

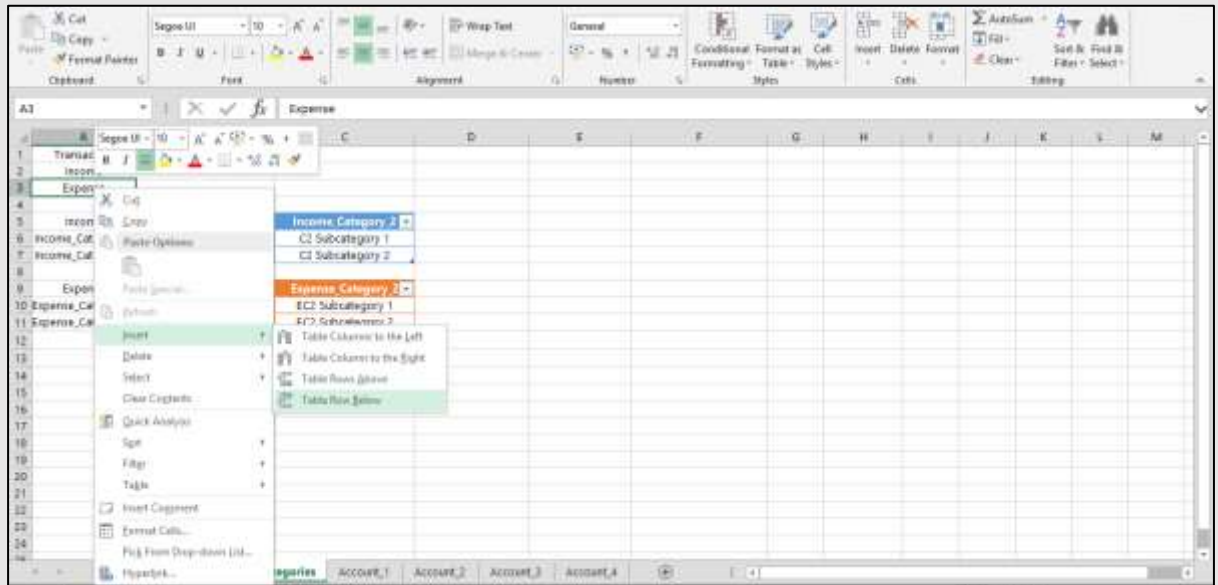
Expense Manager HOW TO's

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Adding a new transaction Type

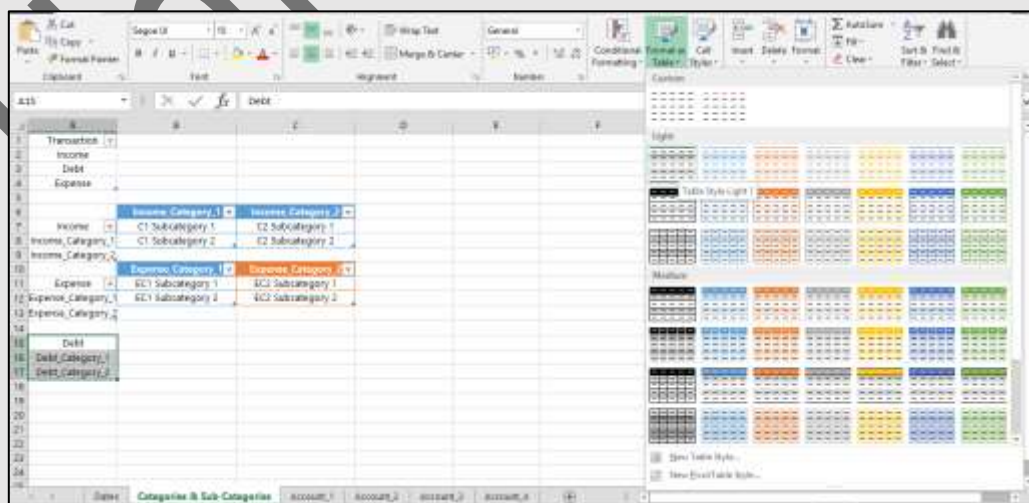
1. Right click on any of the cells under the transaction table in the Categories & Sub-Categories workbook.
2. Select Insert and Select Table Rows Above/Below according to your convenience



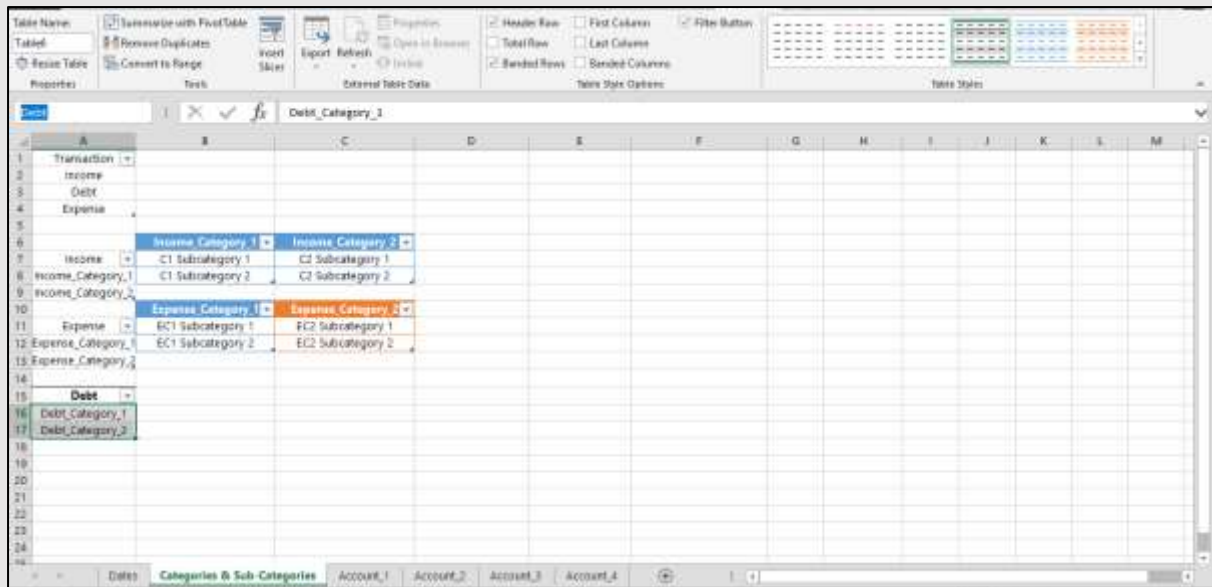
3. The added transaction type would reflect under transaction type column in all the sheets.

Adding New Category for a Transaction Type

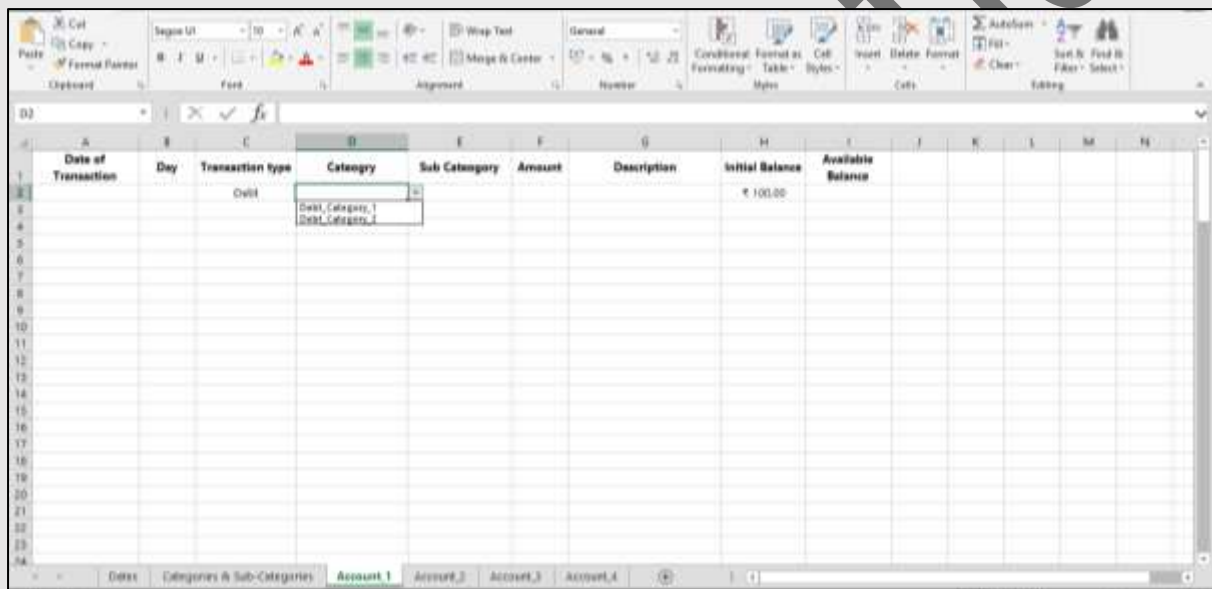
1. Go to the Categories and Sub-Categories Sheet
2. To create a category type which appears only on the specific transaction type follow the below steps. (Considering the Debt Transaction Type here)
 - a. Type in the transaction type for which the category is being created in a new cell (Debt in this case)
 - b. Enter the categories under that heading (make sure there are no spaces in the category)
 - c. Select the contents of the new category and format it as table by selecting the format as table under the home tab



- d. Select my table has headers in the popup which has appeared.
- e. Now select just the Categories and name it (in the name box highlighted in the image below) as the transaction type.

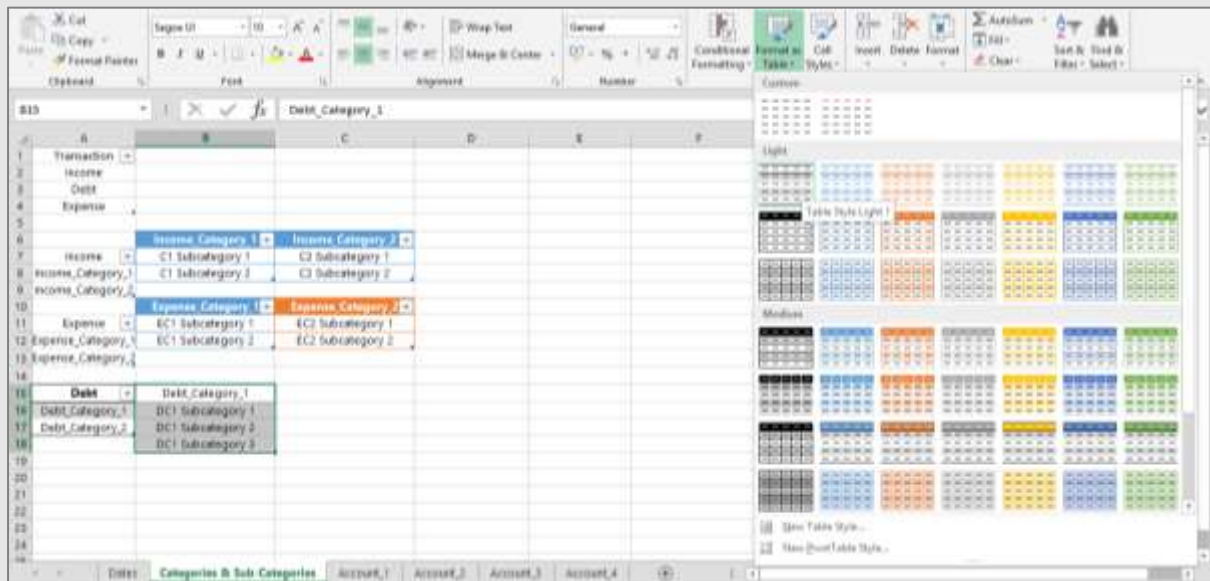


f. Now the categories would appear under the category column when the transaction type debt is selected

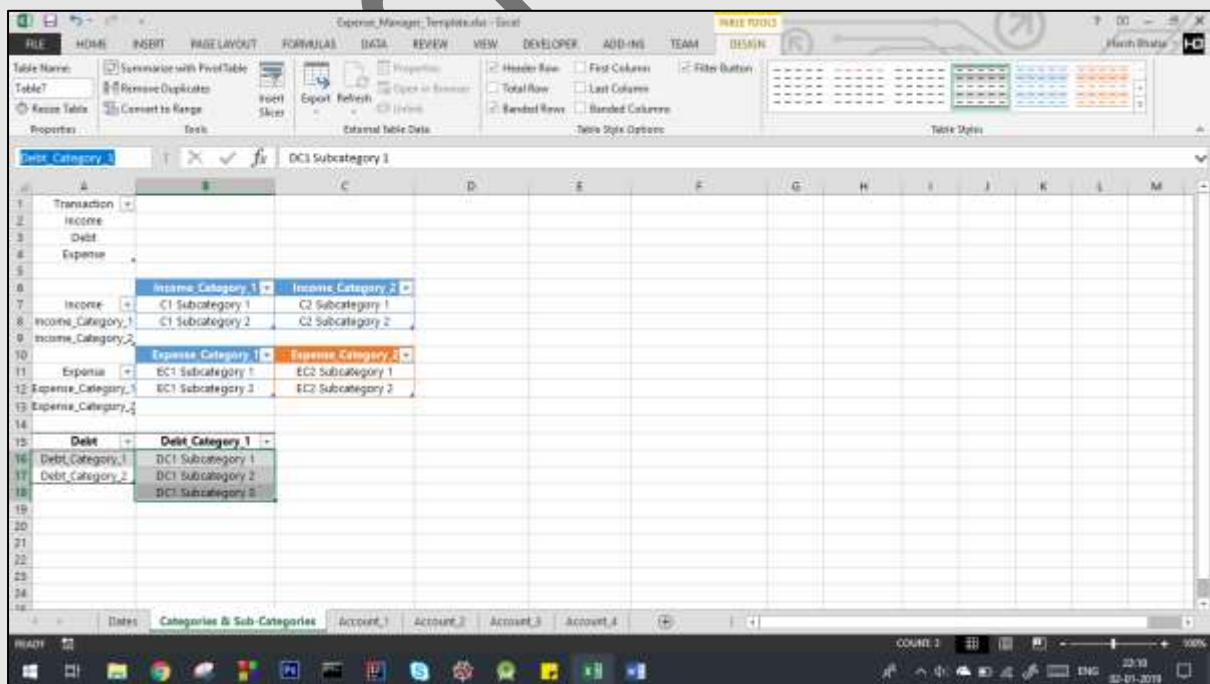


Adding a sub-category for a category

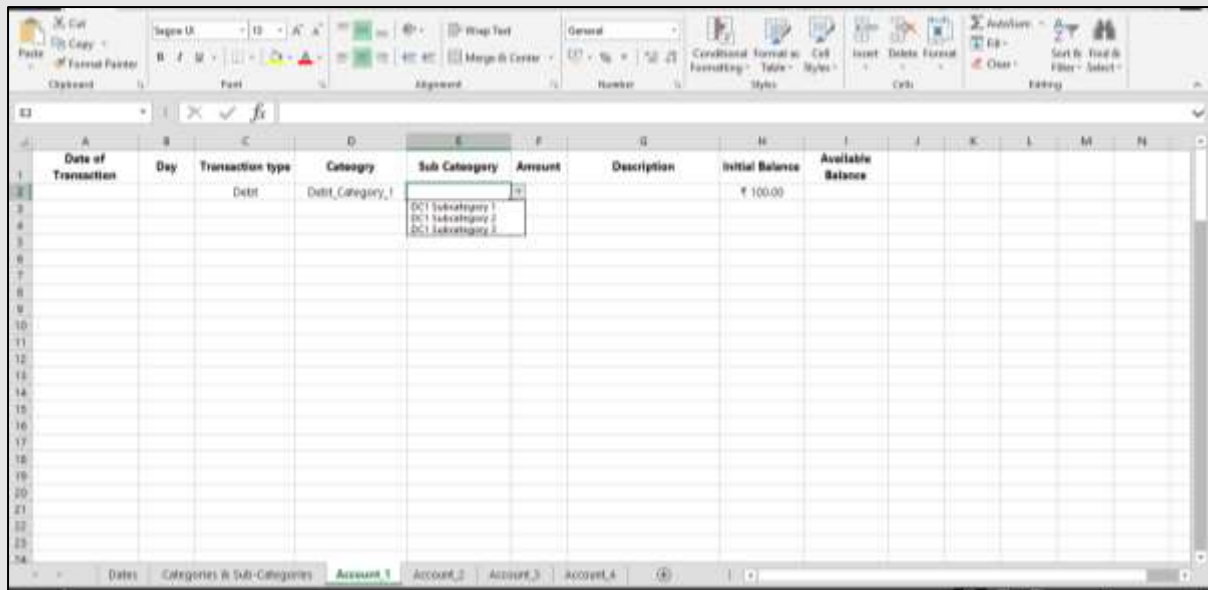
1. Go to the Categories and Sub-Categories Sheet
2. To create a Sub-Category type which appears only on the specific Category follow the below steps. (Considering the Debt_Category_1 here)
 - a. Type in the Category for which the category is being created in a new cell (Debt_Category_1 in this case)
 - b. Enter the Sub-categories under that heading (make sure there are no spaces in the Sub-category)
 - c. Select the contents of the new Sub-category and format it as table by selecting the format as table under the home tab



- d. Select my table has headers in the popup which has appeared.
- e. Now select just the Sub-categories and name it (in the name box highlighted in the image below) as the Category



- f. Now the Sub-categories would appear under the Sub-category column when the Category Debt_Category_1 is selected



The same procedure needs to be followed to add additional sub-categories.

Extending the Expense Input Area

The calculations have presently been applied to first 130 rows (to reduce the initial size of the sheet). To extend the calculations to the next set of cells, follow the steps below.

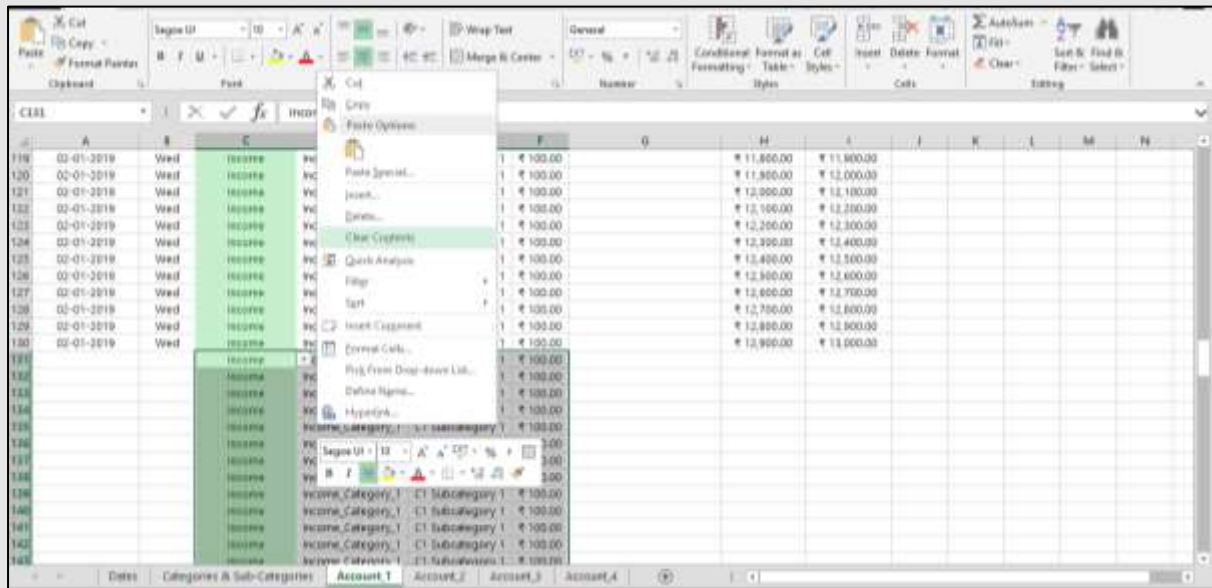
1. Here, the set is being extended from rows 131 to 250. Copy the last filled row and paste it from rows 131 to 250. (Here the screenshot depicts rows till 168 due to screen size limitations.

144	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,300.00	₹ 14,400.00
145	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,400.00	₹ 14,500.00
146	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,500.00	₹ 14,600.00
147	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,600.00	₹ 14,700.00
148	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,700.00	₹ 14,800.00
149	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,800.00	₹ 14,900.00
150	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 14,900.00	₹ 15,000.00
151	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,000.00	₹ 15,100.00
152	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,100.00	₹ 15,200.00
153	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,200.00	₹ 15,300.00
154	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,300.00	₹ 15,400.00
155	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,400.00	₹ 15,500.00
156	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,500.00	₹ 15,600.00
157	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,600.00	₹ 15,700.00
158	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,700.00	₹ 15,800.00
159	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,800.00	₹ 15,900.00
160	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 15,900.00	₹ 16,000.00
161	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,000.00	₹ 16,100.00
162	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,100.00	₹ 16,200.00
163	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,200.00	₹ 16,300.00
164	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,300.00	₹ 16,400.00
165	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,400.00	₹ 16,500.00
166	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,500.00	₹ 16,600.00
167	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,600.00	₹ 16,700.00
168	02-01-2019	Wed	Income	Income_Category_1	C1 Subcategory_1	₹ 100.00	₹ 16,700.00	₹ 16,800.00

2. Select the column A (Date) of the recently pasted rows and right click and select Clear Contents

[illegible]

- Columns C, D, E and F would be the only remaining columns. Select those and clear the contents for those too.



- Now, new transactions can be added in the just extended area.