

+ Totally

Welcome to Totally

Getting started»

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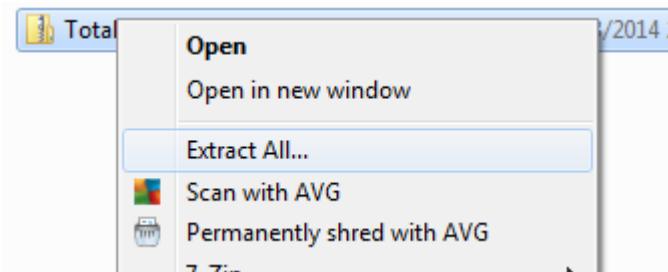
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Welcome to Totally

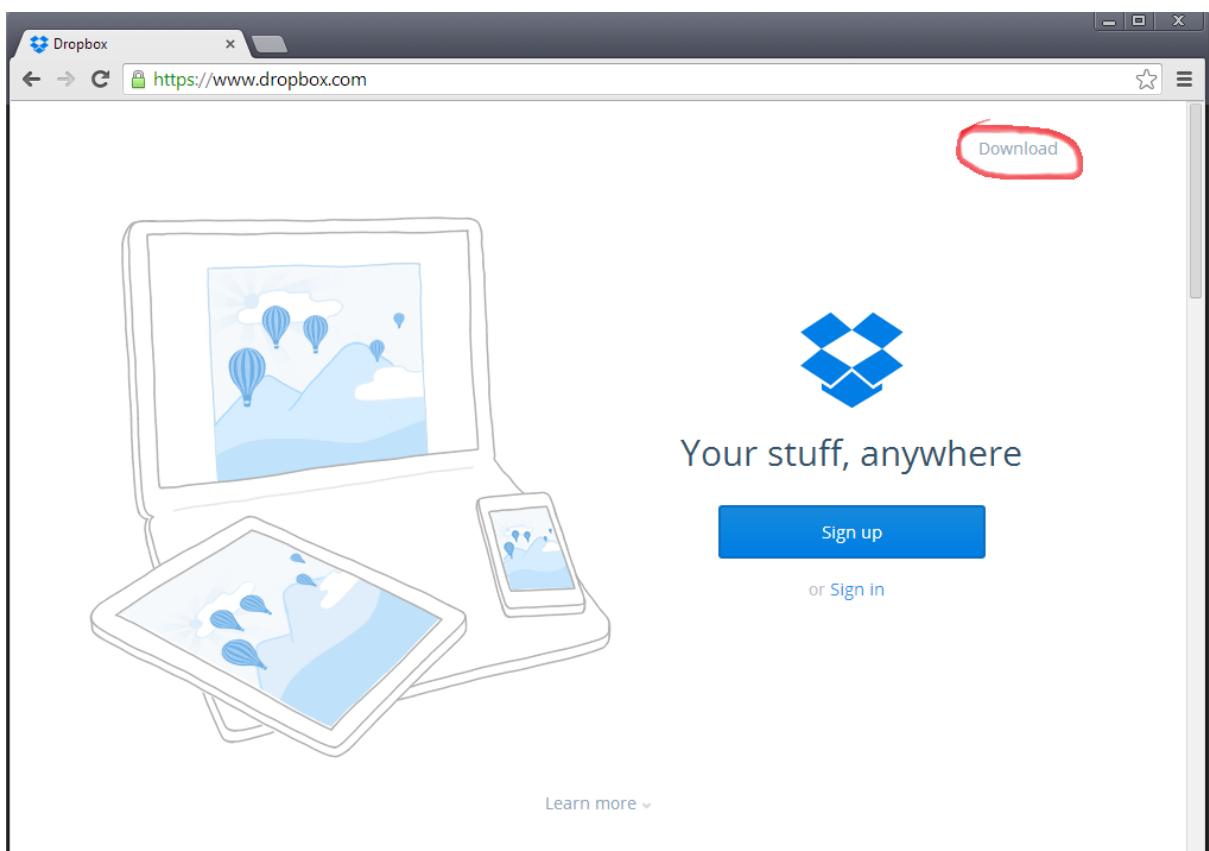
Totally is a program designed to take the uncertainty out of budgeting. By putting in everyday incomes and expenditures, Totally can help you save up money for bigger purchases and unexpected costs. You can add transactions from your mobile when you're out and about, and look in detail at everything else you can do from your computer. Read on to get started using Totally.

How to install

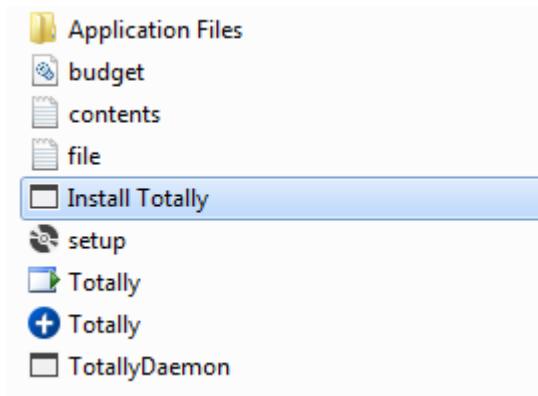
- + Extract the files from the zip archive



- + If your computer does not have Dropbox installed, install this first from www.dropbox.com

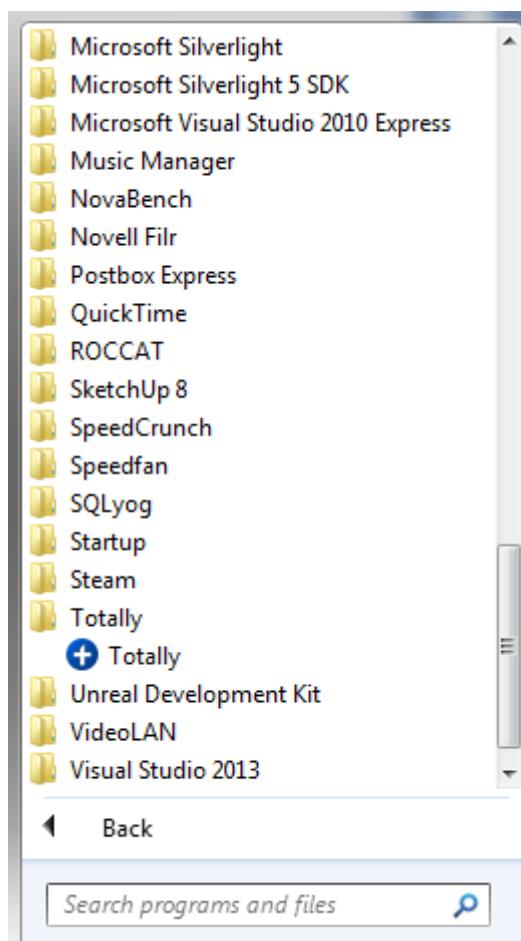


- + Double-click Install Totally



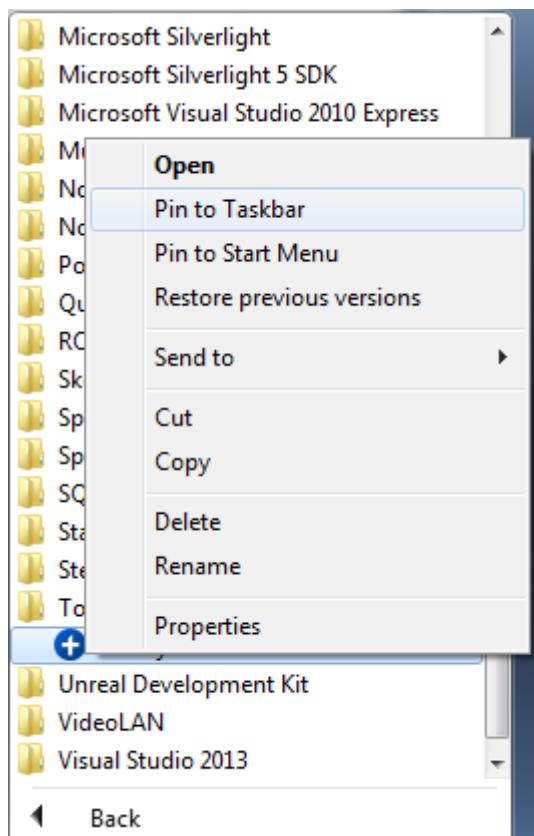
- + Wait for installation to complete. This shouldn't take longer than a few seconds
- + When installation has completed, Totally will start automatically

Totally will now appear in your Start Menu, in the All Programs list.

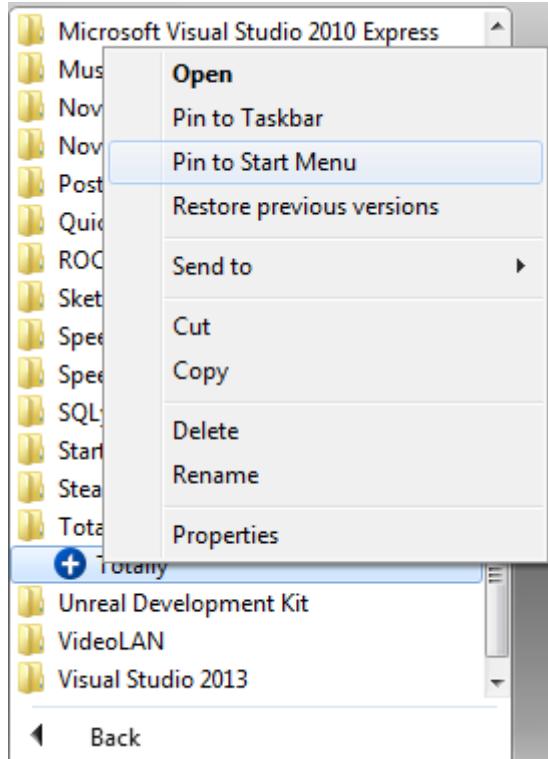


Creating shortcuts

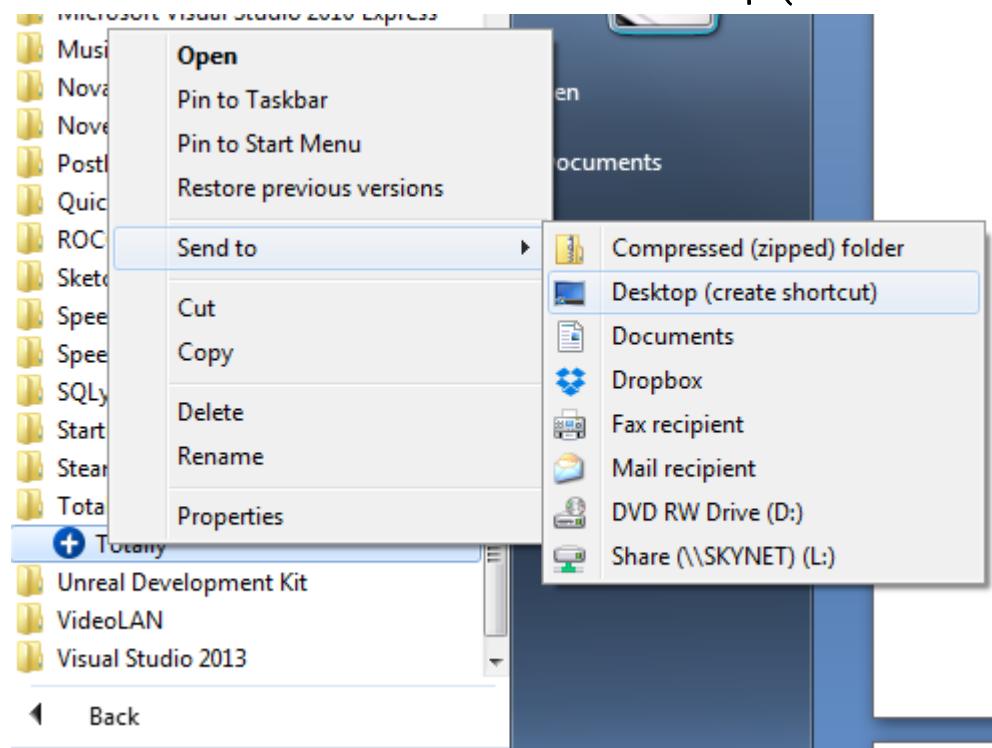
To pin **Totally** to the taskbar, right-click **Totally** in the Start Menu and select **Pin to Taskbar**. To unpin, right-click **Totally's** taskbar icon and select **Unpin this program**.



To pin Totally to the Start Menu, right-click **Totally** in the Start Menu and select **Pin to Start Menu**. To unpin, right-click **Totally**'s Start Menu icon and select **Unpin from Start Menu**.



To create a desktop icon for Totally, right-click **Totally** in the Start Menu and select **Send to > Desktop (create shortcut)**.



Layers of budgeting

Totally makes use of a budgeting trick we call layering. This is a way of separating different types of transaction in a way that helps stop you from running out of money.

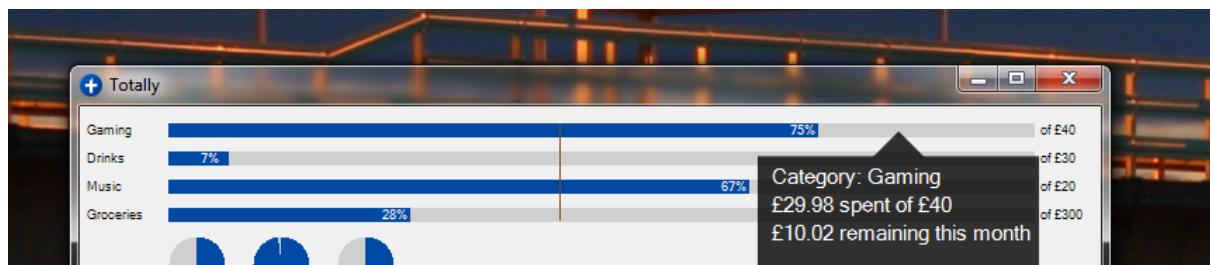
The first layer is where you put all the usual incomes you receive and expenditures that you make. Your grocery shopping, money spent commuting, and shoe shopping all go in the first layer along with your pay or allowance.

The second layer is for one-off expenditures that you need to save up for. Getting a new phone or laptop? Put them in the second layer as soon as you know which one you want, and Totally will start adding to your savings (as long as you're spending sensibly).

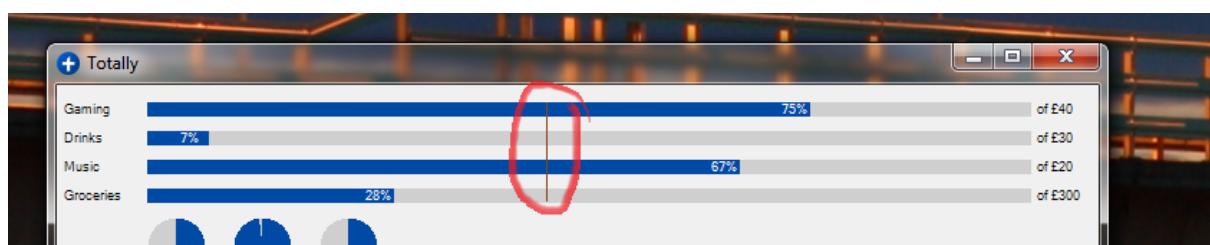
The third layer is used for expenditures that you don't know much about until they happen. For instance, you don't know when your car is going to break down or how much it'll cost to fix if it does. By adding car maintenance as a third layer item, Totally will try to ensure that you've always got enough put away for when disaster strikes.

Basics

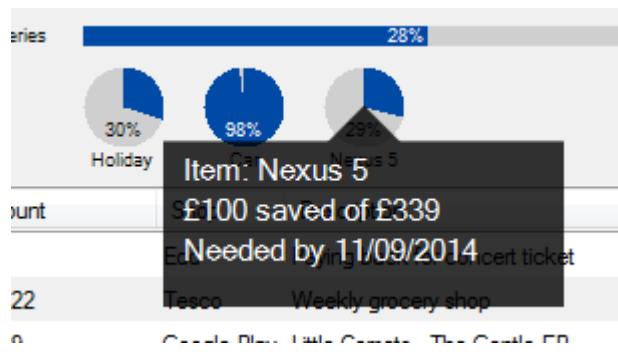
The blue bars show you how much you've spent in each category and how much you've got left to spend that month. Click one to open its details panel.



The red line shows you how far through the current month you are, to help you budget the right amount.



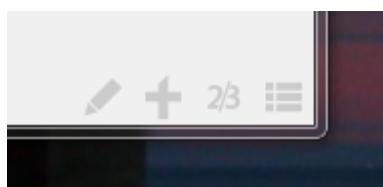
The pie charts show you all your second and third layer items, with the blue section representing how much you've saved so far. Click one to view more details.



The main part of the screen is taken up by the transaction history. This lists information about all incomes and first-layer expenditures you've made.

30% Holiday 98% Car 28% Nexus 5				
Amount	Shop	Description	Date and Time	Category
-£11	Edd	Paying back for concert ticket	12/03/2014 18:37	Music
-£78.22	Tesco	Weekly grocery shop	12/03/2014 08:00	Groceries
-£2.49	Google Play	Little Comets - The Gentle EP	11/03/2014 18:39	Music
-£5.35	Sainsburys	Cake ingredients for Kate's birthday	10/03/2014 13:07	Groceries
-£2.19	Starbucks	Coffee with Max	08/03/2014 12:00	Drinks
-£29.98	Steam	Two copies of Rust, one for me and one for Josh	05/03/2014 20:00	Gaming

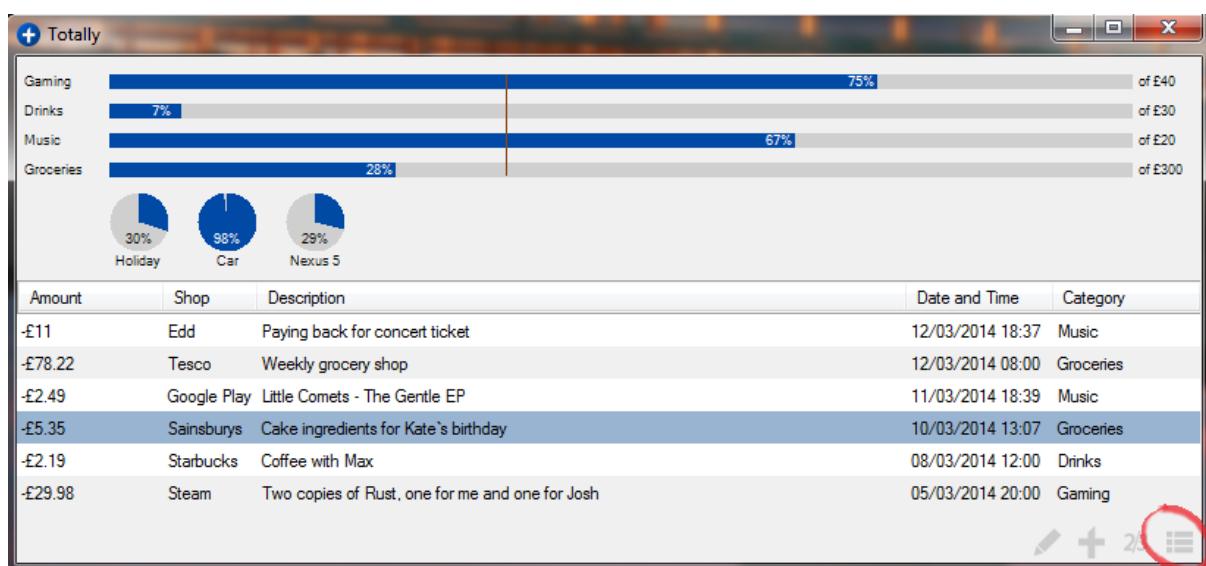
In the bottom right are four buttons. From left to right, these buttons are used for: editing an item; adding a transaction; adding an item; and choosing categories. Their use will be covered later in this manual.

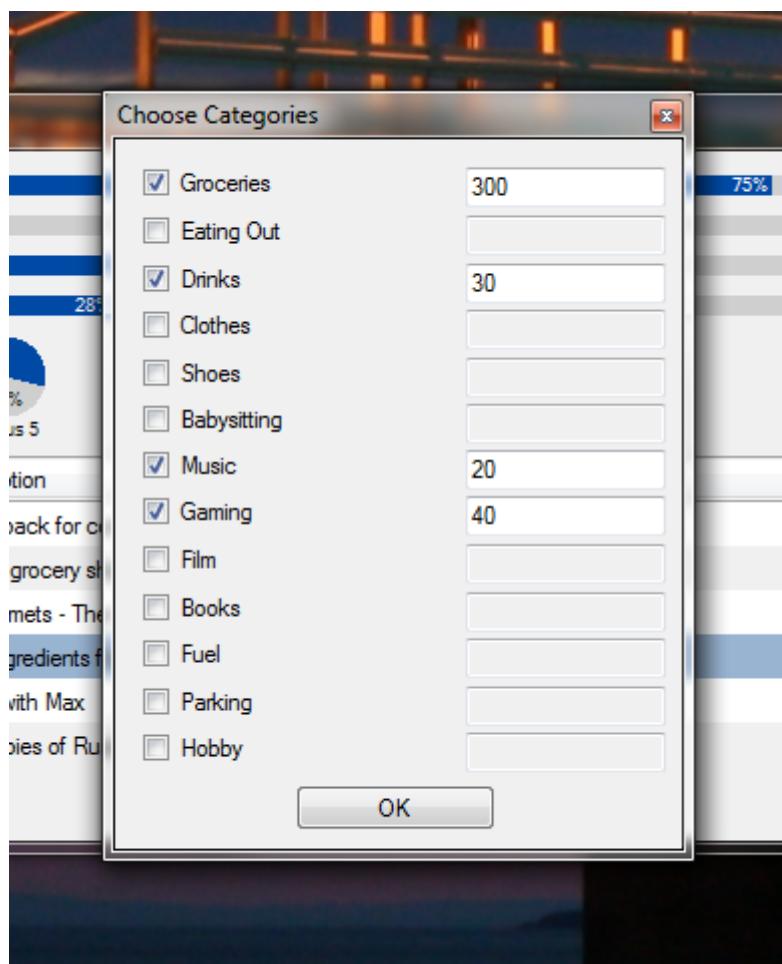


Selecting categories

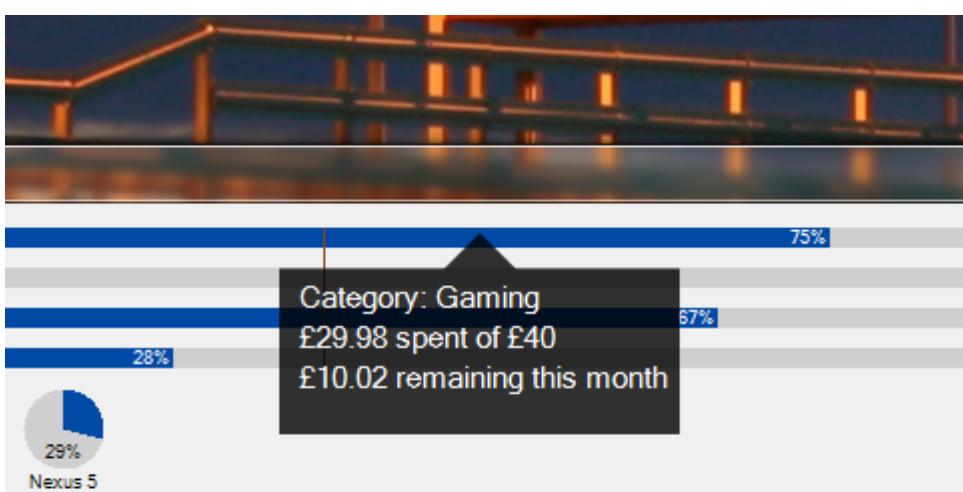
In Totally, all first-layer transactions are put into categories. This allows you to budget a different amount for groceries as you would for gaming. It also means you can hide categories that aren't relevant to you.

To select categories, click on the checklist icon in the bottom right. Tick all the boxes that apply to you, and type in how much you want to spend in each category in a month. These shouldn't add up to more than you earn in a month.





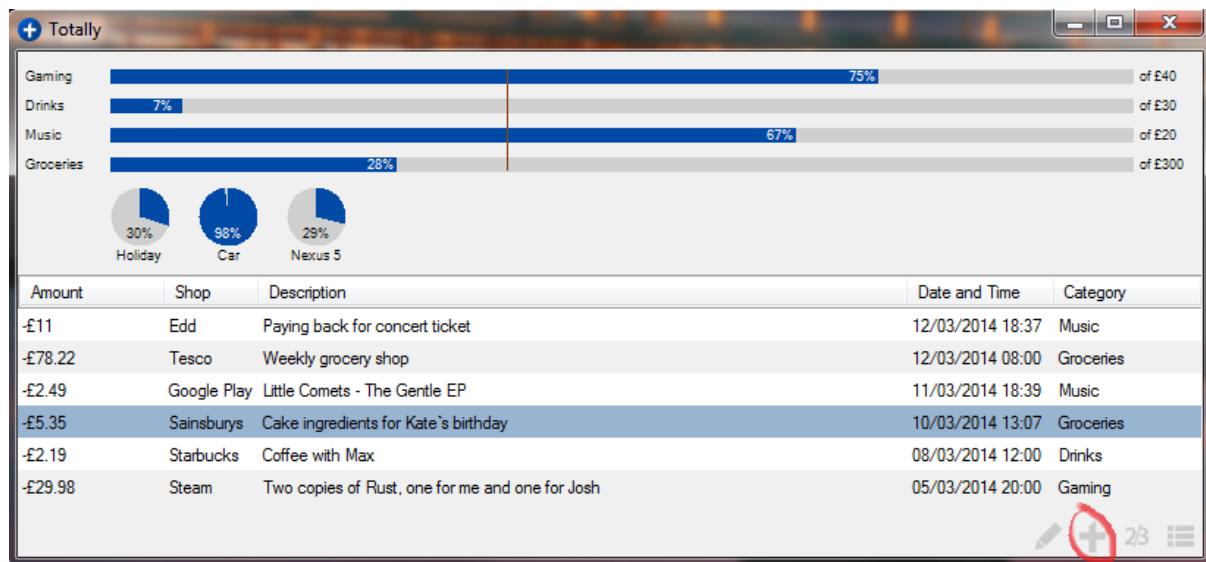
Once you've selected categories, you can click on any of the category bars to view details. Click outside to close the details panel.

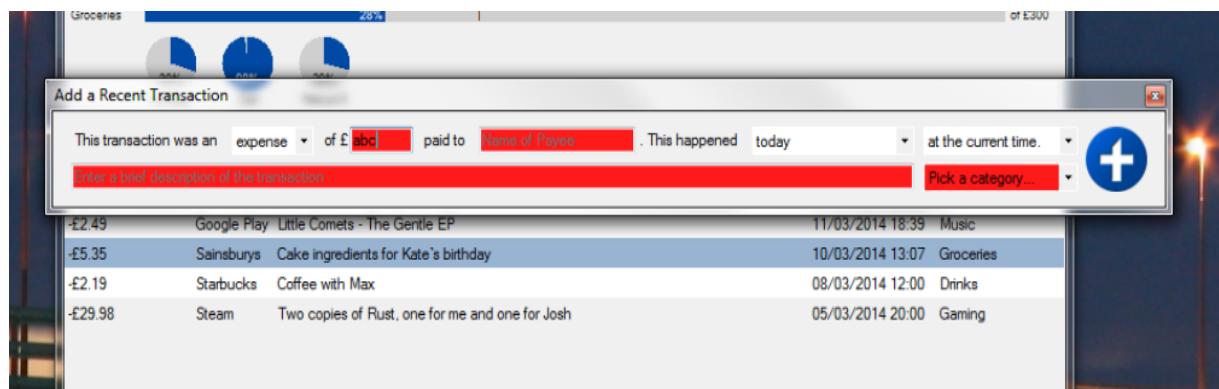


Description	Date and
aying back for concert ticket	12/03/20
Weekly grocery shop	12/03/20
Title Comets - The Gentle FP	11/03/20

Adding a transaction

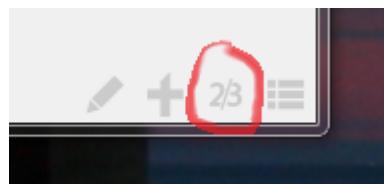
To add a transaction to the first layer, open Totally and click on the + icon in the bottom right. Type the details of the transaction into the boxes and press the + button on the right. If all the details are valid, the transaction will be added to the system. If there's a mistake, Totally will let you know where it is so you can correct it.





Adding an item

To add a second or third layer item, click the 2/3 icon in the bottom right and enter the details of the item. Change the dropdown box depending on whether it's a second or third layer item – items in the third layer don't have due dates.



Once you've added an item, you can click on its pie to view details. Click outside to close the details panel.

Editing a transaction

To edit a transaction that's already been added, double-click the cell you're trying to edit and then type a new value. When you've typed it, **press enter** - if you click outside the cell when you're editing it, your changes won't be saved. Once you've pressed enter, if the input was valid, the changes will save to the system. If there's a mistake, Totally will tell you what's wrong so you can change it.

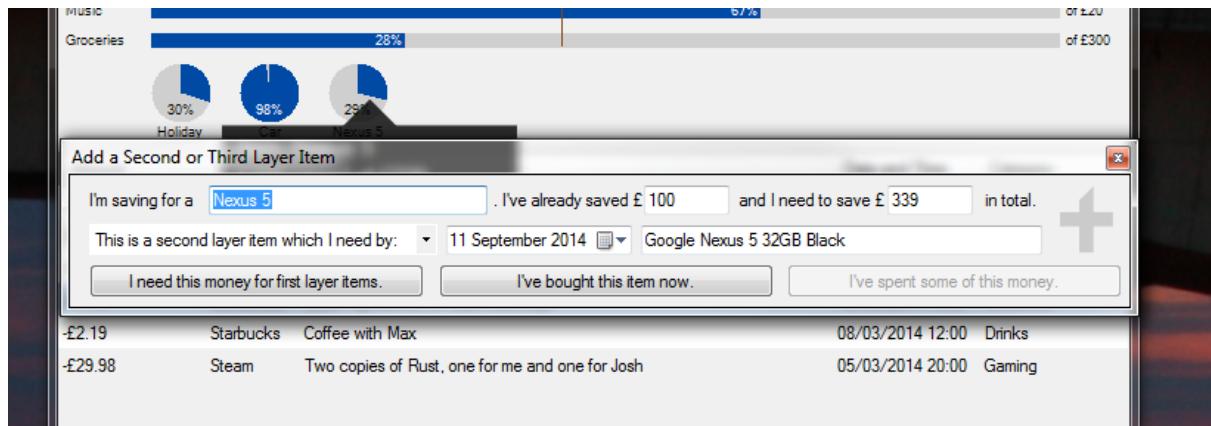
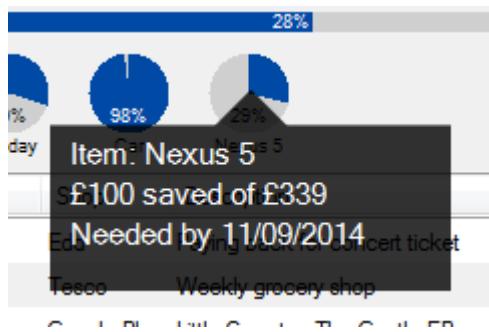
£2.49	Google Play	Little Comets - The Gentle EP	11/03/2014 18:39	Music
-£5.35	Sainsburys	Cake ingredients for Kate's birthday	10/03/2014 13:07	Groceries
-£2.19	Starbucks	Coffee with Max	08/03/2014 12:00	Drinks
-£29.98	Steam	Two copies of Rust, one for me and one for Josh	05/03/2014 20:00	Gaming

£2.49	Google Play	Little Comets - The Gentle EP	11/03/2014 18:39	Music
-£5.35	Sainsburys	Cake ingredients for Kate's birthday	10/03/2014 13:07	Groceries
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-£29.98	Steam	Two copies of Rust, one for me and one for Josh	05/03/2014 20:00	Gaming

Editing an item

To edit a second or third layer item, click on its pie to bring up the details panel then click on the edit button in the bottom right. Edit the fields you want to edit, then press the + button on the right.



Deleting

To delete a transaction, just change its amount to 0 using the method described in [Editing a transaction](#).

To delete a second or third layer item, change its total amount to 0 using the method described in [Editing an item](#).

Spending money

When you spend money in the first layer, the method to add this to Totally is described in [Adding a transaction](#).

When you buy something you've been saving for in the second layer, edit the item and then press **I've bought this item now**.

When you spend money on something in your third layer, edit the item and then press **I've spent some of this money**, then enter the amount you've spent and press **Submit**.

Running out of money

If you are at risk of running out of money, you can get some back from your second and third layer savings by editing the item and pressing **I need this money for first layer items**. This will return all the money you've saved in that item, making it available to spend on first layer items.

Setting up on mobile

Setting Totally up to work with your mobile takes a few more steps. You'll need an account at www.ifttt.com and a phone that can send emails. If you have both of these, log into your ifttt account and find the recipe called Totally (id 153208) then press the Use Recipe button. You might still need to connect the relevant channels – ifttt will talk you through this if it applies to you.

The screenshot shows the IFTTT interface for the 'Totally' recipe. At the top, there's a header with the word 'Totally'. Below it, a link to 'My Shared Recipes' and social sharing buttons for Twitter and Facebook. The main area displays a flow diagram: an envelope icon labeled 'Send IFTTT an email tagged' points to a blue diamond icon labeled 'Create a text file'. Below this diagram, a note reads: 'Notes: Using Totally for budgeting? This recipe enables the mobile app.' At the bottom, it says 'by benplumley March 13, 2014' and features four small icons: a heart, a pencil, a flag, and a downward arrow. A large blue button at the very bottom left says 'Use Recipe'.

Now that ifttt is set up, to add a transaction you just need to send an email from your phone to trigger@ifttt.com with the subject #budget in the following format:

```
True
:1:
AMOUNT
:2:
SHOP
:3:
DESCRIPTION
:4:
CATEGORY
:5:
1
:6:
```

You'll need to change anything in capitals to the value it should have. On Android phones, it's easy to set up a shortcut to open a new email with this template. On iOS, you can make a draft email in this format instead.

Now, every time you start your computer, any transactions you added more than fifteen minutes ago will add to the budget database, provided you have an internet connection.

Troubleshooting

In this section are a few common errors and how to correct them.

The installer gives a red error message

```
Creating appdata folder...
Appdata folder already exists. Continuing...
Copying blank database to appdata folder...
Database already exists. Continuing...
Copying files to Program Files folder...
Files already exist. Continuing...
Files already exist. Continuing...
Files already exist. Continuing...
Files already exist. Continuing...
Copying files to startup folder...
Files already exist. Continuing...
Creating dropbox folder...
Dropbox folder already exists. Continuing...
Copying files to dropbox folder...
Files already exist. Continuing...
An error occurred. Extract the files from the zip archive again and run the installer without moving or renaming any files in the extracted directory.
Error details: The system cannot find the file specified
Press any key to close this installer and fix the error before trying again.
```

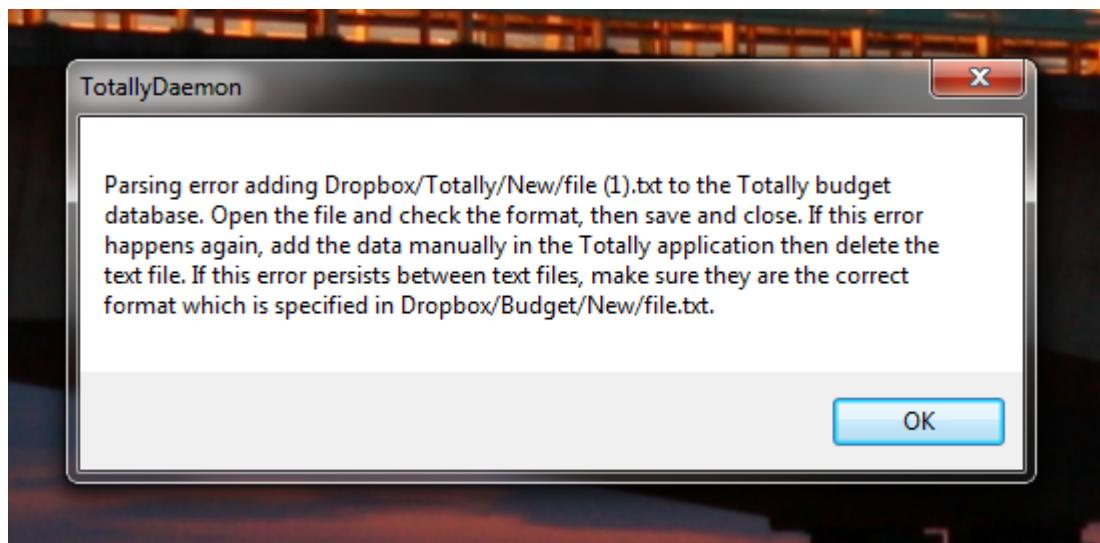
This message is caused by the installer trying to copy files to the computer that it can't find. To fix it, delete the extracted files and extract them again. Don't change anything before you run the installer.

The installer gives a different red error message

```
Creating appdata folder...
Appdata folder already exists. Continuing...
Copying blank database to appdata folder...
Database already exists. Continuing...
Copying files to Program Files folder...
Files already exist. Continuing...
Files already exist. Continuing...
Files already exist. Continuing...
Copying files to startup folder...
Files already exist. Continuing...
Creating dropbox folder...
Dropbox folder already exists. Continuing...
Copying files to dropbox folder...
Files already exist. Continuing...
An error occurred. Dropbox does not appear to be installed on this computer. Please install Dropbox and then run the installer again.
You can override this error if you are sure that Dropbox is installed. Would you like to? (Y/N)
```

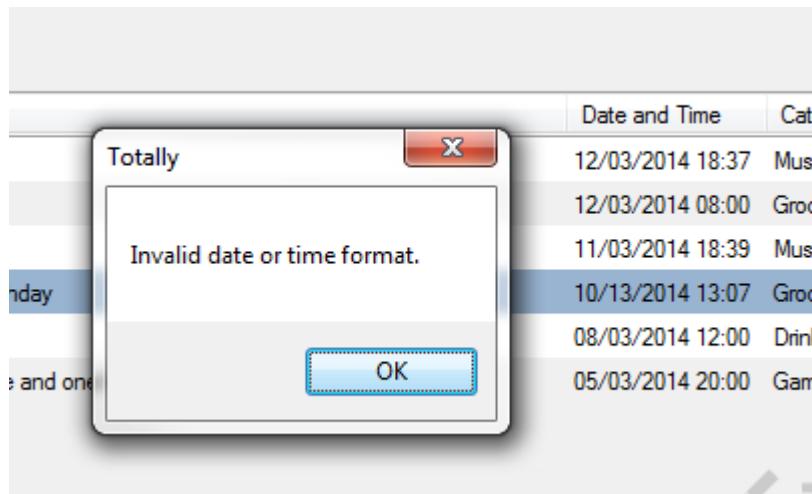
This error is caused by the program being unable to find the Dropbox folder. The most common cause of this error is that you've forgotten to install Dropbox. If you're sure that Dropbox is installed, press Y to override the error and the installer will provide instructions on how to manually fix the problem.

I get an error when I log on to Windows



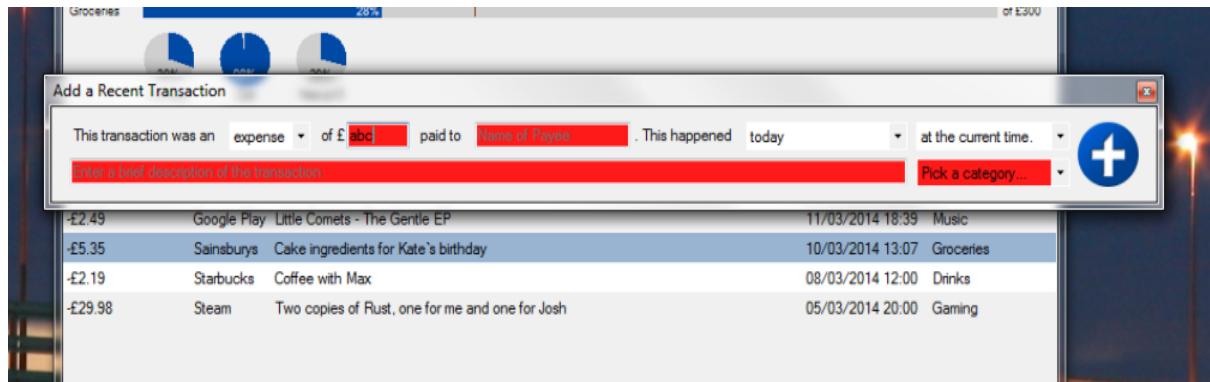
This means there's a problem with one of the files you added from your phone. Navigate to Dropbox\Totally\New and open the file mentioned in the error message - in this case 'file (1).txt'. If you can see what's wrong with it, edit it then save and close. If you can't, add the information manually by opening Totally and adding a transaction, and then delete the text file.

I get an error when I edit a transaction



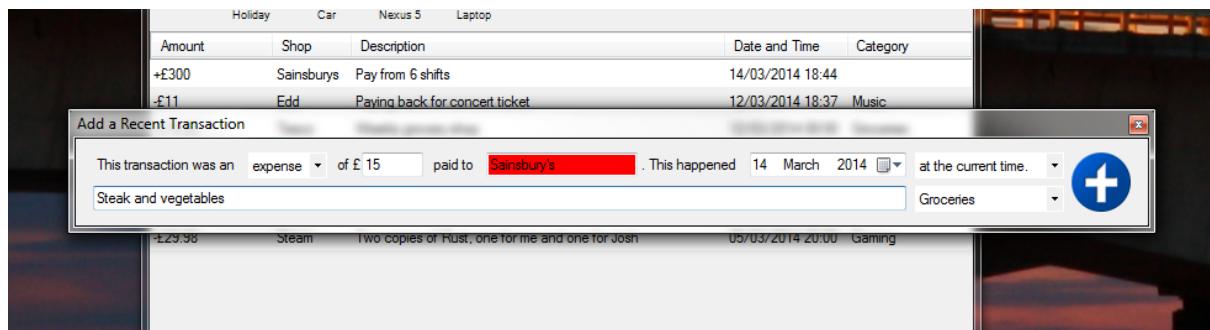
Totally will check the new data you've entered are correct before committing the change. In the above example, the date is rejected because the month number is 13. Similar errors will be displayed if you put a value into the Amount column that isn't an amount of money, or if you change the Category column to one that doesn't exist or isn't enabled.

It won't let me add a transaction or item



Any invalid fields will flash red when you press Add. In the above example, all fields are invalid because text has been entered in the amount box and all the other boxes have been left empty.

I can't put apostrophes in text boxes



Unfortunately, due to technical limitations of the database, you can't use apostrophes in any of the data values. The ` character (below escape) can be used as an alternative.