

iMoney 2 Getting Started

Version for Windows, Mac, Linux

We Believe:

Enjoy Money Enjoy Life – Happiness is a choice, money cannot buy happiness, but we can use our money to choose happiness.

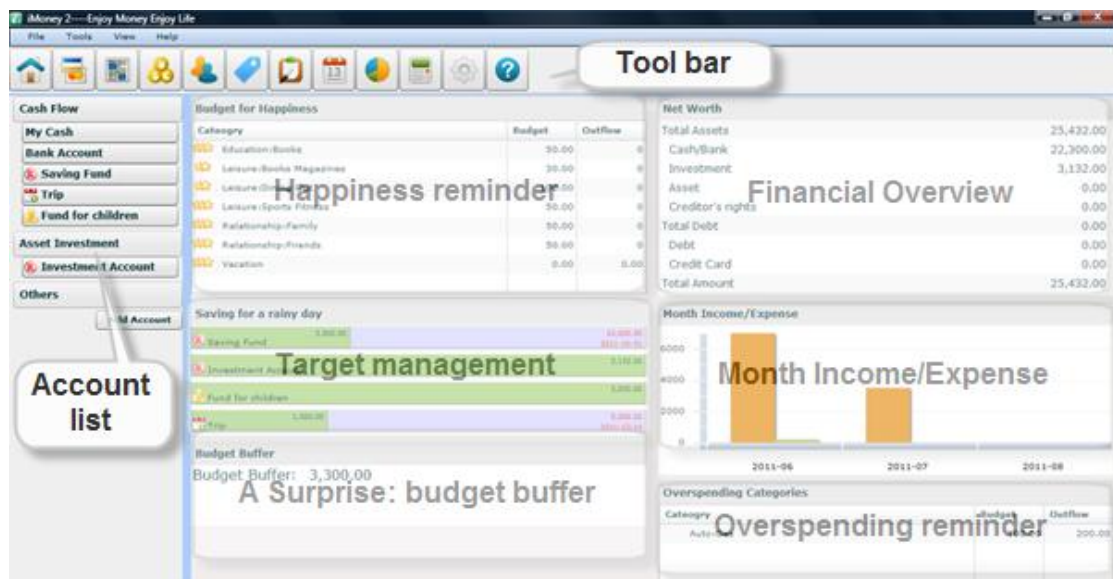
Thank you for choosing iMoney!

This tutorial helps you get started with iMoney to Enjoy Money as quickly as possible. You will learn:

- iMoney overview.
- Find your happiness.
- Budget for happiness.
- Add and edit transactions

iMoney overview

The Home tab is a dashboard where you can track your finances and stay on top of your bills.



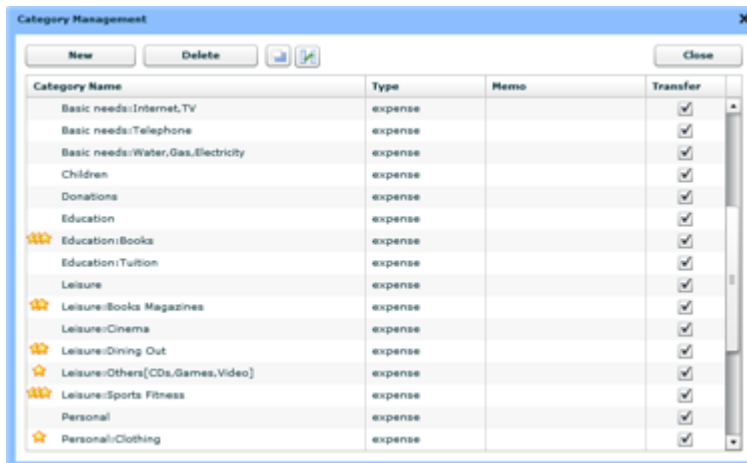
Find your happiness

iMoney is a personal financial tool with four Enjoy Money rules. The first one is Budget for Happiness. To do this, you need: Question Your Needs and Wants, to find your happiness.

What do you want? What do you really need? Evaluate your current financial situation. Take a look at the big picture.

iMoney has more than 30 predefined spending categories to help you complete yourself categories.

1. Click the **Category Management** button in the toolbar.



2. Add and edit the category to match yourself.
3. Rate categories with **Star** (0, 1, 2, 3 star).

Items	Stars
Basic Needs	★ No star, 1 star
Happiness, trip, etc	★★ 2,3 stars
Skills, Education, etc	★★★ 3 stars

Budget for happiness

Now you have found your happiness, the way to let your happiness come to truth is to build a budget.



Build a budget is very easy with iMoney.

1. Set up your first account.
Before you can enter any transaction you need an account.
Click the **Add Account** Button at the left of the window.

Create a New Account [X]

Account Type
 Cash [v] Saving Account

Account Name
 New Account

Currency
 United States Dollar (USD) [v]

Ending Balance
 0 Don't worry: You can make changes to your account later.

Date of Balance
 08/16/2011 [calendar]

Memo
 [text area]

[Done] [Cancel]

2. Add income to budget income pool.

My Account									
[New] [Reconcile] [Del]									
C	Date	Payee	Category	Outflow	Inflow	Tag	B	Memo	CheckNum
C	08/07/2011		[Income]Salary		3,500.00		07		
U	08/16/2011		[Expense]Vacation				08		
			[Income]Salary						
			Misc						
			Transfer						
			Transfer for saving						
			Transfer for budget						
			Transfer for Investment						
			Borrow						
			Lend						
			Payment						
			GetBack						
			Interest						
			Opening Balance						

Enter the account register.

Add an income transaction to the account.

You can change the budget month of a transaction, so that you can use the money you earned last month, or an expense use last month budget. [Prepayment or After payment]

3. Budget money to the basic needs.

Basic needs are the things you can't go without and include: Housing, food, clothing, transportation, etc. So you budget enough money for them firstly.

4. then budget as much money as you can on your happiness

Enjoy your money so you can enjoy your life.

Add and edit transactions

To record a new transaction in iMoney, select an account in the account list then click the latest record in the account register. Click the specific field you wish to edit and type or select the information you want. Click save button or Click other record to exit the edit mode.

For more information

There are many more features throughout the program to help you enjoy your money.

Complete financial picture: iMoney can not only support cash account but also asset, investment, debt even business account. You can get a full picture of your financial, so you can control your money and control your life.

Manage your investments: You can add Investment Account to iMoney and track your investment performance easily.

Track your business: If you own a business, you can track your income and expenses and performance with iMoney Business Accounts. If you have a rental business, you can keep track of your properties with iMoney Asset Accounts.

Target management: If you have saving plans or saving for big bills, children, you can add a Saving Account to tracking all these for you.

Reminders: iMoney has three reminders, Happiness reminder, Payments reminder, Overspending reminders to help you to enjoy your money.

Get help when you need it

We hope the Quick Start Guide has helped you understand the basics of iMoney! If after reading this guide you have questions, you can turn to the following resources.

Help Documentation: <http://www.imoneysoft.com/support.html>

More questions? Just ask support@imoneysoft.com