

inExpense Manual

Getting started with inExpense

Main Features

Personal finance manager inExpense will help you organize your incomes and expenses in the most intuitive way. Yet it is very powerful, supporting multiple accounts (including mileage), currencies, text and graphic reports, desktop synchronization and many other useful features.

inExpense is a great tool for all the latest Palm handhelds and especially for Treo 650. You can enter new records, switch accounts and see reports without even lifting the stylus, all with your 5-way control, which is very important when managing expenses on the go.

You can track your mileage and transfer it to money. Just create mileage account and record your mileage as transactions.

You can see your incomes and expenses in the graphic form or in grouped text reports right on your Palm. inExpense built-in reporting engine supports different data ranges and category filters so you can have your money flow overview always at your eyes.

You have an ability to transfer all your expenses to the desktop on every synchronization in CSV and QIF formats with the conduit included (Windows only). Furthermore inExpense 2 has built-it feature to export data directly to the memory card in CSV format.

To ensure your data safety inExpense 2 offers you a full backup to the memory card feature additionally to the Palm standard backup-on-synchronization. Just a single tap and all your data will be transferred to the memory card to be restored later if needed.

inExpense helps protecting your sensitive information with a built-in password security feature. You can customize inExpense to ask for a password on every launch or after several minutes of inactivity, either way it will prevent others from browsing your data.

For inExpense installation you need to have Palm OS 4.0 or later handheld with 250K free memory. To synchronize transactions with your PC desktop HotSync version 4.0 or later is required. Mac desktop synchronization is not supported yet.

Installation

For Windows users: download **zip** archive, unpack it and run **setup.exe** program. The setup program will install inExpense application to your handheld and desktop conduit which gives an opportunity to transfer inExpense data to the desktop in CSV/QIF format.

For Mac users: download **sit** archive, unpack and install **inExpense.prc** to your Palm handheld.

Synchronize your Palm handheld to finish the installation.

Upgrading from version 1.x

Step 1: Before you upgrade Backup inExpense data to the expansion card.

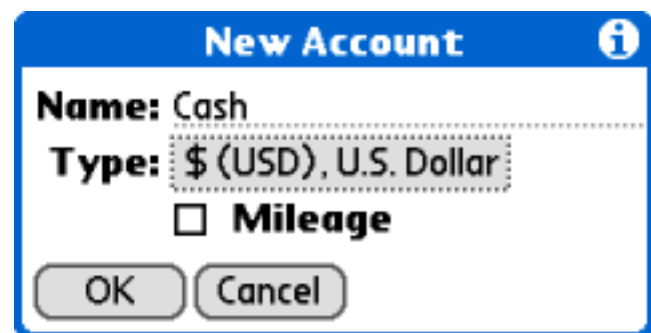
Step 2: Delete inExpense application and its preferences from the handheld.

Step 3: Install new version. Run inExpense application and Restore saved data from Backup.

Quick Tutorial

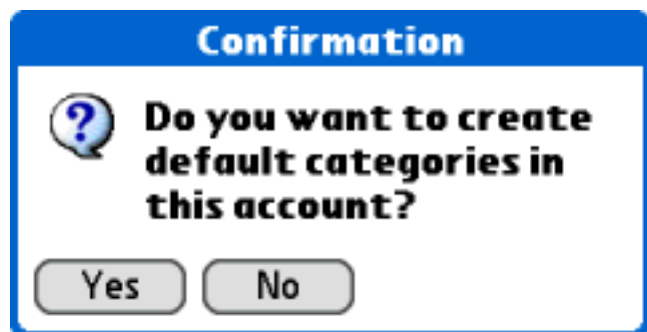


When you first start inExpense it offers to create at least one account to record expenses in.



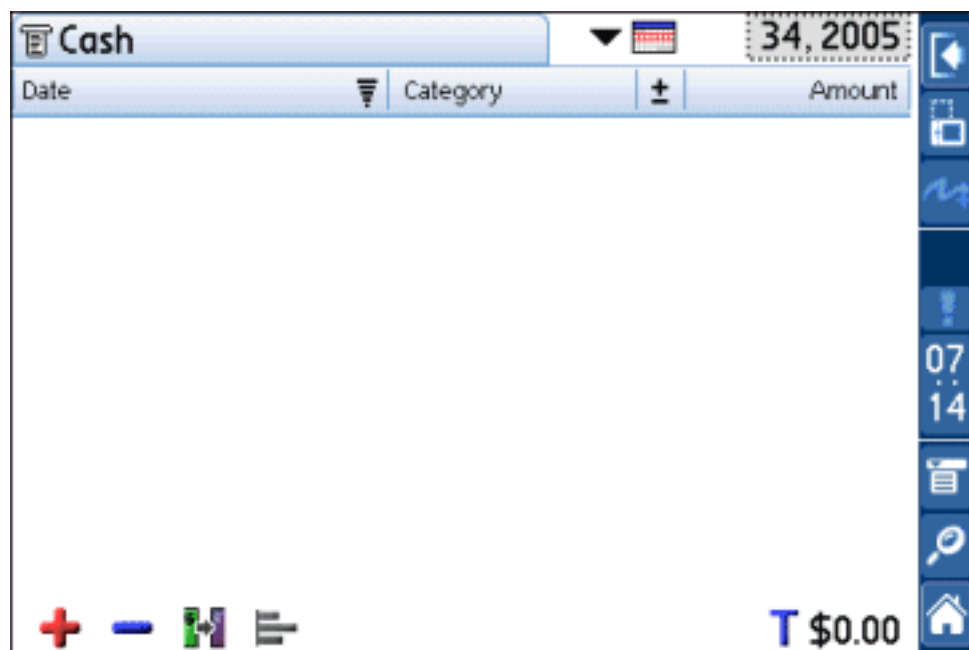
To create an account you need to enter its name and select a currency (also you can check "Mileage" to create mileage account - see Mileage Account). Then push "OK" to create the account.

After the new account is created the program offers you to create default categories in this account. Default categories are: Bonus, Salary (income categories), Auto, Clothing, Dining, Entertainment, Household, Taxi, Travel, Vacation, Education (expense categories), Insurance, Gift (income/expense categories).







Push "Yes" to create default categories or "No" to create categories later manually.

After the new account is created inExpense shows Transaction View, the main window you will work with.



Form header shows current account name ("Cash"). Also on the top of the form you can select date range for records to show (right now it is a week, 34th of 2005). The main part of the form is taken by the transactions list (empty yet).

At the bottom of the form you can see  and  icons you tap to add positive (income) or negative (expense) transactions. Tap on  icon allows you to create a new exchange record (in other words, to transfer money between accounts). And at last,  icon shows the Report View where you can see text reports and charts with summary of your expenses.

In the bottom right corner you can see the sum of all transactions ("Turnover") currently displayed on the screen (\$0.00 for there are no transactions yet).

For the purpose of this tutorial push  to enter your first income transaction.

New Income

Date:

Aug 15, 2005

Category:

Misc

Amount:

\$1000.00


Description:

Initial balance

OK

Cancel

Select date, category and amount for the income and enter an optional description. Push "OK" button to save the new income and return to the Transaction View.

After you return to the Transaction View push  to enter your first expense record.

New Expense

Date:

Aug 15, 2005

Category:

Dining

Amount:

\$10.00


Description:

OK

Cancel

Select date, category and amount for the expense and push "OK" button to save it.

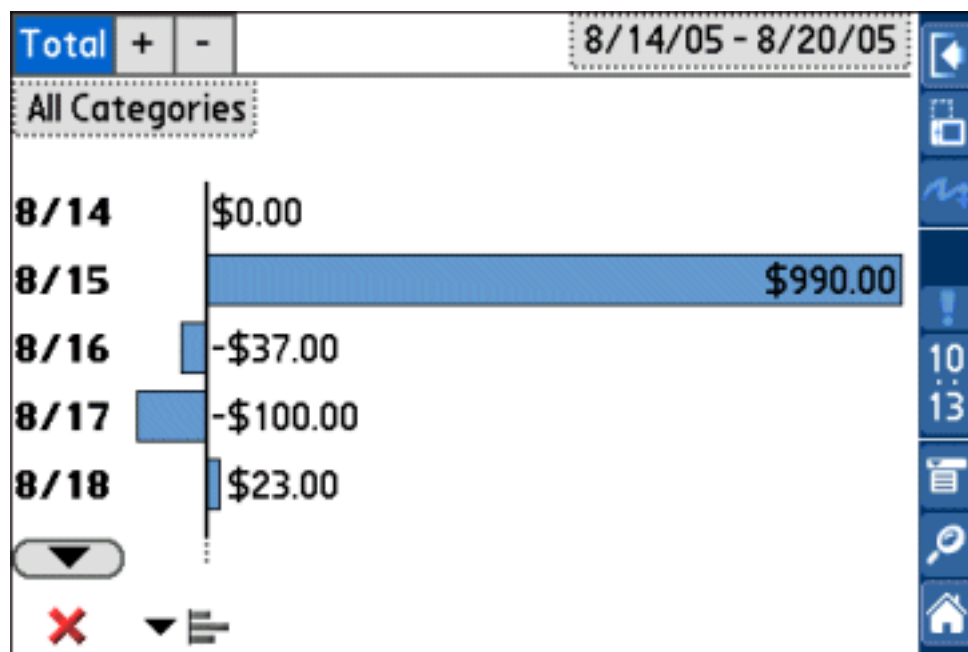
After you return to the Transaction View you should see something like this. If not then try to select different date range (at the top of the form).

Cash		▼ 		34, 2005
Date	Category	±	Amount	
8/15	Misc	+	\$1000.00	
8/15	Dining	-	\$10.00	
			T \$990.00	

Try to enter more income and expense records. If you enter different dates for the new transactions you need to set date range as a week or a month to view them in the Transaction View record list. If you want to edit transaction simply tap on it in the list to call edit dialog. After entering more transaction you may get something like shown on the picture below.





Cash			34, 2005
Date	Category	±	Amount
8/15	Misc	+	\$1000.00
8/15	Dining	-	\$10.00
8/16	Entertainment	-	\$25.00
8/16	Dining	-	\$12.00
8/17	Household	-	\$36.00
8/17	Gift	-	\$50.00
8/17	Dining	-	\$14.00
8/18	Gift	+	\$100.00
8/18	Dining	-	\$11.00
8/18	Clothing	-	\$66.00
			T \$876.00

Now push  icon to try inExpense reporting capabilities.






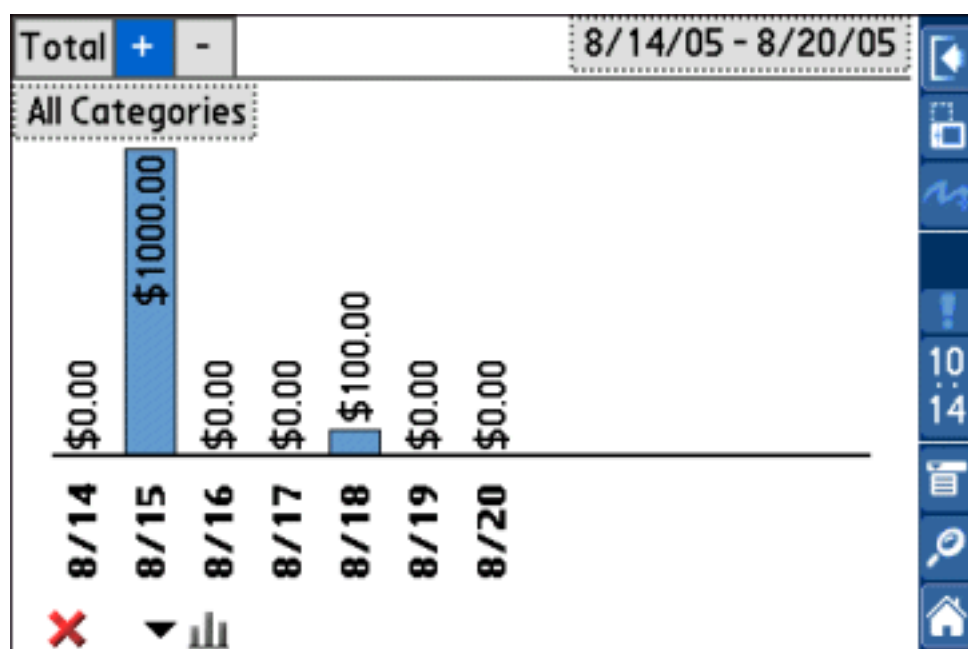
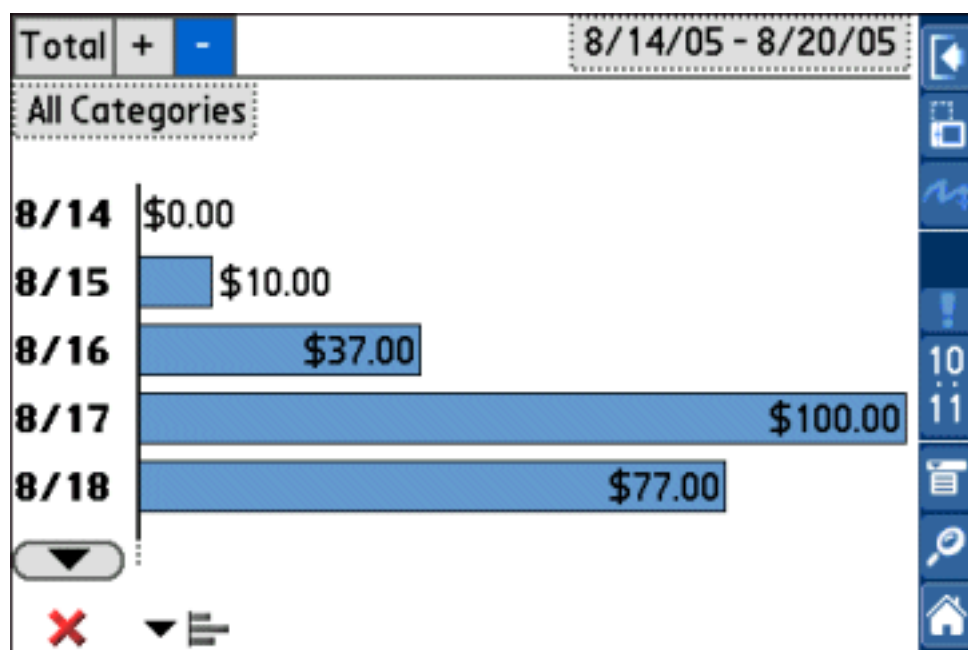
This is a default report mode. Feel free to change report appearance to view information you need.

Pushbuttons in the top left corner ("Total", "+" and "-") allow you to see reporting on all transactions or only on positive or negative. Selector with the date range in the top right corner and with category names (now showing "All Categories") show you the current filter settings and on tap open filter customization dialog.

 icon closes the report and selecting icon from the popup list on the bottom (,  or ) changes the report mode (two chart modes and text mode correspondingly).

Below you can see some examples of what you can get by changing report options.

Day	Amount
8/14	\$0.00
 8/15	\$990.00
 8/16	-\$37.00
Dining	-\$12.00
Entertainment	-\$25.00
 8/17	-\$100.00
Dining	-\$14.00
Household	-\$36.00
Gift	-\$50.00
Total: \$876.00	



Total	+	-	34, 2005 - 34, 2005	
All Categories				
Week	Amount			
34, 05	\$876.00			
Clothing	-\$66.00			
Dining	-\$47.00			
Entertainment	-\$25.00			
Gift	\$50.00			
Household	-\$36.00			
Misc	\$1000.00			
Total: \$876.00				


For more information about working with inExpense see inExpense Reference.

inExpense Reference

Transaction View

Cash		Aug 2005	
Date	Category	±	Amount
8/15	Misc	+	\$1000.00
8/15	Dining	-	\$10.00
8/16	Entertainment	-	\$25.00
8/16	Dining	-	\$12.00
8/17	Household	-	\$36.00
8/17	Gift	-	\$50.00
8/17	Dining	-	\$14.00
8/18	Gift	+	\$100.00
8/18	Dining	-	\$11.00
8/18	Clothing	-	\$66.00
			T \$876.00

The first thing you see after launching inExpense is Transaction View. Here you can see all incomes and expenses for a given period of time.

On the top left corner of the screen you can see  icon and the current account name. To switch account tap on account name and select one of the last five accounts from popup list or "..." to select another account from Accounts form. Also you can use Accounts menu item of menu Tools to switch account.

Push  to open the menu.

You can customize the reaction to your taps of elements on the view header in the options dialog accessible via menu "Options"->"General..."

On the bottom right corner of the screen you can see the current transactions turnover (amounts sum of all transactions currently displayed). You can tap on it and select to display the account balance to current date (amounts sum of all transactions of the account).

Transaction List




The largest part of Transaction View is transaction list — the list of incomes and expenses for a given date range. This range can be set using the controls above record list.

Records in the list can be sorted by a column: *Date*, *Category*, *Sign* (as a secondary sorting) or *Amount*. Tap once on the column header to change sorting order (ascending or descending), or to change sorting column. In any sorting order selection the records are afterwards sorted by date and only then by transaction type (or sign).

You can customize the font size of every column and transaction list header in the options dialog accessible via menu "Options"->"Fonts...".

You can view, edit or delete record by tapping on a record. For details see Editing Record.

Date Range Selection


Date range is displayed on the top right corner of the main form. It can be a single day , a week  or a month .

To set a different period you have to tap on the control on the top middle of the form and select a date range length in the popup list. Then tap on the control, where current date range is displayed, to set a new one.

Functional Buttons

There are four functional buttons on Transaction View: , ,  and .

Tap on  icon to add an income. For details see Adding Transaction.

Tap on  icon to add an expense. For details see Adding Record.

Tap on  icon to transfer money to another account. Fill exchange form as follows:


- *Date* - date of transaction;
- *To account* - account you transfer money to;
- *Amount* - amount of money you transfer;
- *Rate* - exchange rate;

- *To amount* - amount of money you will get in the recipient account.

Changing one of the last three values recalculates the two others.



The 'Exchange' dialog box has a blue title bar with the word 'Exchange' and an information icon. It contains four labeled text fields: 'Date:' with the value 'Aug 16, 2005', 'To Account:' with the value 'Visa', 'Amount:' with the value '\$100.00', and 'Rate:' with the value '1.000'. Below these fields is another 'To Amount:' field with the value '\$100.00'. At the bottom are 'OK' and 'Cancel' buttons.

Tap on  icon to open Report View. View of this button can vary depending on the last used report mode. For details see Report View.

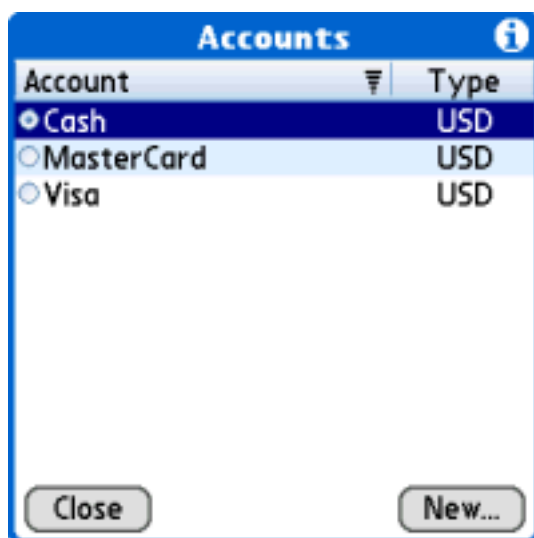
Menu

Tools

Tools menu allows you to operate with accounts, categories and currencies.

- **Accounts**

Use it to open *Accounts* dialog form.



The 'Accounts' dialog box has a blue title bar with the word 'Accounts' and an information icon. It contains a table with two columns: 'Account' and 'Type'. The 'Account' column has a dropdown arrow. The table lists three accounts: 'Cash' (selected with a radio button), 'MasterCard', and 'Visa', all with 'USD' as the type. At the bottom are 'Close' and 'New...' buttons.

Account	Type
<input checked="" type="radio"/> Cash	USD
<input type="radio"/> MasterCard	USD
<input type="radio"/> Visa	USD

There you can make an account active, create a new account, edit or delete accounts. Active account cannot be deleted.

Accounts can be sorted by *Account* or *Type*. Tap once on the column header to change sorting order (ascending or descending), or to change sorting column.

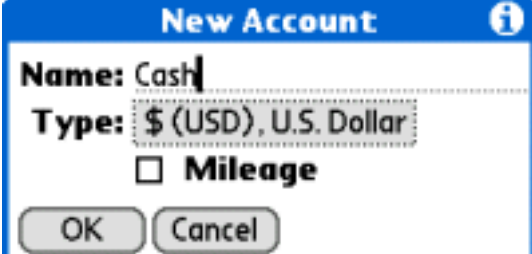
Active account is marked with checked radiobutton near it. To activate an account you should check the appropriate radiobutton by tapping on it.

To create a new account you should tap on *New* button and input the account's data in opened form.

Write name of the account in *Name* field.

Tap on *Type* control to select account currency. For details see Currencies.

Also you can check *Mileage* control to create mileage account. For details see Mileage Account.



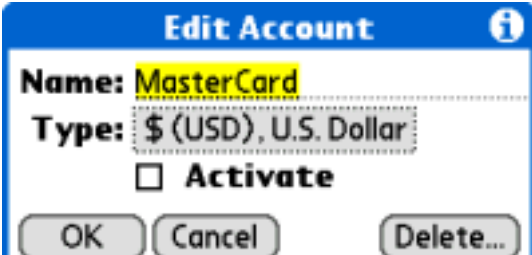
The 'New Account' dialog form has a blue header with the title 'New Account' and an information icon. It contains two text input fields: 'Name:' with the value 'Cash' and 'Type:' with the value '\$ (USD), U.S. Dollar'. Below the 'Type' field is a checkbox labeled 'Mileage' which is currently unchecked. At the bottom are two buttons: 'OK' and 'Cancel'.

To edit or delete account you have to tap on it and change the account's data in opened form.

Edit name of the account in *Name* field.

Tap on *Type* control to change account currency. For details see Currencies.

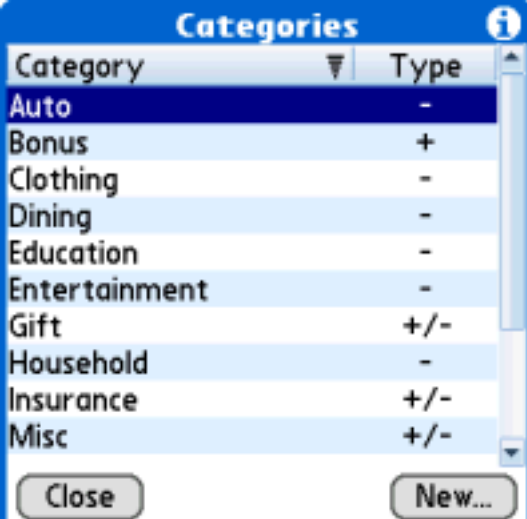
Tap on *Delete* button to delete account.



The 'Edit Account' dialog form has a blue header with the title 'Edit Account' and an information icon. It contains two text input fields: 'Name:' with the value 'MasterCard' (highlighted in yellow) and 'Type:' with the value '\$ (USD), U.S. Dollar'. Below the 'Type' field is a checkbox labeled 'Activate' which is currently unchecked. At the bottom are three buttons: 'OK', 'Cancel', and 'Delete...'.

- **Categories**

Use it to open *Categories* dialog form.



The 'Categories' dialog form has a blue header with the title 'Categories' and an information icon. It displays a list of categories with their corresponding types. The list is as follows:

Category	Type
Auto	-
Bonus	+
Clothing	-
Dining	-
Education	-
Entertainment	-
Gift	+/-
Household	-
Insurance	+/-
Misc	+/-

At the bottom of the dialog are two buttons: 'Close' and 'New...'.

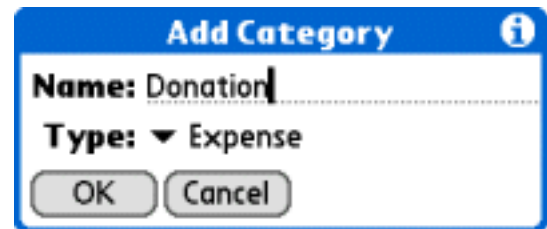
There you can create a new category, edit or delete categories.

Categories can be sorted by *Category* or *Type*. Tap once on the column header to change sorting order (ascending or descending), or to change sorting column.

To create a new category you should tap on *New* button and input the category's data in opened form.

Write name of the category in *Name* field.

Tap on *Type* control to select category type: *Income*, *Expense* or *Income\Expense*. If you select *Income* or *Expense* you will be able to use this category only on positive (income) or negative (expense) transactions correspondingly. Use *Income\Expense* category type to use this category with any transaction type.



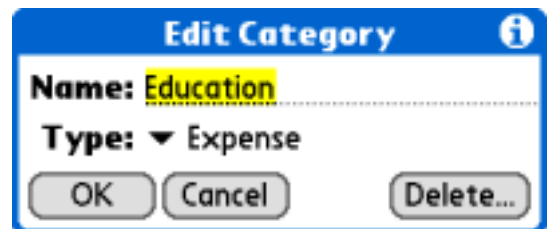
The 'Add Category' dialog form has a blue header with the title 'Add Category' and an information icon. It contains two text input fields: 'Name:' with the value 'Donation' and 'Type:' with a dropdown menu showing 'Expense'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

To edit or delete category you have to tap on it and change the data of the category in opened form.

Edit name of the category in *Name* field.

Tap on *Type* control to change category type. For details see previous paragraph.

Tap on *Delete* button to delete category.



The 'Edit Category' dialog form has a blue header with the title 'Edit Category' and an information icon. It contains two text input fields: 'Name:' with the value 'Education' (highlighted in yellow) and 'Type:' with a dropdown menu showing 'Expense'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Delete...'.

- **Currencies**

Use it to open *Currencies* dialog form.



The 'Currencies' dialog form has a blue header with the title 'Currencies' and an information icon. It contains a table with two columns: 'Currency' and 'Abbr'. The table lists three currencies: 'U.S. Dollar' (USD), 'G.B. Pound' (GBP), and 'Euro' (EUR). At the bottom, there are two buttons: 'Close' and 'New...'.

Currency	Abbr
U.S. Dollar	USD
G.B. Pound	GBP
Euro	EUR

There you can create a new currency, edit or delete currencies.

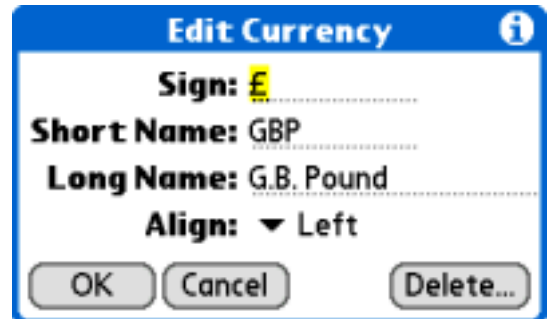
Currencies can be sorted by *Currency* (name) or *Abbr* (short name). Tap once on the column header to change sorting order (ascending or descending), or to change sorting column.

To create a new currency you should tap on *New* button and input the currency's data in opened form: *Sign* (that will be displayed with all sums), *Short Name*, *Long Name* and *Align* (where to put currency sign: to the left or to the right of the sum).

A screenshot of the 'Add Currency' dialog box. It has a blue header with the title 'Add Currency' and an information icon. The form contains four fields: 'Sign' with the value 'Can\$', 'Short Name' with 'CAD', 'Long Name' with 'Canadian Dollar', and 'Align' with a dropdown menu set to 'Left'. At the bottom are 'OK' and 'Cancel' buttons.

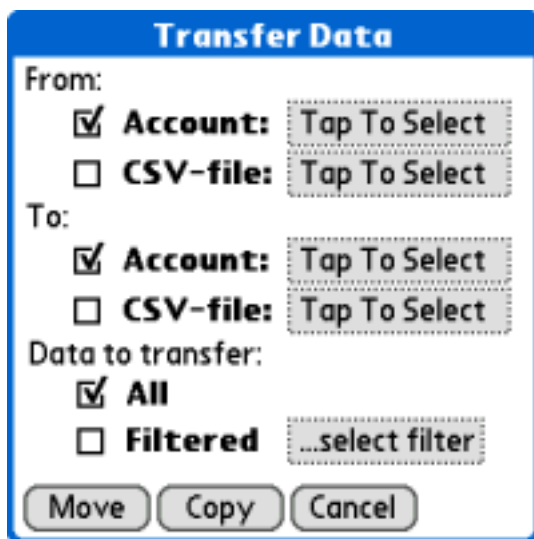
To edit or delete currency you have to tap on it and change the currency's data in opened form: *Sign* (that will be displayed with all sums), *Short Name*, *Long Name* and *Align* (where to put currency sign: to the left or to the right of the sum).

Tap on *Delete* button to delete currency.

A screenshot of the 'Edit Currency' dialog box. It has a blue header with the title 'Edit Currency' and an information icon. The form contains four fields: 'Sign' with the value '£', 'Short Name' with 'GBP', 'Long Name' with 'G.B. Pound', and 'Align' with a dropdown menu set to 'Left'. At the bottom are 'OK', 'Cancel', and 'Delete...' buttons.

- **Export/Import**

Use it to open *Transfer Data* dialog form.

A screenshot of the 'Transfer Data' dialog box. It has a blue header with the title 'Transfer Data'. The form is divided into 'From:' and 'To:' sections. Each section has two options: 'Account:' (checked) and 'CSV-file:' (unchecked), both with 'Tap To Select' buttons. Below these is the 'Data to transfer:' section with 'All' (checked) and 'Filtered' (unchecked) options, and a '...select filter' button. At the bottom are 'Move', 'Copy', and 'Cancel' buttons.

There you can transfer data between accounts and export it to or import from CSV file on your handhelds expansion card.

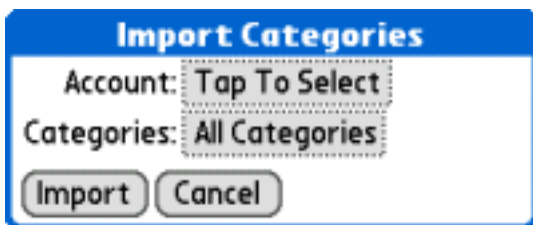
Check source and destination of the transfer using *From* and *To* control groups correspondingly. Tap on relative *Tap To Select* control to select account or CSV file.

Check *All* in *Data Transfer* control group, if you want to transfer all data. To transfer records of selected categories, check *Filtered* and tap on *...select filter* control to select categories for records filter.

Tap on *Move* button to move the records, or *Copy* button to copy them.

- **Import Categories**

Use it to open *Import Categories* dialog form.



There you can import categories from another account to current one.

Tap on *Tap To Select* control near *Account* label to select importer account. Tap on other control (near *Categories* label) and select categories to import.

Tap on *Import* button to perform import or *Cancel* to cancel this action.

After tapping on *Import* button you will be asked whether to delete old categories in the account you import to.

- **Purge Records**

Use it to open *Purge Records* dialog form.



Purge Records

Purge By: ▼ day

Start Date: 8/15/05

End Date: 8/15/05

<input type="checkbox"/> Auto	<input type="checkbox"/> Household
<input type="checkbox"/> Bonus	<input type="checkbox"/> Insurance
<input type="checkbox"/> Clothing	<input type="checkbox"/> Misc
<input type="checkbox"/> Dining	<input type="checkbox"/> Salary
<input type="checkbox"/> Education	<input type="checkbox"/> Tax
<input type="checkbox"/> Entertainment	<input type="checkbox"/> Travel
<input type="checkbox"/> Gift	<input type="checkbox"/> Vacation

Purge Cancel

☐ ☑

There you can purge old records to save some handhelds memory. Purging means grouping several records by categories into one per each category with summary amount. Thus you save the memory and your account balance will remain correct.

Select date range from *Purge By* popup list.

Set *Start Date* and *End Date* using popup calendar.

Check the categories of purging records. Tap on ☑☑ icon to check all categories or ☐☐ icon to clear all categories.

Tap on *Purge* button to purge the records according to your settings.

• Backup/Restore Data

Use it to open *Backup/Restore Data* dialog form.



Backup/Restore Data

WARNING

inExpense built-in backup feature allows you to save a copy of all data on the memory card. Please be extremely cautious when restoring data from the backup. When you launch "Restore" function all current data will be lost!

Last backup: -no backup-

Backup Restore Close

There you can backup all your data on expansion card or restore it. Data saved includes all accounts, categories and currencies.

First, read the warning to be more accurate with these features.

Below the warning you can see the time of the last backup.

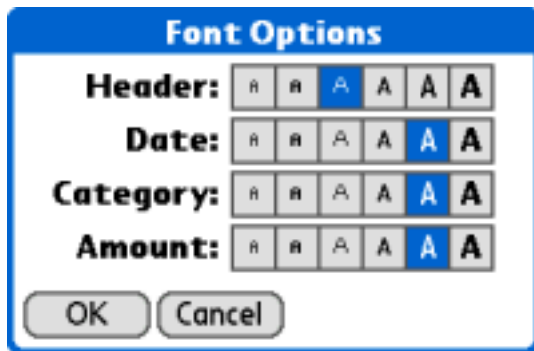
Tap on *Backup* button to backup your data or *Restore* button to restore it.

Options

Options menu provides you general, report and password options.

- **Fonts**

Use it to open *Font Options* dialog form.



There you can set fonts for column headers (*Header*), dates (*Date*), categories (*Category*) and amounts (*Date*), used in Transaction View list.

- **General**

Use it to open *General Options* dialog form.



There you can set default account settings:

- Autostart


Check it to open default account on program start.

- Name

Tap on the control and select default account. Selected account will be opened automatically each time you starting the program if "Autostart" checkbox is enabled. Otherwise the last used account will be loaded.

There you can set header tap actions, which will be applied on pushing "OK" button:

- On Icon

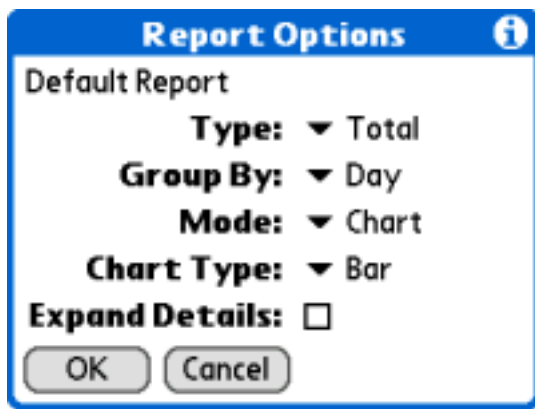
Select the action that tapping on header icon  (on the top left corner of the Transaction View) leads to. It can be account list opening (*Account List*), menu opening (*Menu*) or no action (*None*).

- On Text

Select the action that tapping on account name (on the top left corner of the Transaction View) leads to. It can be accounts list opening (*Accounts List*), menu opening (*Menu*) or no action (*None*).

- **Report**

Use it to open *Report Options* dialog form.



There you can set default report settings, which will be applied on the next program launch:

- Type

Defines default report type. Select *Total* to include all transactions in the report, select *Income* to include only incomes or *Expense* to include only expenses.

- Group By

Defines default date range of report item. Select *Day*, *Week* or *Month*.

- Mode

Defines default report mode. Select *Chart* to set Chart mode as default or *Text* to set Text mode as default.

- Chart Type

Defines default chart type of the Chart mode reports. Select *Bar* or *Column*.

- Expand Details

Check it to expand details by default in the Text mode reports.

- **Password**

Use it to open *Password Options* dialog form.



There you can set the password, you will be asked for on program start.

Enter a numeric password in *Password* field. If you clear this field password will be disabled.

Set session time — maximum time after exiting the program when the password will not be asked — from the *Session Time* popup list.

Reports

Reports menu provides you access to various reports.

- **Chart - Bar**

Use it to open Report View in bar Chart mode.

- **Chart - Column**

Use it to open Report View in column Chart mode.

- **Text**



Use it to open Report View in Text mode.

- **Accounts**



Use it to open *Accounts Report* form.

Accounts Report	
Account	Balance
<input type="checkbox"/> Cash	\$853.00
--Start Date: 8/15/05	
--End Date: 8/18/05	
--Total Transactions: 11	
<input checked="" type="checkbox"/> Maestro Pounds	£710.42
MasterCard	\$0.00
<input checked="" type="checkbox"/> Visa	\$100.00
<input checked="" type="checkbox"/> Visa Euro	-53.70€
--Start Date: 8/16/05	
--End Date: 8/16/05	

There you can see all your accounts with their current balance.

You can view account details: Start Date (date of the first transaction), End Date (date of the last transaction) and Total Transactions (total number of transactions). Tap on an account name to view or hide this additional data. Also you can use special icons ( or ) to view or hide all additional data.

Adding Transaction

To add an income or an expense you should tap on  or  button correspondingly in the Transaction View form. After this *New Income* or *New Expense* dialog opens. You can enter transaction information in this dialog.

New Expense

Date: Aug 16, 2005

Category: Misc

Amount: \$100.00

Description: Friday party

OK

Cancel

Tap on *Date* control to choose a date from the popup calendar. Current date is set by default.

Tap on *Category* control to set record category. After this *Categories* window opens where you can select a category from category list. Category list will show only categories of income (for income transactions) or expense (for expense transactions) type.

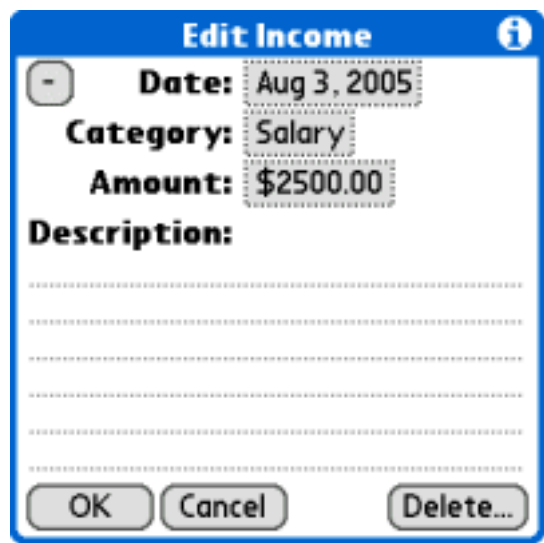
Tap on *Amount* control to set record amount. After this *Calculator* window opens where you can compute amount or simply enter it. Then tap on *OK* button.

Also you can enter an optional record description below *Description* label.

Tap on *OK* button to save the record or *Cancel* to abort creating new transaction.

Editing Transaction

To edit an income or an expense you should tap on it in Transaction View list. After this *Edit Income* or *Edit Expense* form opens. You can edit transaction information in this form.



You can change income to expense (or expense to income) by tapping on - (+) button.

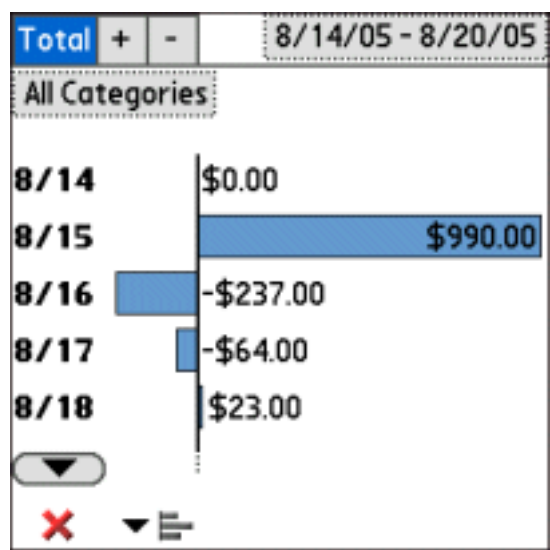
You can change record date, category or amount by tapping on *Date*, *Category* or *Amount* control.




Also you can edit record description below *Description* label.

To delete the record tap on *Delete* button and confirm delete confirmation.

Tap on *OK* button to save the record changes or *Cancel* button to discard them.




Report View



Report View allows you to view record reports of some date range grouped by day, week or month. To open it you can tap on  (or , or , it depends on the last used report mode) icon in Transaction View or by selecting items from menu "Reports".

Report is a grouped summary of incomes and expenses of the specific date range. You can set it to view only summary incomes or summary expenses using the control in the top left corner of the screen: tap "+" to view only incomes, tap "-" to view only expenses or tap *Total* to view incomes and expenses.

The report date range control is located in the top right corner of the screen. Also there is the report categories control below the border line at the top of the screen. Tap on one of these controls to open Filter dialog form where you can customize current report filter.

You can view reports in two modes: Text mode and Chart mode. Chart mode can be bar chart or column chart. Select icon from the popup list on the bottom ( ,  or ) to switch between the modes.

Default report mode can be set in Report Options preferences form.

Text Mode

Total	+	-	8/14/05 - 8/20/05
All Categories			
Day		Amount	
8/14		\$0.00	
8/15		\$990.00	
8/16		-\$237.00	
Dining		-\$12.00	
Entertainment		-\$25.00	
Misc		-\$200.00	
8/17		-\$64.00	
Dining		-\$14.00	
Gift		-\$50.00	
		Total: \$712.00	

Text mode report is the record summary list grouped by date and category. It can be set as a default report using Report Options preferences form.

You can view record details - amounts grouped by category. Tap on a record to view or hide this additional data.

On the bottom right corner of the screen you can see total sum of the transaction amounts for a given period of time.



Tap on  icon to return to Transaction View or  icon to select report mode from popup list.

Chart Mode

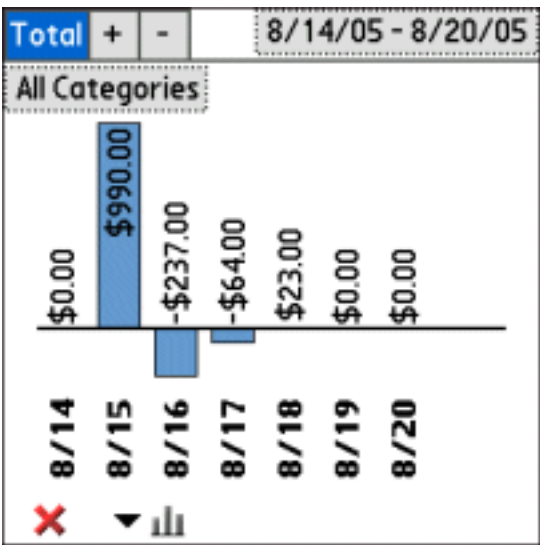
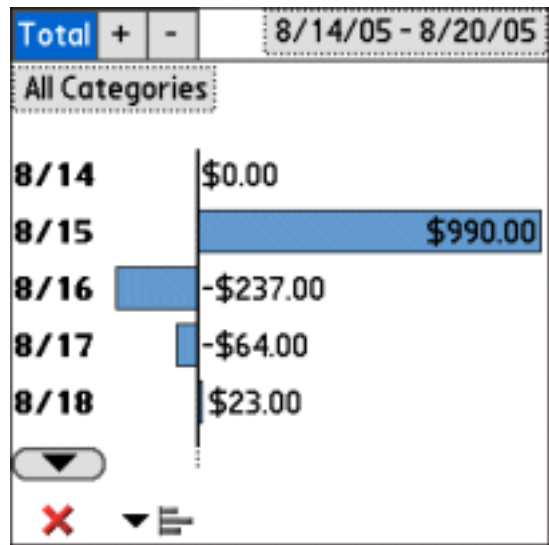


Chart mode report is the chart that represents the records of specific date range grouped by day, week or month. It can be set as a default report using Report Options dialog window.

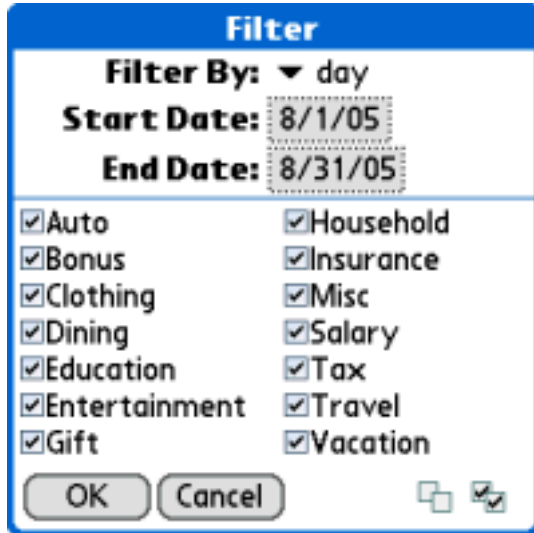
Default chart type can be set in Report Options preferences form.

Use the scrolling buttons to scroll a chart.

Tap on  icon to return to Transaction View or  () icon to select report mode from popup list.

Customizing Filter

Filter can be customized in *Filter* dialog form. To open it tap on one of the filter controls in Report View.





The **Filter** dialog form has a blue header. Below the header, it shows 'Filter By: day' with a dropdown arrow. Underneath are 'Start Date: 8/1/05' and 'End Date: 8/31/05', each with a calendar icon. A list of categories follows, each with a checked checkbox: Auto, Bonus, Clothing, Dining, Education, Entertainment, Gift, Household, Insurance, Misc, Salary, Tax, Travel, and Vacation. At the bottom are 'OK' and 'Cancel' buttons, and two small icons: an unchecked checkbox and a checked checkbox.

Select the grouping factor from *Filter By* popup list.

Set *Start Date* and *End Date* using popup calendar.

Use categories list to check the categories to include to the report.

Tap on  icon to check all categories or  icon to uncheck all categories.

Tap on *OK* button to apply the filter or *Cancel* button to cancel the changes and close the form.

Mileage Account

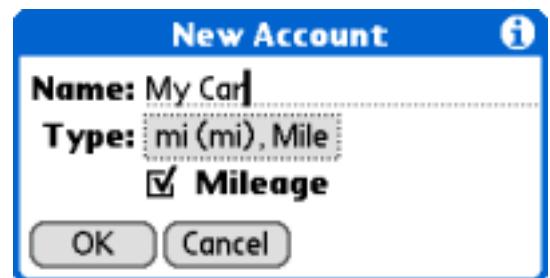
Creating

Mileage account can be created the same way as any other account - from Accounts dialog form.

Check *Mileage* control to create mileage account.

Write name of the account in *Name* field.

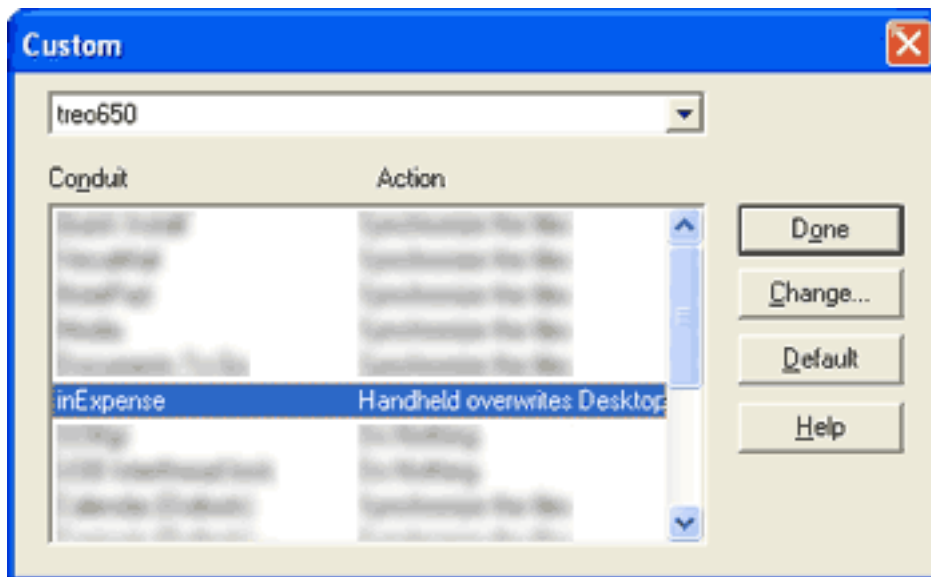
Tap on *Type* control to select preferable unit of length: mile or kilometre.



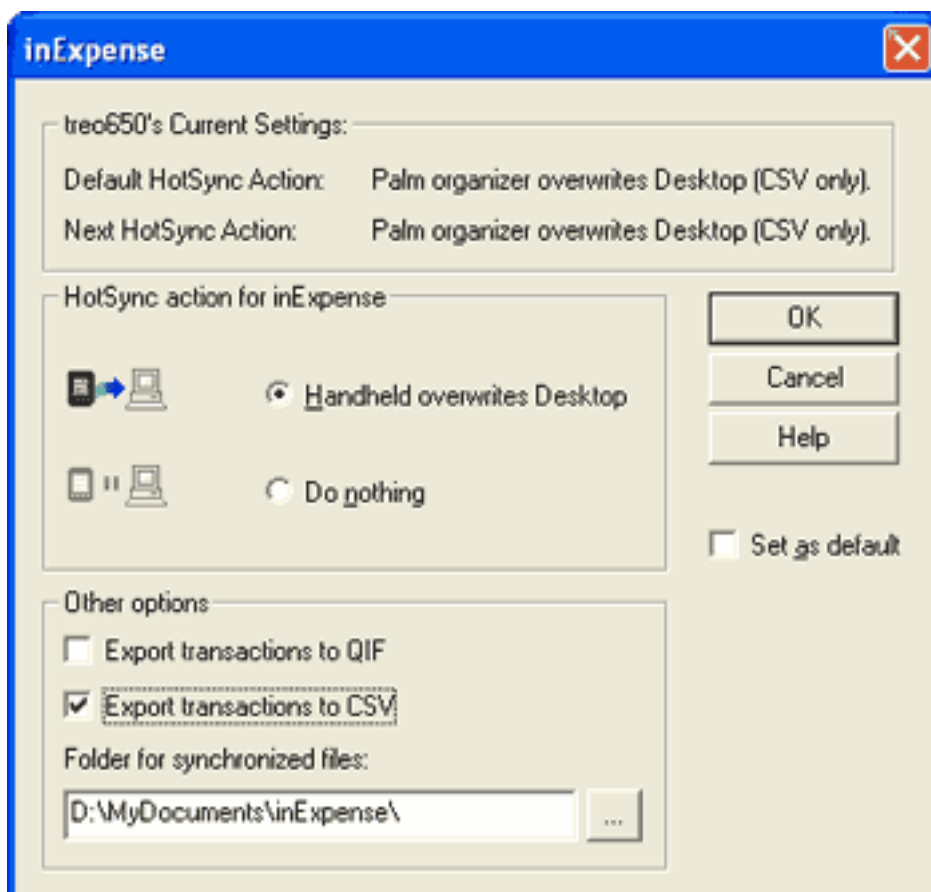
The **New Account** dialog form has a blue header with an information icon. It contains a 'Name:' field with the text 'My Car' and a 'Type:' field with a dropdown menu showing 'mi (mi), Mile'. Below the dropdown is a checked checkbox next to the word 'Mileage'. At the bottom are 'OK' and 'Cancel' buttons.

Managing

Also you can select *Palm Desktop* -> *Palm Desktop* in *Start* -> *Programs* menu. Then in *Palm Desktop* window select *Custom...* from *HotSync* menu.



In *Custom* dialog window select your HotSyncID and also select *inExpense* from *Conduit* list. Then push *Change* button to open *inExpense* dialog window where you can set different synchronization settings. Also you can push *Default* button to set synchronization settings to default.



In *inExpense* dialog window check *Handheld overwrites Desktop* to synchronize your transactions during next synchronization or check *Do nothing* to disable synchronizing.

Specify synchronized file formats using *Export transactions to QIF* and *Export transactions to CSV* checkboxes.

Also you can set a different folder for synchronized files in *Folder for synchronized files* field.