



miexpenses.

**Expense Tracking Software
For Personal or Business Use**



**User Guide
Version 1.5.1**



Table of Contents

Table of Contents	2
Overview	4
Getting Started.....	4
The Expense Entry Screen.....	5
Adding a New Expense Entry	5
Deleting an Expense Entry	5
Editing an Expense Entry.....	5
The Expense Summary Screen	6
Viewing a Range of Expense Entries	6
Editing an Expense Entry from the Expense Summary Screen	6
Exporting Filtered Expense Entries	7
The Settings Screen.....	7
Adding a Client	7
Deleting a Client.....	7
Editing a Client	8
Adding a Project.....	8
Deleting a Project.....	8
Editing a Project	8
Adding an Expense Type	8
Deleting an Expense Type	8
Editing an Expense Type	9
Adding a Currency.....	9
Deleting a Currency.....	9
Editing a Currency	9
Adding a Payment Method	9
Deleting a Payment Method.....	9
Editing a Payment Method	10
Data Backup	10
Expenses Entry Screen Reference.....	11
Expenses Summary Screen Reference	11



Settings Screen Reference 12



Overview

Congratulations on your purchase of **miexpenses** expense tracking software.

We recommend that you take some time to read through the user guide to get the most out of **miexpenses**.

The **miexpenses** software is expense tracking software designed to help you track your personal or business expenses.

Getting Started

We recommend the following usage sequence:

- To get started, when you first enter the application you should enter all the clients, projects, expense type, currencies, and payment methods, if these are known to you.
- Start entering expense entries.
- [Export expense entries](#) via email as required.

The **miexpenses** software stores all data locally on your Blackberry and does not need access to the network, except when [exporting data](#). Future versions of the **miexpenses** software will include localized captions, prompts, and error messages.



The Expense Entry Screen

The expenses entry screen is where all adding, deleting, and editing of expense entries is performed.

The screenshot shows the 'miExpenses' application interface. The form contains the following fields and values:

Date:	24 Nov 2009
Type:	Hotel
Client:	Client 2
Project:	PRD-0923L
Description:	Sales meeting with client
Quantity:	1
Unit price:	122.70
Tax 1:	19.97
Tax 2:	
Total amount:	142.67
Currency:	US Dollars
Payment method:	Credit

Adding a New Expense Entry

To add new expense entries select the “New” menu options from the Blackberry menu. Once all data required is entered for the current entry select the “Save” menu option from the Blackberry menu.

Deleting an Expense Entry

Using either the [summary list](#) or the navigation buttons, select the expense entry you wish to delete. Once selected, on the Blackberry menu select the “Delete” menu option.

Editing an Expense Entry

Using either the [summary list](#) or the navigation buttons, select the expense entry you wish to edit. Once selected, modify the data required. After the required changes have been completed, from the Blackberry menu select the “Save” option.



The Expense Summary Screen

The Expense Summary screen is a multipurpose screen. From this screen you can filter expense entries for a given date range and expense type and send the list via email in a Microsoft® Excel format. Also the screen will allow you to select one of the entries within the filtered list and edit the entry.

Viewing a Range of Expense Entries

The miexpenses software allows for viewing a filtered list of expense entries that fall within a selected starting and ending date. To view a filtered list, from the [Expense Entry Screen](#) select “View Expenses” on the Blackberry menu.

Select the desired “From” and “To” dates and / or the expense “Type” on the Expense Summary Screen for which you wish to view expense entries. Once you have chosen the desired dates and expense type, from the Blackberry menu select the “Filter” menu options.

miExpenses - View	
From:	1 Nov 2009 To: 30 Nov 2009
Type:	--All--
Expenses 1 Nov 2009 - 30 Nov 2009	
1 Nov 2009	\$142.67
Hotel	
6 Nov 2009	\$23.65
Meals	
10 Nov 2009	\$60.48
Mileage	
11 Nov 2009	\$74.00
Fuel	
13 Nov 2009	\$184.57
Office Supplies	
14 Nov 2009	\$54.61
Meals	
18 Nov 2009	\$83.16
Mileage	
18 Nov 2009	\$267.25
Hotel	
21 Nov 2009	\$65.00
Fuel	
24 Nov 2009	\$94.56
Entertainment	
Total Expense \$1049.95	

Editing an Expense Entry from the Expense Summary Screen

To edit an expense entry, filter the expenses entry list then select the item you wish to edit. To initiate an edit select either the green arrow on the far right of the selected entry, or from the Blackberry menu select the “Edit” menu option. The [Expense Entry screen](#) will now be displayed with the selected expense entry data displayed.

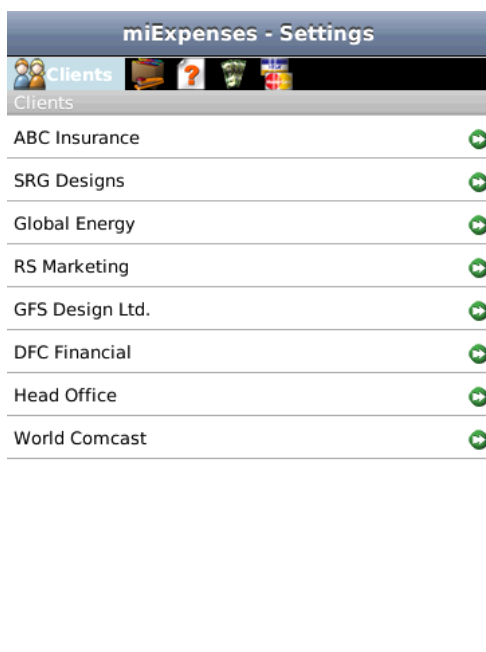


Exporting Filtered Expense Entries

On the [Expense Summary Screen](#) select the range of expense entries you wish to export. Once filtered, from the Blackberry menu select the “*Email Filtered List*” menu option. You will be prompted to select an email address to which you would like to send the exported file.

The Settings Screen

The settings screen is used for managing the lists of selectable fields within the **miexpenses** software.



Adding a Client

On the [Settings Screen](#) select the “*Clients*” toolbar button. From the Blackberry menu select the “*Add Client*” menu option. After entering the client information press the “*Enter*” key to accept the changes.

Deleting a Client

On the [Settings Screen](#) select the “*Clients*” toolbar button. Select the client you wish to delete from the clients list. From the Blackberry menu select the “*Delete*” menu option.

Note: Once a client is deleted all time entries with reference to that client will have the “*Client*” field set to “*blank*”.



Editing a Client

On the [Settings Screen](#) select the “*Clients*” toolbar button. Select the client you wish to edit from the clients list. From the Blackberry menu select the “*Edit*” menu option. Make the required changes and press the “*Enter*” key to accept the changes.

Adding a Project

On the [Settings Screen](#) select the “*Projects*” toolbar button. From the Blackberry menu select the “*Add Project*” menu option. After entering the project information press the “*Enter*” key to accept the changes.

Deleting a Project

On the [Settings Screen](#) select the “*Projects*” toolbar button. Select the project you wish to delete from the projects list. From the Blackberry menu select the “*Delete*” menu option.

Note: Once a project is deleted all time entries with reference to that project will have the “*Project*” field set to “*blank*”.

Editing a Project

On the [Settings Screen](#) select the “*Projects*” toolbar button. Select the project you wish to edit from the projects list. From the Blackberry menu select the “*Edit*” menu option. Make the required changes and press the “*Enter*” key to accept the changes.

Adding an Expense Type

On the [Settings Screen](#) select the “*Expense Types*” toolbar button. From the Blackberry menu select the “*Add Expense Type*” menu option. After entering the expense type information press the “*Enter*” key to accept the changes.

Deleting an Expense Type

On the [Settings Screen](#) select the “*Expense Types*” toolbar button. Select the expense type you wish to delete from the expense types list. From the Blackberry menu select the “*Delete*” menu option.

Note: Once an expense type is deleted all expense entries with reference to that expense type will have the “*Type*” field set to “*blank*”.



Editing an Expense Type

On the [Settings Screen](#) select the “Expense Types” toolbar button. Select the expense type you wish to edit from the expense types list. From the Blackberry menu select the “Edit” menu option. Make the required changes and press the “Enter” key to accept the changes.

Adding a Currency

On the [Settings Screen](#) select the “Currencies” toolbar button. From the Blackberry menu select the “Add Currency” menu option. After entering the currency information press the “Enter” key to accept the changes.

Deleting a Currency

On the [Settings Screen](#) select the “Currencies” toolbar button. Select the currency you wish to delete from the currency list. From the Blackberry menu select the “Delete” menu option.

Note: Once a currency is deleted all expense entries with reference to that currency will have the “Currency” field set to “blank”.

Editing a Currency

On the [Settings Screen](#) select the “Currencies” toolbar button. Select the currency you wish to edit from the currency list. From the Blackberry menu select the “Edit” menu option. Make the required changes and press the “Enter” key to accept the changes.

Adding a Payment Method

On the [Settings Screen](#) select the “Payment Methods” toolbar button. From the Blackberry menu select the “Add Payment Method” menu option. After entering the payment method information press the “Enter” key to accept the changes.

Deleting a Payment Method

On the [Settings Screen](#) select the “Payment Methods” toolbar button. Select the payment method you wish to delete from the payment methods list. From the Blackberry menu select the “Delete” menu option.

Note: Once a payment method is deleted all expense entries with reference to that payment method will have the “Payment method” field set to “blank”.



Editing a Payment Method

On the [Settings Screen](#) select the “*Payment Methods*” toolbar button. Select the payment method you wish to edit from the payment methods list. From the Blackberry menu select the “*Edit*” menu option. Make the required changes and press the “*Enter*” key to accept the changes.

Data Backup

Currently this version of **miexpenses** only supports backing up data by exporting into the CSV file format using the [Expense Summary Screen](#). View the topic [Exporting Filtered Expense Entries](#) for help on exporting data.



Expenses Entry Screen Reference

miExpenses

Move to previous expense entry ← → Move to next expense entry

Date:	24 Nov 2009
Type:	Hotel
Client:	Client 2
Project:	PRD-0923L
Description:	Sales meeting with client
Quantity:	1
Unit price:	122.70
Tax 1:	19.97
Tax 2:	
Total amount:	142.67
Currency:	US Dollars
Payment method:	Credit

Expenses Summary Screen Reference

miExpenses - View

From: 1 Nov 2009 To: 30 Nov 2009

Type: --All--

Expenses 1 Nov 2009 - 30 Nov 2009

Expense Date	Expense Type	Expense Amount	Edit Expense Item
1 Nov 2009	Hotel	\$142.67	
6 Nov 2009	Meals	\$23.65	
10 Nov 2009	Meals	\$60.48	
11 Nov 2009	Fuel	\$74.00	
13 Nov 2009	Office Supplies	\$184.57	
14 Nov 2009	Meals	\$54.61	
18 Nov 2009	Mileage	\$83.16	
18 Nov 2009	Hotel	\$267.25	
21 Nov 2009	Fuel	\$65.00	
24 Nov 2009	Entertainment	\$94.56	
Total Expense		\$1049.95	



Settings Screen Reference

The screenshot shows the 'miExpenses - Settings' window. At the top, there is a toolbar with several icons, including a 'Clients' icon. A red arrow labeled 'Toolbar' points to this icon. Below the toolbar is a list of clients, each with a green edit icon to its right. A red arrow labeled 'Edit Item' points to the edit icon for 'Global Energy'. The list of clients includes:

Client Name	Edit Icon
ABC Insurance	Green edit icon
SRG Designs	Green edit icon
Global Energy	Green edit icon
RS Marketing	Green edit icon
GFS Design Ltd.	Green edit icon
DFC Financial	Green edit icon
Head Office	Green edit icon
World Comcast	Green edit icon