

You can abbreviate every command and option!

the command:

```
budget detail category Groceries sortby M
```

is equivalent to:

```
budget det cat Groceries sor M
```

is equivalent to:

```
budget d c Groceries s M
```

You can have a summary of your favorite categories

1. write your categories in a CSV file

- one category per line
- no quotes

```
Groceries  
Business Expenses  
Credit Card Payments
```

2. use the `categories` options:

```
budget summary categories MyFavorite.csv
```

You can show the detail of any transaction file

use the `transactions` options:

```
budget detail transactions Download202003.csv
```

You can select data for a given period of time

use the `period` option followed by two dates

- dates should be in the format MM/DD/YYYY
- in which order doesn't matter

```
budget detail period 01/01/2020 01/31/2020
```

```
budget summary p 10/17/2020 01/23/2020
```

You can select data for a given month or year  
use `month` then the year and month

```
budget summary month 2020 03
```

```
budget detail mo 2020 12
```

use `year` then the year

```
budget summary year 2020
```

```
budget detail y 2020
```

You can sort transactions with several criteria

use the `sortby` option followed by letters

- **D** for date, **M** for amount, **C** for category
- **N** for name, **A** for account, **O** for note
- uppercase letter means ascending order
- lowercase letter means descending order

```
budget detail sortby CDm
```

You can sort the summary by category or amount

use the `sortby` option followed by letters

- **C** for category
- **M** for amount
- uppercase letter means ascending order
- lowercase letter means descending order

```
budget summary sortby m
```

### The rules for importing transactions:

- files containing transactions that are already imported are rejected
- a transaction is already imported if there is already a transaction with the same date, name, and amount in the main transaction file
- transactions with a status different from *posted* are not imported
- transactions with a status *posted* are imported and this info is replaced with the account name
- transactions where the account name is already set are imported, but their account name is unchanged.

You can import a file and set the account name

```
budget import Download.csv "Checkings"
```

Or you can import a file that *contains* the account name

```
budget import "Checkings202003.csv"
```

You can import a whole directory

```
ls data/Downloads  
BusinessChecking202003.csv  
BusinessSparkVisa202003.csv  
ChasePersonalCredit202003.csv  
JointChecking202003.csv  
JointSaving202003.csv  
PersonalChecking202003.csv  
PersonalSavings202003.csv
```

all the files will be imported  
the account name will depend on each file name.

```
budget import data/Downloads
```

Where is your main transactions files?

Look into the file `.budget_conf` in your home directory

```
cat ~/.budget_conf  
TRANSACTIONS:/Users/you/data/Transactions.csv
```

Or better, use the `help` command.

```
budget help configuration  
TRANSACTIONS:/Users/you/data/Transactions.csv
```

What is the transaction file CSV format?

1. account (in download files: status)
2. unused
3. date (DD/MM/YYYY)
4. notes
5. name
6. category
7. amount