
My Expenses Tutorial

Michael Totschnig <michael@totschnig.org>

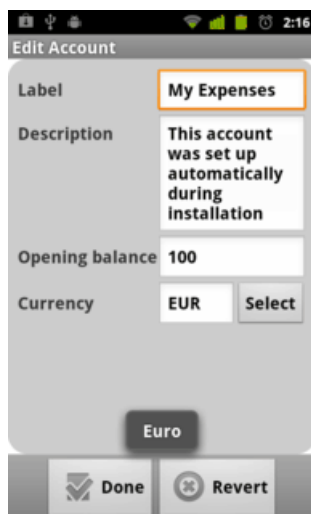
Introduction



My Expenses is designed to keep track of your expenses and incomes, and to export these expenses into a desktop finance tool, like Grisbi or GnuCash. It supports multiple accounts and a two-level hierarchy of categories.

Its main screen displays the list of transactions for the current account. The button bar displayed at the bottom of the screen gives easy access to all functionalities. Each button executes a default action on short clicks and most open up a menu with further actions on long clicks. Alternatively, you can configure My Expenses in Use standard Android menu to use a command interface based on the Android standard menu.

Accounts



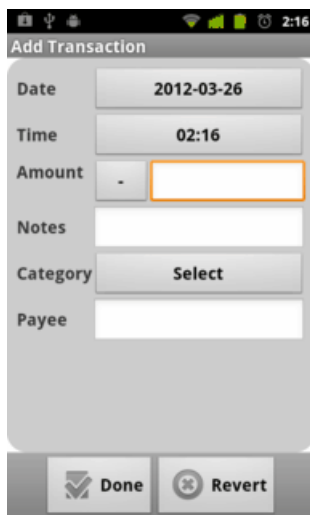
When you launch My Expenses for the first time, there is one default account defined and you can immediately start adding transactions. If you want to edit the default account, use Settings → Current account, whereas Accounts → New ... allows to create a new account.

Enter a label, a description, the opening balance¹ and a currency for the account. The currency must be entered according to its three-letter code in ISO 4217, but can be chosen easily from a list by clicking on the Select button.

When you confirm that you are done, you get back to the transaction list. If you have created a new account, it is automatically set to be the current account. You can easily switch between accounts through the Accounts button. A short click switches to the last active account, a long click gives access to a menu of all accounts.

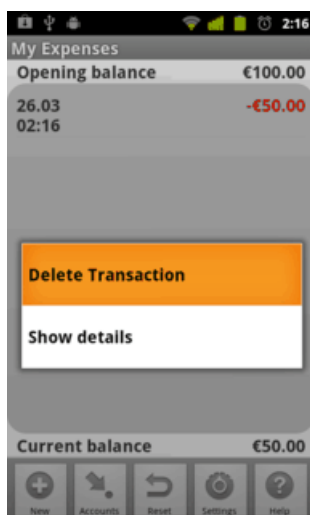
For managing the complete account list, please refer to Manage accounts.

Transactions



A short click on New brings up the activity for creating a transaction.

Adjust date and time, click on the - Button to toggle between expense and income, enter amount¹ and notes. The payee (or payer) field remembers the values you enter and will suggest them in the future². Clicking on the Select button, brings up the Select category activity. We will explain below, how to manage categories.



Back at the transaction list, you can edit individual entries through a short click, the context menu allows deleting a transaction, or display full details (payee, notes) about it.

Transfer

New → Transfer allows you to transfer money between accounts. This command is enabled only if you have more than one account with the same currency as the current one.

¹ The input format for currency amounts can be configured through the Decimal separator for input of currency amounts setting.

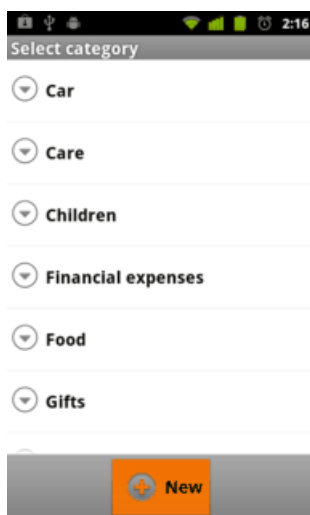
² You can also import a list of parties for autocompleting the payee field from your Grisbi file as explained in Import from Grisbi. If you want to delete entries from this list refer to Manage parties.

Categories

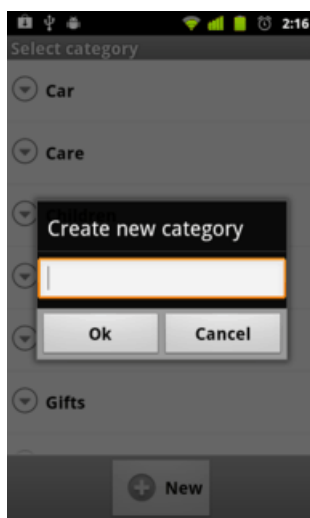


At the beginning, no categories are defined. You have two options for adding them.

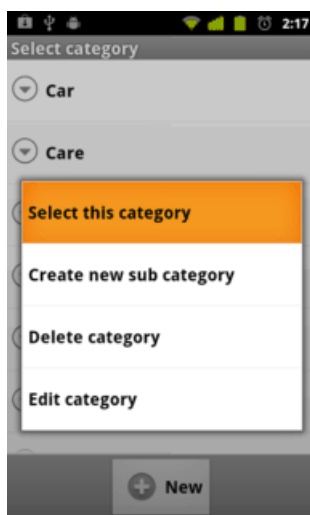
Either you click on the button Import categories which allows to select between different sources, as explained in [Import from Grisbi](#). This button is visible, only as long the categories list is still empty, later you can always access the import functionality from the Settings activity.



You now have a set of categories with subcategories you can associate with your transactions. By default, the primary sort criteria in the category list is the number of times you use a category (the secondary criteria is alphabetical order). This gives you quick access to the categories you use most often. If you prefer to have the categories sorted in plain alphabetical order, you can configure Sort order for categories.



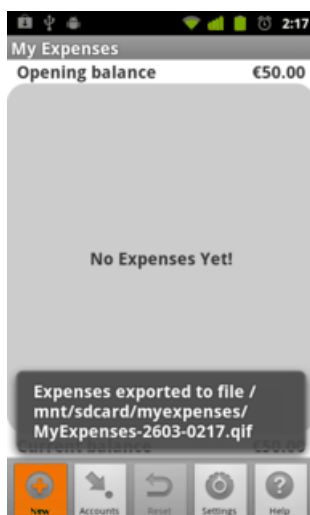
The second option is to add your own categories. Create new main category brings up a dialog for providing a new category label.



Clicking on a main category, opens up its subcategories. You select a subcategory for mapping to the current transaction by simply clicking on it. In order to map a main category, you have to call its context menu.

From here you can also add new subcategories, delete a category or edit it. Subcategories have also context menus for deleting and editing.

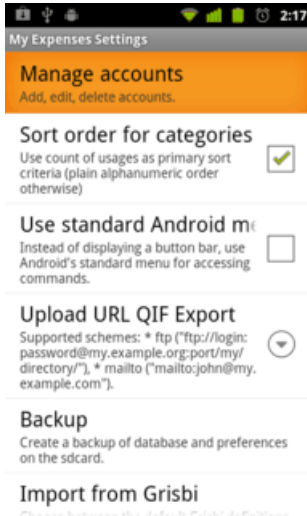
Export transactions



Finally, the raison d'être of My Expenses is its support for export into QIF format. Call this function through the Reset button from the transaction list. This will create a file on your sdcard with all transactions for the current account, delete them from the database, and adjust the opening balance to the last current balance. My Expenses can share the file immediately after the export, either upload it to an FTP server or send it by email. The Upload URL QIF Export setting allows to configure the URL. Transfer operations will also be deleted from the account, but still be visible in the other account they refer to.

Voilà. You can now connect your phone to your computer, open Grisbi (or GnuCash), and use its import functionality.

Settings



A short click on the Settings button opens the preferences screen, from where you can configure some properties of My Expenses, and also have access to the account management, and to the backup functionality. A long click opens up a menu with shortcuts to the configuration of the current account (Current account) and to the backup (Backup).

Manage accounts

Here you see the complete account list. Clicking on an item, opens up the configuration form (explained in [Accounts](#)). A long click on the account brings up the context menu, from where you can delete the account, unless it is the current account that cannot be deleted.

Sort order for categories

By default, categories are sorted primarily by how often you associate them with your transactions. Uncheck this option if you want your categories being sorted in alphabetical order instead.

Upload URL QIF Export

If you enter an URL to a directory on an FTP server, you have write access to (e.g. "ftp://login:password@my.example.org:port/my/directory/"), My Expenses will try to upload your QIF file there, each time you export your transactions. If you enter an Email URL (e.g. "mailto:john@my.example.com"), it will launch your email application, creating a new message with the file attached to it.

Backup and restore

Backup creates a backup of database and preferences in the `myexpenses` folder on the sdcard. The database is stored in a file named `BACKUP`, the preferences in a file named `BACKUP_PREF`. Both are automatically restored when you reinstall My Expenses. Thus you can retrieve all your application data on a different device by copying these two files into the same location there, before installing My Expenses.

Import from Grisbi



This entry allows to set up categories from files included from Grisbi in English, German or French. If with Grisbi you have already defined your own categories, you can also provide your Grisbi file, which is in XML. If you want, you can edit the file with an editor and remove any information other than the `Category` and `Sub_category` elements³. Store this file as in a folder `myexpenses` in the root of your `sdcard`. Since version 1.4.9, you can also import the parties (payers and payees) stored in this file (element `Party`). When you choose your custom file as import source, you can decide to import both parties and categories, or only categories. Partners will be used for the autocomplete function of the payer/payee field in the transaction form.

Use standard Android menu

If this option is checked, Android's standard menu will be used in the transaction list for accessing commands instead of displaying a button bar. You will be offered to activate the menu based interface when clicking on the hardware menu button.

Manage parties

This screen lists the parties used for the autocompletion of the Payer/Payee field. You can remove entries from this list, by checking the checkbox on their right side, and then clicking on the Delete button.

Decimal separator for input of currency amounts⁴

By default, currency amounts for transactions (or the opening balance of an account) use the decimal separator of your locale (comma in most European countries, point in most English speaking countries), here you can explicitly configure it. Alternatively you have the option to input minor units (e.g. \$ cents, €cent, or £ pence) as integers (Minor units as integers).

³ My Expenses also supports the Grisbi file format 0.5.0, where the elements are named `Categorie` and `Sous_categorie` (Tiers for parties).

⁴ Since version 1.4.10.