatment, it applies the right category, tags and GST automatically. When a transaction is ambiguous, it holds back rather than guessing, so Finance stays in control and errors don't creep into the books. Decisions are based on the business's transaction data, configuration and historical patterns.

"The finance function is shifting from recording what happened to shaping what happens next, and that only works if the repetitive coding stops eating the day," said *Lisa Callaghan, CFO at Budgetly*. "The point of automating it isn't to remove people. It's to free them for the work that genuinely needs judgement. The systems that will matter are the ones that know when to act and, just as importantly, when to hold back and flag something to a human."

"AI Bookkeeping has significantly streamlined our bookkeeping processes," said the Finance team at Family Centered Support Services. "Tasks that were previously time-consuming are now completed far more efficiently and with greater confidence. It has saved our team approximately five to six hours on receipt reviewing and verification, time we've been able to redirect towards supporting our clients."

Key AI Bookkeeping benefits include:

- **Less time spent on manual transaction coding.** Categories and tags are applied automatically, reducing the admin workload across the month and freeing finance teams for higher-value work.



- **Faster resolution of receipt issues.** Receipt-required transactions show a clear **Verified** or **Flagged** status, so finance teams know exactly which receipts need attention without reviewing every transaction manually.
- **Month-end that's a review, not a reconstruction.** Records are built accurately as spend happens, so close is faster and more reliable.
- **Improved consistency.** Standardises how transactions are coded across teams, so reporting is cleaner and close is faster.

AI Bookkeeping is available to all Budgetly customers on Essentials, Premium and Enterprise plans from 13 July 2026. Full pricing details are available at budgetly.com.au/pricing.

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About Budgetly

Budgetly is a real-time spend control system built for Australian SMEs. It controls how money leaves a business by replacing reimbursements, shared cards, and manual spend workflows with budget-led controls, approvals, and audit-ready accountability, so teams can spend with confidence.

Budgetly helps finance teams prevent overspending before it happens, eliminate manual finance work, and maintain real-time visibility across card and bill spend. Every transaction is recorded with traceability by default, reducing month-end workload and strengthening financial controls as spending decentralises.

Budgetly supports 20,000+ users and has processed 2M+ transactions and \$1.5B+ in payment volume.

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