



HiMoney User Guide

Version: 1.0
License: Freeware
Website: <http://www.HiMobiler.com>

Overview

HiMoney is a personal finance tracker that you can

- Keep Records of Expense and Income Transaction
- Manage Records by Accounts with Budgeting
- Produce Monthly and Weekly 3D Chart Reports
- Compare Budget and Actual Expense and Income in Pie Chart



Installation

After download the file, unzip it and install **himoney.prc** using the Install Tool to your Palm. Besides, for the first time of installation, you should install our Icon sets **sanwaicons.prc** as well.

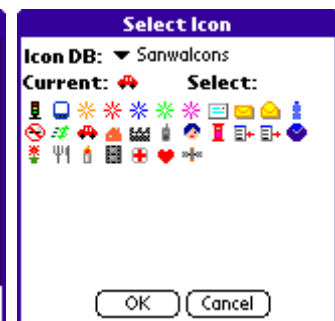
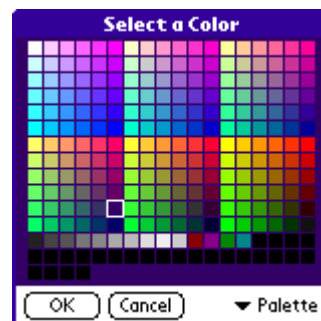
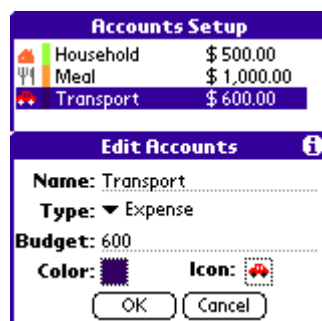
Setup Accounts

Before you start to use HiMoney to keep your financial records, you need to setup the Accounts first. The Accounts will be used for data analysis.

To bring up the Accounts Setup, click the List icon as show and choose Accounts Setup.

In HiMoney, you can set the following properties of each account,

- | | |
|--------------|--|
| Account Name | <i>* suggested less than 20 characters</i> |
| Account Type | <i>i.e. Income / Expense</i> |
| Budget | <i>* monthly, compare it with actual</i> |
| Color | <i>* mainly use in the Budget vs Actual Pie Chart</i> |
| Icon | <i>* select you favorite icons to represent the Accounts</i> |



Setup Preference

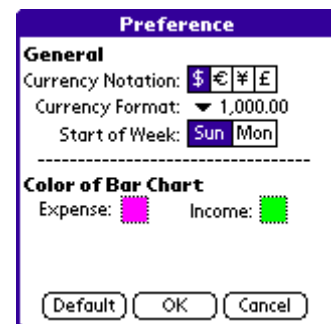
Next you may setup the Preference, which is the global settings of HiMoney, such as

Currency Notation

Currency Format

Start of Week

Color of Bar Chart



The Preference dialog box has a title bar 'Preference'. It contains two sections: 'General' and 'Color of Bar Chart'. In the 'General' section, 'Currency Notation' has buttons for \$, €, ¥, and £; 'Currency Format' is a dropdown set to '1,000.00'; and 'Start of Week' has buttons for Sun and Mon. The 'Color of Bar Chart' section has 'Expense' with a pink color swatch and 'Income' with a green color swatch. At the bottom are 'Default', 'OK', and 'Cancel' buttons.

How to Use

HiMoney will show the finance records day by day, separated by its Account type, i.e. Expense and Income. You can applied the filtered to show records of specific Account and Category. Total of the Expense / Income of that day will automatically calculated.

To change the day, you can click the date directly and select it, or the arrow to go to next or previous day.



The HiMoney main screen shows a date filter '01 Aug 04' with left and right arrows. To the right is a dropdown menu 'All' and a label 'All Accounts'.



The HiMoney main screen shows a filter dropdown set to 'Expense'. To the right is 'Total: \$ 0.00'. Below the filter are icons for a list, a bar chart, and a pie chart. At the bottom are 'New' and 'Details' buttons.

To add a new record, first choose Expense or Income, and then click the New button.



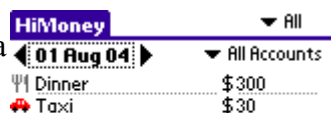
The HiMoney main screen shows a date filter '01 Aug 04' with left and right arrows. To the right is a dropdown menu 'All' and a label 'All Accounts'.

To edit a record, select the target record first from the main screen and then click Details button. If you are editing the field Item, To or Form, HiMoney will remember what you have typed and try to autocomplete word next time for you.

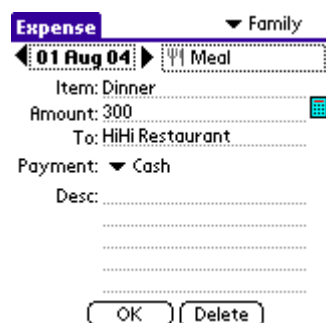


The HiMoney main screen shows a filter dropdown with 'Expense' and 'Income' options. To the right is 'Total: \$ 0.00'. Below the filter are icons for a list, a bar chart, and a pie chart. At the bottom are 'New' and 'Details' buttons.

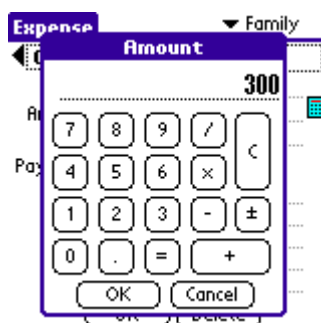
Besides, you can also edit the data directly on the main screen. The data will be stored into the database automatically, and the Total will be refreshed.



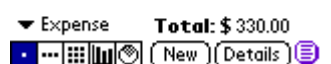
The HiMoney main screen shows a list of records for '01 Aug 04'. The list has two columns: 'Item' and 'Amount'. The first record is 'Dinner' with an amount of '\$300'. The second record is 'Taxi' with an amount of '\$30'. To the right of the list is 'Total: \$ 330.00'. Below the list are icons for a list, a bar chart, and a pie chart. At the bottom are 'New' and 'Details' buttons.



The Expense entry form has a title bar 'Expense' and a dropdown 'Family'. It shows a date filter '01 Aug 04' and a category filter 'Meal'. The form has fields for 'Item: Dinner', 'Amount: 300', 'To: HiHi Restaurant', 'Payment: Cash', and 'Desc:'. At the bottom are 'OK' and 'Delete' buttons.



The Amount input dialog has a title bar 'Amount' and a dropdown 'Family'. It shows a date filter '01 Aug 04' and a category filter 'Meal'. The dialog has a numeric keypad with digits 0-9, a decimal point, and buttons for '+', '-', 'x', '/', and 'C'. At the bottom are 'OK' and 'Cancel' buttons.



The HiMoney main screen shows a filter dropdown with 'Expense' and 'Income' options. To the right is 'Total: \$ 330.00'. Below the filter are icons for a list, a bar chart, and a pie chart. At the bottom are 'New' and 'Details' buttons.

TIPS We do not support the character (') in the Item, To and From. Please do not use it or it will prompt error.

In the edit screen, if you click the Menu, you can choose in **Record**

- i. add *New* record
- ii. *Duplicate* the current record
- iii. *Beam* the record to another Palm with HiMoney
- iv. *Print* the record to the IR Printer if your have the 3rd Party Tool PalmPrint. If you do not have this product, you can try and download it from <http://www.stevenscreek.com/palm/>.

Record	Edit	Options
New	Duplicate	Transport
Beam		
Print		
To: Taxi Driver		
Payment: Cash		
Desc:		
OK Delete		

Weekly and Monthly Summary

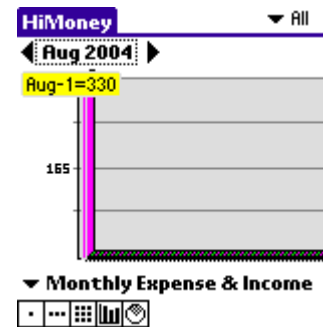
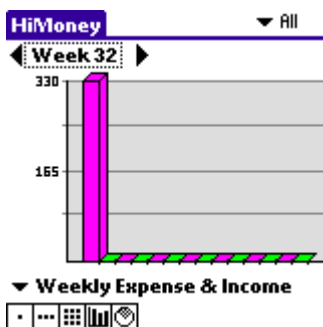
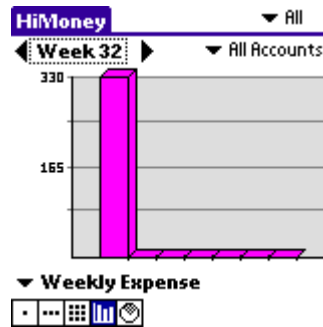
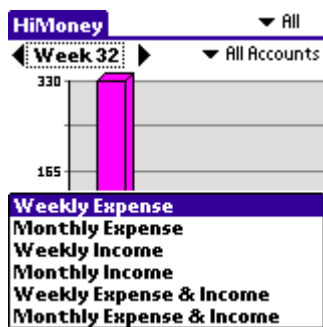
You can view the overview of financial status by Weekly or Monthly Summary.

HiMoney			▼ All
Week 32			
	Income	Expense	
S 01 Aug	\$0.00	\$330.00	
M 02 Aug	\$0.00	\$0.00	
T 03 Aug	\$0.00	\$0.00	
W 04 Aug	\$0.00	\$0.00	
T 05 Aug	\$0.00	\$0.00	
F 06 Aug	\$0.00	\$0.00	
S 07 Aug	\$0.00	\$0.00	
Total:	\$0.00	\$330.00	

HiMoney			▼ All
Aug 2004			
	Income	Expense	
S 01 Aug	\$0.00	\$330.00	
M 02 Aug	\$0.00	\$0.00	
T 03 Aug	\$0.00	\$0.00	
W 04 Aug	\$0.00	\$0.00	
T 05 Aug	\$0.00	\$0.00	
F 06 Aug	\$0.00	\$0.00	
S 07 Aug	\$0.00	\$0.00	
S 08 Aug	\$0.00	\$0.00	
Total:	\$0.00	\$330.00	

3D Bar Charts

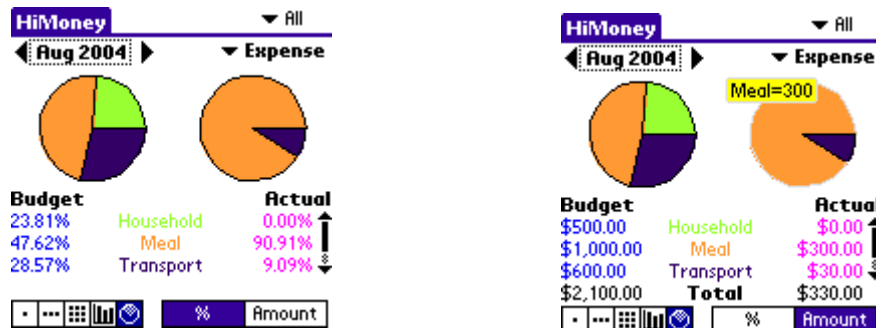
We provide six Chart Report for you to analysis your Expense and Income status by week or month. For Expense only or Income only reports, you can filter by both Categories and Accounts. For Expense and Income combined report, you can filter by the category.



Budget vs Actual

You can compare the budget against monthly expense / income record in the Pie chart as shown. The data can be viewed as Percentage or Amount, and you can filter it by category.

TIPS The color of the Pie chart is configured in the Account Setup.



Icons of the Account

Inside the HiMoney package, you will find the icon set sanwaicons.prc. Besides this, we support the icon sets of Datebk5 and Handysopper. You can click the Icon DB to select if it has been installed.

TIPS If you search the Internet, you may find free icon set for Datebk5 and Handysopper.

TIPS You can use 3rd party free utility Icon Manager to manager your icon.

History

Version 1.0

Initial Release of HiMoney

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