

INCOME & EXPENDITURE CATEGORIES

Setting up your income and expenditure categories is a very simple exercise.

Go > Home > Management Reports > Setting Finances > Income/Expenditure Category Manager >

The Income/Expenditure Category manager is a simple form with a list of income categories on the left hand side, and expenditure categories on the right hand side.

The screenshot shows the 'Category Manager' window with two main sections: 'Income Categories' and 'Expenditure Categories'. Each section contains a table of categories, a form for editing a selected category, and buttons for 'Add New', 'Delete', and 'Save'. A 'Help' button is located at the bottom right.

In Use	Type	Name
*	Fee Income	Fee Income
*	Other Income	Other Income

In Use	Type	Name
*	Variable	Activities and Materials
*	Fixed	Staff Costs
*	Fixed	Premises Expenses
*	Fixed	Admin Expenses
*	Fixed	Other Expenses
*	Loan Interest	Loan Interest
*	Tax Paid	Tax Paid
*	Dividend Paid	Dividend Paid

SuperFox comes with a list of income and expenditure categories to get you started and you can rename these categories to suit yourself. Just select them, enter a new name and press Save to save your change.

Notice that the category lists show:

- The category name (Activities and Materials)
- The type label (Variable)
- An asterisk is displayed if the category has is being used.

In Use	Type	Name
*	Variable	Activities and Materials
*	Fixed	Staff Costs
*	Fixed	Premises Expenses
*	Fixed	Admin Expenses
*	Fixed	Other Expenses
*	Loan Interest	Loan Interest
*	Tax Paid	Tax Paid
*	Dividend Paid	Dividend Paid

(You cannot delete a category that is being used, but you can rename it and change it to a different type.)

Adding Your Own Categories

It is very simple to add your own income and expenditure categories.

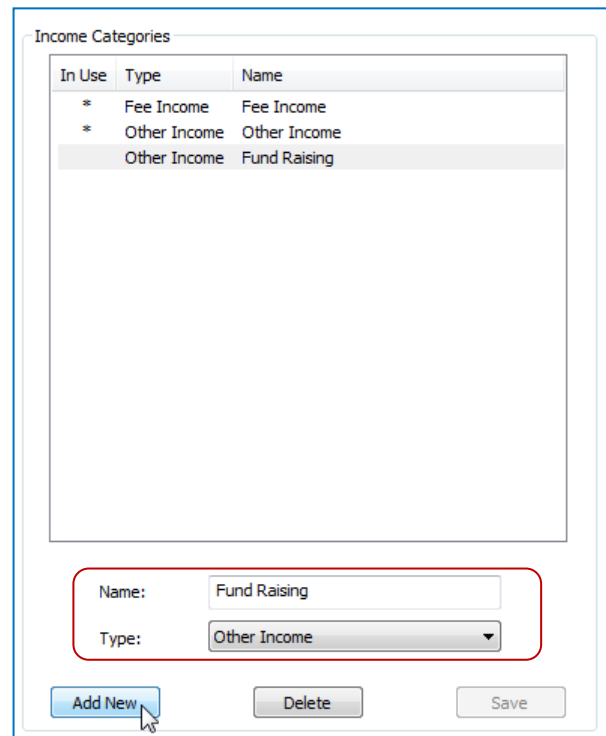
Just click on the **'Add New'** button under the appropriate list. This creates a new category in the list.

When the new category appears all you need to do is:

- Type in your category name.
- Choose a type.
- Press **'Save'** to save your work.

Here we added an income category called 'Fund Raising' and we labelled it as being type 'Other Income' using the drop-down Type list.

If you change your mind about your new category you can delete it using the **'Delete'** button.



The screenshot shows a window titled "Income Categories". At the top is a table with three columns: "In Use", "Type", and "Name". The table contains three rows: a header row, a row with "*" in "In Use", "Fee Income" in "Type", and "Fee Income" in "Name"; a second row with "*" in "In Use", "Other Income" in "Type", and "Other Income" in "Name"; and a third row with "Other Income" in "Type" and "Fund Raising" in "Name". Below the table is a form with a "Name:" label and a text input field containing "Fund Raising", and a "Type:" label and a dropdown menu currently showing "Other Income". A red box highlights these two fields. At the bottom of the form are three buttons: "Add New" (highlighted with a mouse cursor), "Delete", and "Save".

End