

# 9

## Facts, Figures, and Finances – Tracking Your Expenses



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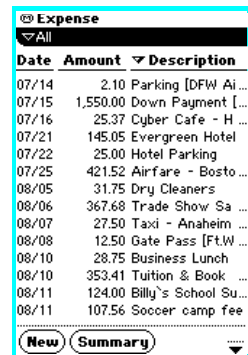


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## Introduction

This chapter tells you how to use Avigo's **Expense** application to record, categorize, compute, and report expenses. **Expense** lets you:

- ◆ Define up to eight categories of expenses, such as Business, Personal, Household, Family, Vacation, etc.
- ◆ Define up to eight custom fields for the expense form.
- ◆ Sum expenses by category, payment method, and date.
- ◆ Generate an expense report and export it to a file for printing or electronic distribution from your PC.



Expense		
▼ All		
Date	Amount	Description
07/14	2.10	Parking [DFW Ai ...
07/15	1,550.00	Down Payment [ ...
07/16	25.37	Cyber Cafe - H ...
07/21	145.05	Evergreen Hotel
07/22	25.00	Hotel Parking
07/25	421.52	Airfare - Bosto ...
08/05	31.75	Dry Cleaners
08/06	367.68	Trade Show Sa ...
08/07	27.50	Taxi - Anaheim ...
08/08	12.50	Gate Pass [Ft.W ...
08/10	28.75	Business Lunch
08/10	353.41	Tuition & Book ...
08/11	124.00	Billy's School Su ...
08/11	107.56	Soccer camp fee

Buttons: New Summary

## Adding Expense Entries

1. Tap the **expense** icon at the bottom of the Avigo screen to display the **Expense** screen.
2. Open the **Primary** list box and choose or create an **Expense** category for the new **Expense** entry.

**Note:** The first time you view the category list, a default category called **unfiled** will be displayed. If you want to change the name of this category or create new categories, see *Adding and Editing Categories* in *Chapter 2: Quick Start Short Cuts*.



**New Expense**

Envelope: ▼ Dealer trip

Date: Aug 12, 1998

Amount: 122.75

Type: ▼ Oil

For: \_\_\_\_\_

Mechan: \_\_\_\_\_

Location: Dallas - Houston

Method: ▼ American Express

Note: \_\_\_\_\_

You can define up to eight categories of expenses. Common uses of **Expense** categories include:

- Assigning one for each trip or expense account you may have.
  - Separating personal expenses from business expenses
3. Tap **(New)** to add a new **Expense** entry. The **New Expense** screen will be displayed.
  4. Confirm or change the date of the **Expense**.
  5. Enter the amount of the **Expense**.
  6. Tap on the ▼ to display the list after **Type**.
  7. Select an **Expense** type.

**Note:** You may edit items associated with this default list field if desired. (See *Adding and Editing Custom Fields* in *Chapter 2: Quick Start Short Cuts*.)

8. Enter a **Description** of the expense.
9. If desired, enter name of **Merchant** and/or **Location** of expense.
10. Open the list box after **Method** to select a payment method.  
**Note:** You may add or edit items associated with this default list field if desired. (See *Adding and Editing Custom Fields in Chapter 2: Quick Start Short Cuts.*)
11. If desired, password-protect and hide the **Expense** entry.
12. If desired, enter additional information about the **Expense** entry in any custom fields you may have created. For more information on adding and editing custom fields, see *Adding and Editing Custom Fields in Chapter 2: Quick Start Short Cuts.*
13. Tap (✓) to save your changes or tap (✕) to return to the previous screen without saving your changes.

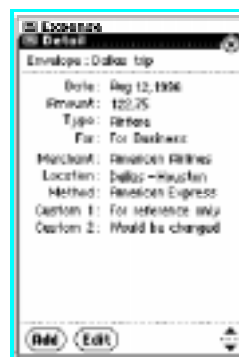


You may also create a new **Expense** entry by: displaying an existing **Expense** entry, opening the **Detail** menu and selecting **Duplicate entry**, and then changing the newly created duplicate entry as desired.

## Viewing Expense Entries

Viewing **Expense** entries is quick and easy. In **Expense** view, you can quickly change the **Expense** category in view by tapping on the **expense** icon. To display a detail view of an **Expense** entry, tap on the entry in the **Expense** view screen. If the entry is private, you will need to enter a password after opening the menu and selecting **Show private**.

1. Locate the **Expense** entry you want to view. If the entry is a private one, open the menu and select **Show private**. Enter a password when prompted to do so.
2. Tap on the **Expense** entry to display detail view.



Use Avigo to track your expenses for a month or two. You'll quickly see where your money goes and what you can do about it.

## Editing and Deleting Expense Entries

You can edit an **Expense** entry by using the on-screen keyboard. You can also edit an **Expense** entry by copying information from one **Expense** entry and pasting it into another. Deleting **Expense** entries is easily done by displaying the **Expense** entry, opening the menu and choosing **Delete entry**.

### To edit an Expense entry:

1. Locate and display the detail view of the **Expense** entry you want to edit. If the entry is a private one, open the menu and select **Show private**. Enter a password when prompted to do so.
2. Tap **Edit** at the bottom of the display to edit the entry.
3. Add, change, or delete information as desired.
4. Tap **✓** to save your changes or tap **✗** to return to the previous screen without saving your changes.

### To delete an Expense entry:

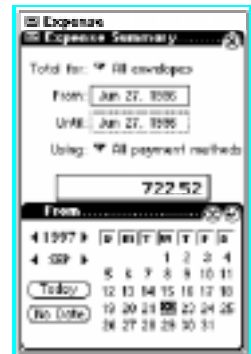
1. Locate and display the detail view of the **Expense** entry you want to delete. If the **Expense** entry is a private one, open the menu and select **Show private**. Enter a password when prompted to do so.
2. Open the **Detail** menu and select **Delete entry** to delete the **Expense** entry.
3. Tap **Yes** to confirm and complete the delete action.

## Creating Expense Summaries

You can create summaries of expenditures within categories accrued during specified periods of time. In the process of creating a summary report, various payment methods may be associated with each of the expense amounts. The expenses may then be totaled in terms of payment methods within categories.

To access the **Expense Summary** screen, tap **Summary** at the bottom of the **Expense** screen.

1. Open the list box next to **Total for** and choose the category of expenses you want to create a summary of.
2. Enter a start date for the summary report in the box to the right of **From**. In the **Date Picker**, use the **◀▶** arrows to the right and left of year and month to display the desired reporting period. Select the calendar date to choose the starting date.
3. Enter an end date for the summary in the box to the right of **Until**.



4. To select the payment method, open the list box next to **Using**. The default payment method is **All Methods**. If this default is selected, the summary will include all expenses within the defined period of time for the currently selected category.
5. To compute the expenses and create the summary, choose **(Solve)**.

**Note:** If desired, you can open the menu and tap **Copy** to copy the summary total. This value may be pasted in any text field by:

- Tapping on the field where you want to paste it.
- Opening the menu in the displayed keyboard and tapping **Paste**.
- Tapping **✓** to paste the value in the text field.



*Conquer those burdensome business expense reports. As you travel, track each expenditure with your Avigo wherever it is convenient — on the plane or train, or in your hotel room at the end of the day. Then transfer them to your PC when you return.*