

MyBudgets

1.0 - Overview

MyBudgets is not for millionaires. Millionaires don't need to budget. Normal people do.

This program makes it very easy to produce household budgets. (Editorial comment: The author is a "Budget Maniac" and believes that doing so is the best way to manage your finances, get bills paid off, and save for the future. At any given time, the author always has budgets created for every pay period for the subsequent twelve months. This led to the creation of this program.

Once you have used the Configuration Menus to customize MyBudgets to fit your situation (days of the month that you are paid, your monthly bills and estimated expenditures, etc.), you are ready to begin creating budgets for your upcoming pay periods. The Display screen has many features and it displays your Income in the top portion of the display and your Expenditures in the bottom portion and shows a running remaining balance based upon total income and your configured expenditures.

Two very time saving features are the ability to just select checkboxes for the monthly bills (that you created in the Configuration Menus) for a new budget and the use of Templates. Templates are a powerful feature that allow you to create budgets for upcoming pay periods using just one click.

There are countless ways to use the reporting and searching tools to review both past and future budgets in order to see your expenditures in the past and/or how much you are planning to pay in the future. And ... much more!

This program allows for, in fact, two different 'users' so that each user in a household could (if so chosen) maintain budgets separately. I imagine most households will only use the first user.

The purpose of MyBudgets is twofold. First, it is used to project and produce budgets for upcoming paydays and secondly, it is to be used on payday itself to make sure that you are remembering to pay each bill as you have scheduled in order to meet your financial goals.

2.0 – System Requirements

This is a Windows program and the following environments are supported:

- Windows 7 (.NET Framework 4.5 and later)
- Windows 8
- Windows 10

3.0 – Installation

Unzip **MyBudgetsSetup.zip** and simply run **MyBudgetsSetup.exe**. Just follow the “bouncing ball” hitting Next and Finish.

3.1 – Files needed for MyBudgets

Only two files are needed for MyBudgets and they must be in the same directory/folder.

They are:

- MyBudgets.exe (The executable program)
- VBBudgets.mdb (Your database)

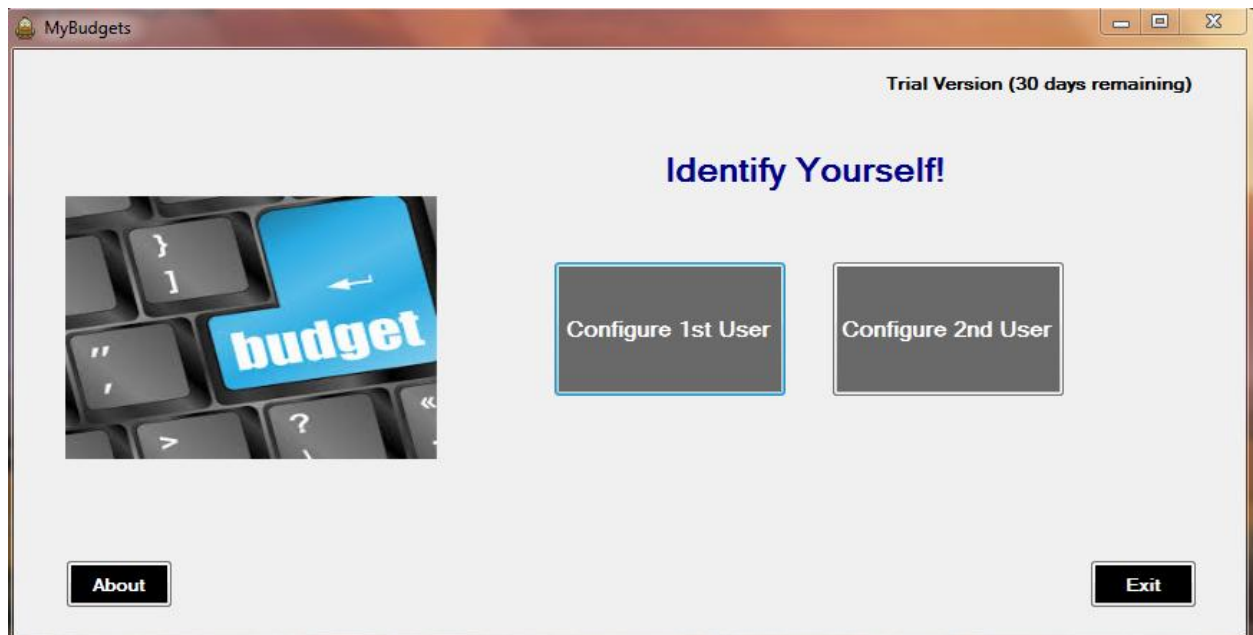
4.0 – Getting started

Before you begin creating new budgets, you need to do two things:

- Create your first user (and second user, if desired)
- Tell MyBudgets what your pay periods are

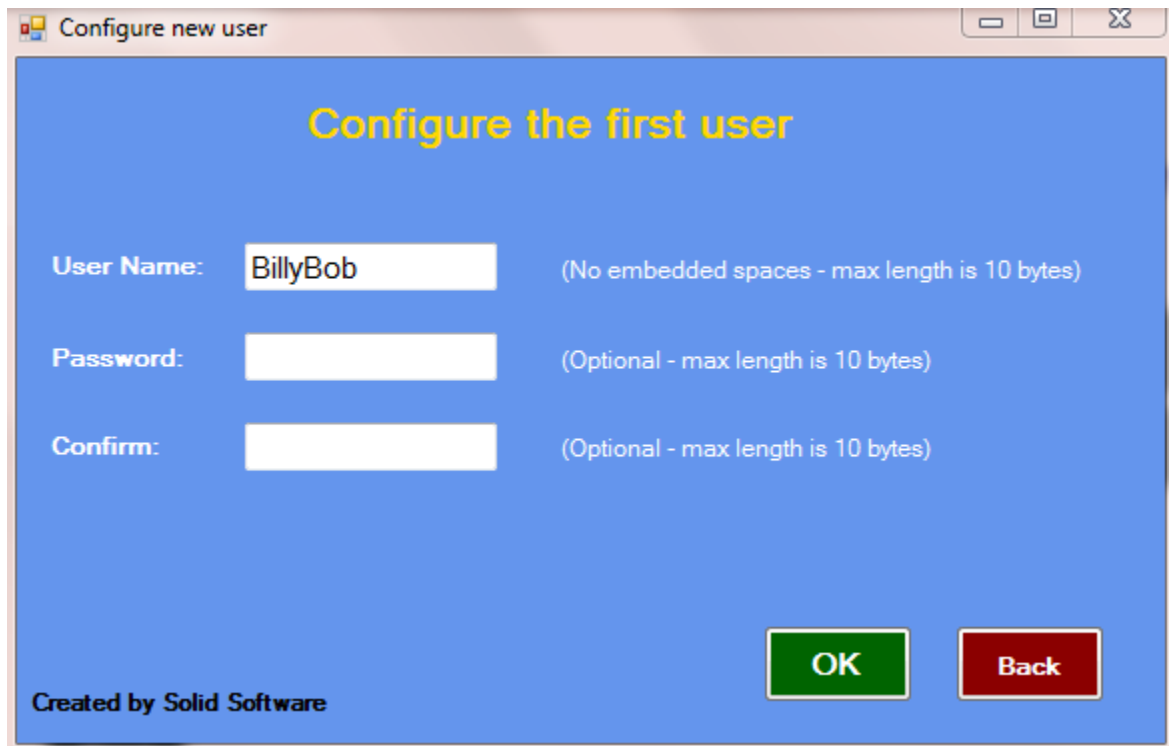
4.1 – Create new user

When you run MyBudgets for the first time, the screen shown below will be displayed:



Click on **"Configure 1st User"**

The following screen will then be displayed:



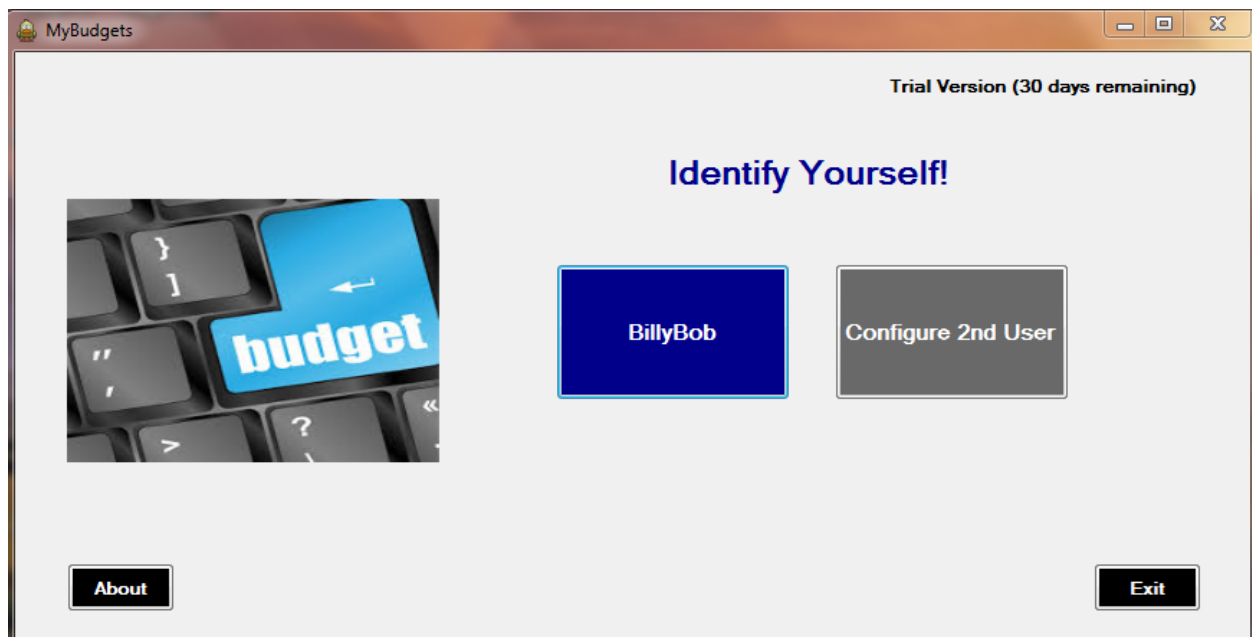
A dialog box titled "Configure new user" with a blue background. The title bar shows standard window controls. The main content area has the heading "Configure the first user" in yellow. Below this, there are three input fields: "User Name:" with the text "BillyBob", "Password:", and "Confirm:". Each field has a corresponding note: "(No embedded spaces - max length is 10 bytes)" for the name, and "(Optional - max length is 10 bytes)" for the password and confirm fields. At the bottom right, there are two buttons: a green "OK" button and a red "Back" button. At the bottom left, it says "Created by Solid Software".

In this documentation, we are pretending that the user is "BillyBob" 😊

Optionally (although I imagine it would be rare), you can password protect each user so that a password is required when attempting to view the budgets for that user.

When the User Name (and optional password is entered), press the OK button.

The following screen will then be displayed: (with the button enabled and named as "BillyBob", for example)



A window titled "MyBudgets" with a light gray background. The title bar shows standard window controls. In the top right corner, it says "Trial Version (30 days remaining)". The main content area has the heading "Identify Yourself!" in blue. On the left, there is an image of a keyboard with a blue key that says "budget". To the right of the image, there are two buttons: a blue button labeled "BillyBob" and a gray button labeled "Configure 2nd User". At the bottom left, there is a black button labeled "About". At the bottom right, there is a black button labeled "Exit".

Click on your User (in this case, "BillyBob") and the following screen will be displayed:



4.2 – Create your pay periods

Click on the blue Configuration button.

The following screen will be displayed:



Click on the **Pay Periods** button

The following screen will be displayed:

The screenshot shows a window titled "Configuration of Pay Periods" with a blue background. At the top, the name "BillyBob" is displayed. Below it, a green message states: "You may configure up to 7 pay periods for a month". There are seven input fields labeled "Pay Period #1:" through "Pay Period #7:". The first two fields contain "15th of the month" and "Last day of the month" respectively. To the right of these fields are example text strings: "(e.g. 15th of the month)" for the first and "(e.g. Last day of the month)" for the second. The third field has an example "(e.g. 2nd Wednesday of the month)". At the bottom right are "OK" and "Cancel" buttons.

Pay Period #	Configuration	Example
Pay Period #1:	15th of the month	(e.g. 15th of the month)
Pay Period #2:	Last day of the month	(e.g. Last day of the month)
Pay Period #3:		(e.g. 2nd Wednesday of the month)
Pay Period #4:		
Pay Period #5:		
Pay Period #6:		
Pay Period #7:		

In the case of "BillyBob", we are assuming that he is always paid each month as follows:

- On the 15th of the month
- On the Last day of the month

Most likely, your case is different. This program supports up to 7 pay periods per month.

Other example/possible scenarios:

- 1st Friday of the month
- 2nd Friday of the month
- 3rd Friday of the month
- 4th Friday of the month

OR

- 1st paycheck of the month
- 2nd paycheck of the month

OR

- Monthly paycheck (if paid monthly)

MyBudgets will use this configuration information (your pay periods) extensively throughout its menus.

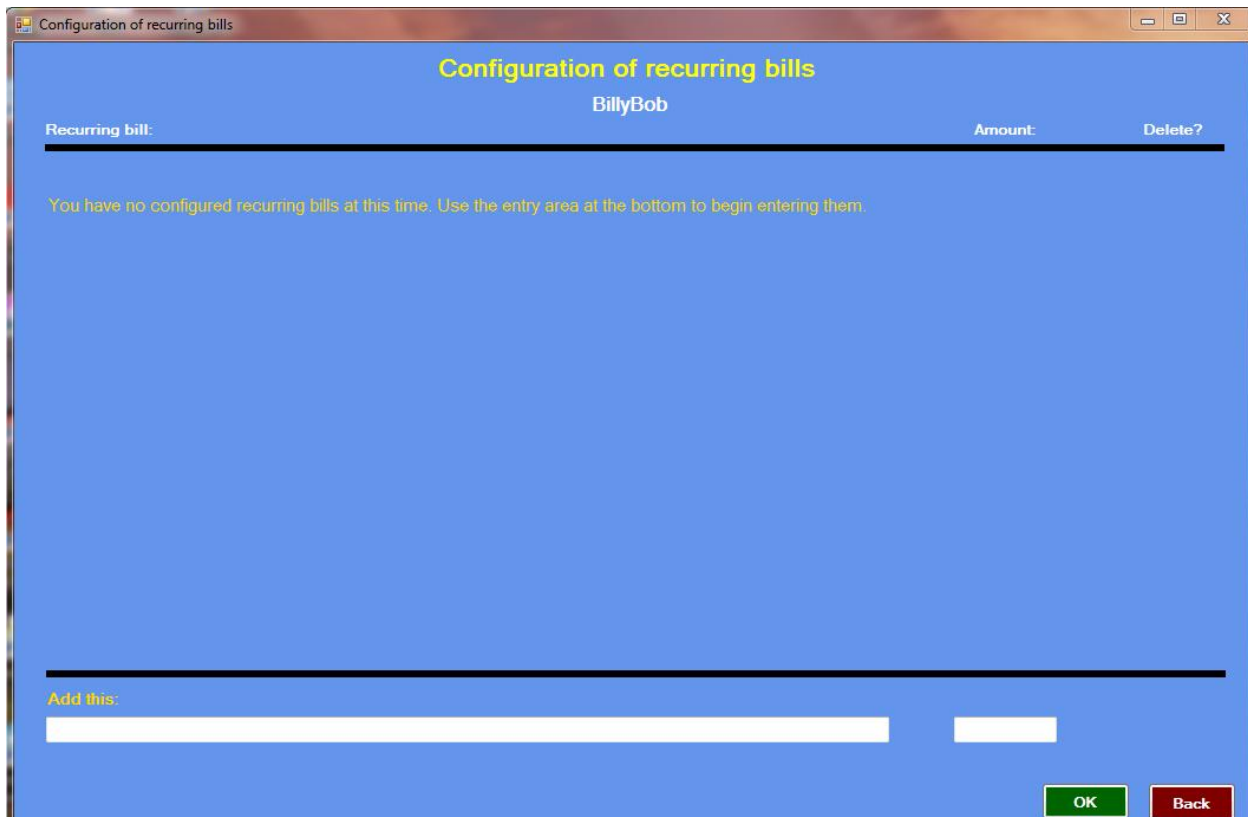
Click **OK** when you have entered your pay periods.

5.0 – Recurring Bills (in Configuration Menus)

You do **NOT** need to enter your **Recurring Bills** during the initial configuration and, in fact, you could use **MyBudgets** and **never** enter any information in the Recurring Bills section in the Configuration Menus if you so choose.

However, it will make creating new budgets much easier and save lots of time for you if you **do** enter your Recurring Bills. (Some might say, however, that if you make good use of Templates (discussed later in this document), then possibly you don't necessarily need to enter your Recurring Bills in the Configuration Menus because Templates will accomplish a similar objective.)

After clicking Recurring Bills on the Configuration Menu, the following screen will be displayed:



The screenshot shows a window titled "Configuration of recurring bills" with a blue background. At the top, the title "Configuration of recurring bills" is in yellow, and "BillyBob" is centered below it. Below this is a table header with three columns: "Recurring bill:", "Amount:", and "Delete?". The table body is empty, and a message in yellow text states: "You have no configured recurring bills at this time. Use the entry area at the bottom to begin entering them." At the bottom, there is an "Add this:" label followed by two input fields. In the bottom right corner, there are two buttons: "OK" (green) and "Back" (red).

Note that the display is telling you that you don't have any Recurring Bills configured at this time.

Your Mission here (should you accept it, Mr. Phelps 😊) is to enter (up to 14) monthly bills with their amounts (estimate, if needed). These should be **recurring bills** – bills that you incur each and every month. (e.g. House payment, groceries, cable bill, phone bill, Car Insurance, auto loan, power bill, etc.)

An example for BillyBob is shown on the following page:

Configuration of recurring bills

Configuration of recurring bills

BillyBob

Recurring bill:	Amount:	Delete?
A-Groceries	200	<input type="checkbox"/>
Cell phone bill	155	<input type="checkbox"/>
Comcast	125	<input type="checkbox"/>
Farmers Insurance (auto insurance)	188	<input type="checkbox"/>
House payment	1500	<input type="checkbox"/>
Netflix	11	<input type="checkbox"/>
New York Life	160	<input type="checkbox"/>
Pet food	85	<input type="checkbox"/>
Puget Sound Energy	251	<input type="checkbox"/>
Truck payment	450	<input type="checkbox"/>
Water bill	33	<input type="checkbox"/>

Add this:

The kewl (sic) thing about configuring these recurring bills is that when you click on the **Add Expense** button (discussed later in this documentation), you don't have to enter the information. All you have to do is to click a checkbox to its left and you can add this expense to the selected budget for the pay period. In fact, you could click one, many, or all of the checkboxes and each one of the recurring bills will be added to the budget.

When finished entering all of your recurring bills, click the OK button.

(**MyBudgets** will automatically sort the descriptions of the recurring bills and display them alphabetically)

We will discuss **Templates** later. I want to get you going on creating your first budget.

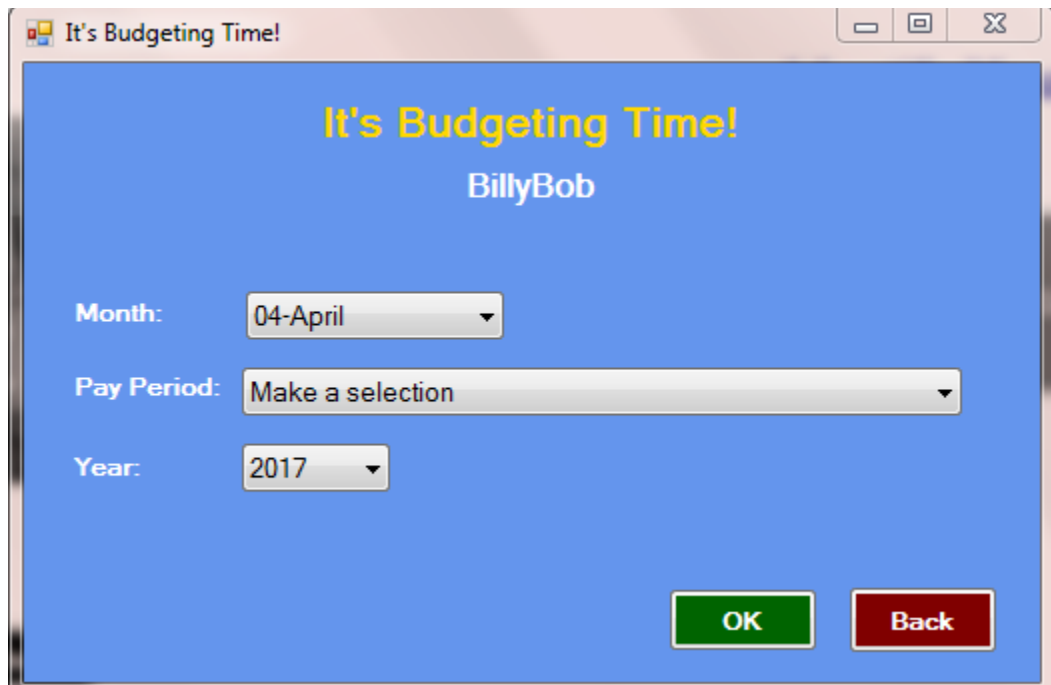
6.0 – Creating your first budget

Return to the Main Budgeting Menu shown below:



Click the green **It's Budgeting Time!** button.

The following screen is displayed:



To make things easier/faster for you, **MyBudgets** will automatically set the Month and Year to the current Month and Year (and, obviously, you can change them to any pay period that you so desireth)

Select the Budget (Month, Pay Period, Year) that you want to work with and click the **OK** button.

The following screen will be displayed:

I thought that it would help if I showed a non-blank closer-to-real-life budget (Remember that saying about, “A Picture Is Worth a 1,000 Words”

The screenshot shows a software window titled "It's Budgeting Time!". The main header area is blue and contains the text "Pay period for April of 2017 (15th of the month)" in yellow, the name "BillyBob" in white, and two buttons: "Load from Template" (green) and "Clear this budget" (black). Below this, the "Income:" section features a table with columns "Source of Income" and "Amount". It lists "Payroll check" with an amount of 2,800 and a "Total" of 2,800. Below the table are three buttons: "Add Income record" (green), "Change Income record" (grey), and "Delete Income record" (grey). The "Expenses:" section features a table with columns "Expense", "Status", and "Amount". It lists various expenses: A-Groceries (200), Cell phone bill (155), Comcast (125), House payment (1,500), Petfood (85), Truck payment (450), and Z-Remaining (285, Status N/A). The "Total" is 2,800 (Status N/A). Below the table are four buttons: "Add Expense Record" (green), "Change Expense record" (grey), "Delete Expense record" (grey), and a red "Back" button.

Source of Income	Amount
Payroll check	2,800
Total	2,800

Expense	Status	Amount
A-Groceries		200
Cell phone bill		155
Comcast		125
House payment		1,500
Petfood		85
Truck payment		450
Z-Remaining	N/A	285
Total	N/A	2,800

There are many buttons on this screen.

The first thing to note is that it is broken up in two sections – The **Income** grid and the **Expenses** grid.

Three lines/records are computed by **MyBudgets** and you cannot change them. They are:

- The **Total** in the **Income** grid
- The **Total** in the **Expenses** grid
- The **Z-Remaining** line in the **Expenses** grid

All other descriptions and amounts you have total control over.

At any given time, some of the buttons will be “greyed-out”. They will “light up” and be enabled based upon your clicking in the Income and Expenses grid.

For now, recognize that there are two very powerful buttons near the top right called “**Load from Template**” and “**Clear this budget**”

6.1 – Creating/Updating a budget

First, and foremost, this budgeting screen makes extensive use of your mouse.

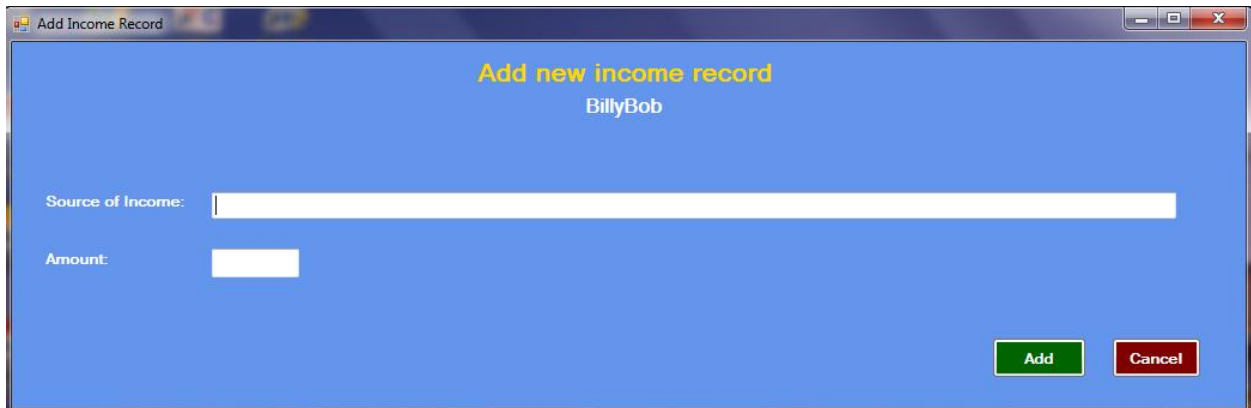
There are two “clicks” that initiate the creation/updating of fields within the budget grids (Income and Expenses)

They are:

- A double-click (which is used to initiate changing just one field)
- A single-click on the little triangle to the left of each record/line (used for changing more than one field or for deleting a record)

6.2 – Income – Add new Income record

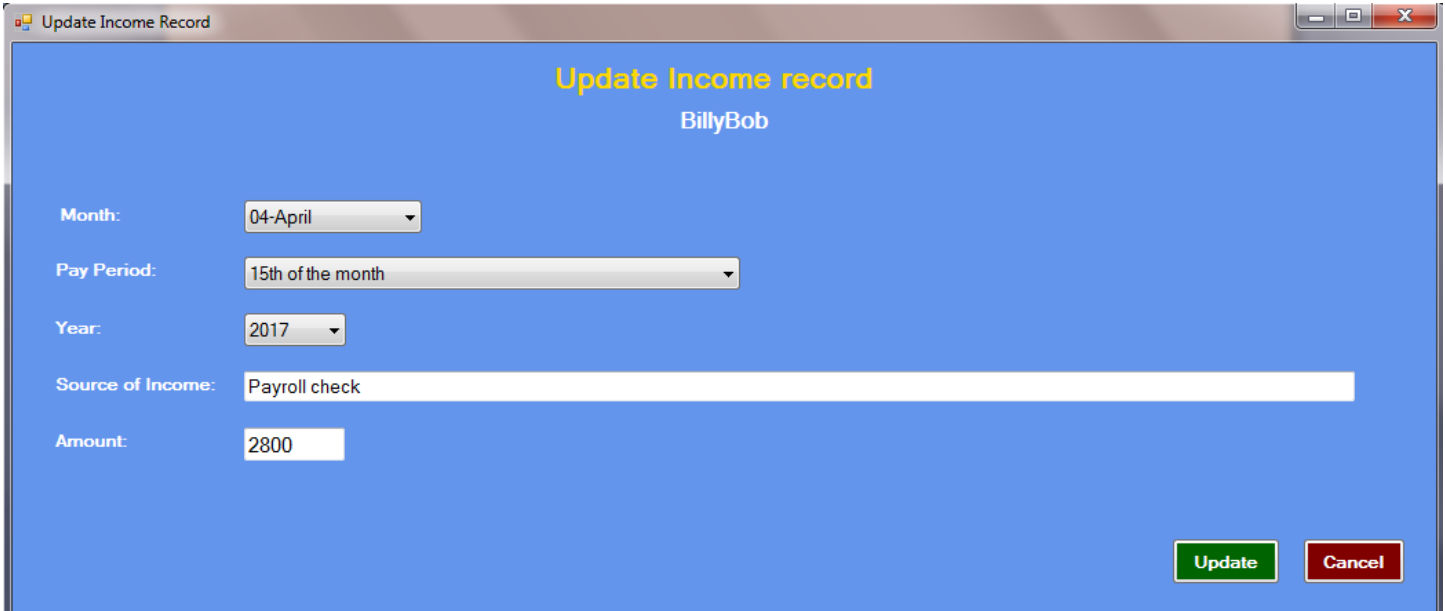
Click on the **Add Income Record** button and the following screen will be displayed:

A screenshot of a software window titled "Add Income Record". The window has a blue background. At the top center, the text "Add new income record" is displayed in yellow, with "BillyBob" in white below it. On the left side, there are two labels: "Source of Income:" followed by a long white text input field, and "Amount:" followed by a shorter white text input field. In the bottom right corner, there are two buttons: a green "Add" button and a red "Cancel" button. The window has standard Windows-style title bar controls (minimize, maximize, close) in the top right corner.

Simply enter the Source of the Income and the amount and click on the **Add** button

6.3 – Income – Changing any of the five fields of an Income record

Click on the little triangle to the left of the Income record to update so that the entire line is selected and this will “light up” the **Change Income Record** button. Click on this button and the following screen will be displayed:



The screenshot shows a window titled "Update Income Record" with a blue background. At the top, the text "Update Income record" is displayed in yellow, and "BillyBob" is displayed in white. Below this, there are five input fields arranged vertically on the left side of the window:

- Month:** A dropdown menu showing "04-April".
- Pay Period:** A dropdown menu showing "15th of the month".
- Year:** A dropdown menu showing "2017".
- Source of Income:** A text input field containing "Payroll check".
- Amount:** A text input field containing "2800".

At the bottom right of the window, there are two buttons: a green "Update" button and a red "Cancel" button.

Any and all of the fields are “fair game” for changing. Notice that this also allows you to change the Month, Pay Period and Year and configure this Income record for a completely different budget. When done making changes, click on the **Update** button.

6.4 – Income – Deleting an Income record

Click on the little triangle to the left of the Income record to delete so that the entire line is selected and this will “light up” the **Delete Income Record** button. Click on this button and the following screen will be displayed:

The screenshot shows the 'It's Budgeting Time!' application window. The title bar says 'It's Budgeting Time!'. The main window has a blue header with the text 'Pay period for April of 2017 (15th of the month)' and 'BillyBob'. There are two buttons in the top right: 'Load from Template' and 'Clear this budget'. Below the header, there are two sections: 'Income:' and 'Expenses:'. The 'Income:' section has a table with two columns: 'Source of Income' and 'Amount'. The table has two rows: 'Payroll check' with an amount of 2,800 and 'Total' with an amount of 2,800. The 'Expenses:' section has a table with three columns: 'Expense', 'Status', and 'Amount'. The table has eight rows: 'A-Groceries' (200), 'Cell phone bill' (155), 'Comcast' (Paid, 125), 'House payment' (1,500), 'Petfood' (85), 'Truck payment' (450), 'Z-Remaining' (N/A, 285), and 'Total' (N/A, 2,800). In the center of the screen, there is a dialog box titled 'Delete Budget record' with the text 'Are you sure you want to remove this budget record?' and two buttons: 'Yes' and 'No'. At the bottom of the application window, there are four buttons: 'Add Income record', 'Add Expense Record', 'Change Expense record', and 'Delete Expense record'. There is also a 'Back' button in the bottom right corner.

Click **Yes** to delete the record else click **No** if you have changed your mind. (You know, as women often do! 😊)

6.5– Income – Updating just the Source of Income record

Double-click on the cell containing the Source of Income and the following screen will be displayed:

The screenshot shows the 'Update Description' application window. The title bar says 'Update Description'. The main window has a blue header with the text 'Update Income Description' and 'BillyBob'. Below the header, there is a text input field labeled 'Source of Income:' with the text 'Payroll check' entered. At the bottom right of the application window, there are two buttons: 'Update' and 'Cancel'.

Update the Source of Income as desired and click on the **Update** button

6.6– Income – Updating just the amount of an Income record

Double-click on the cell containing the Income Amount and the following screen will be displayed

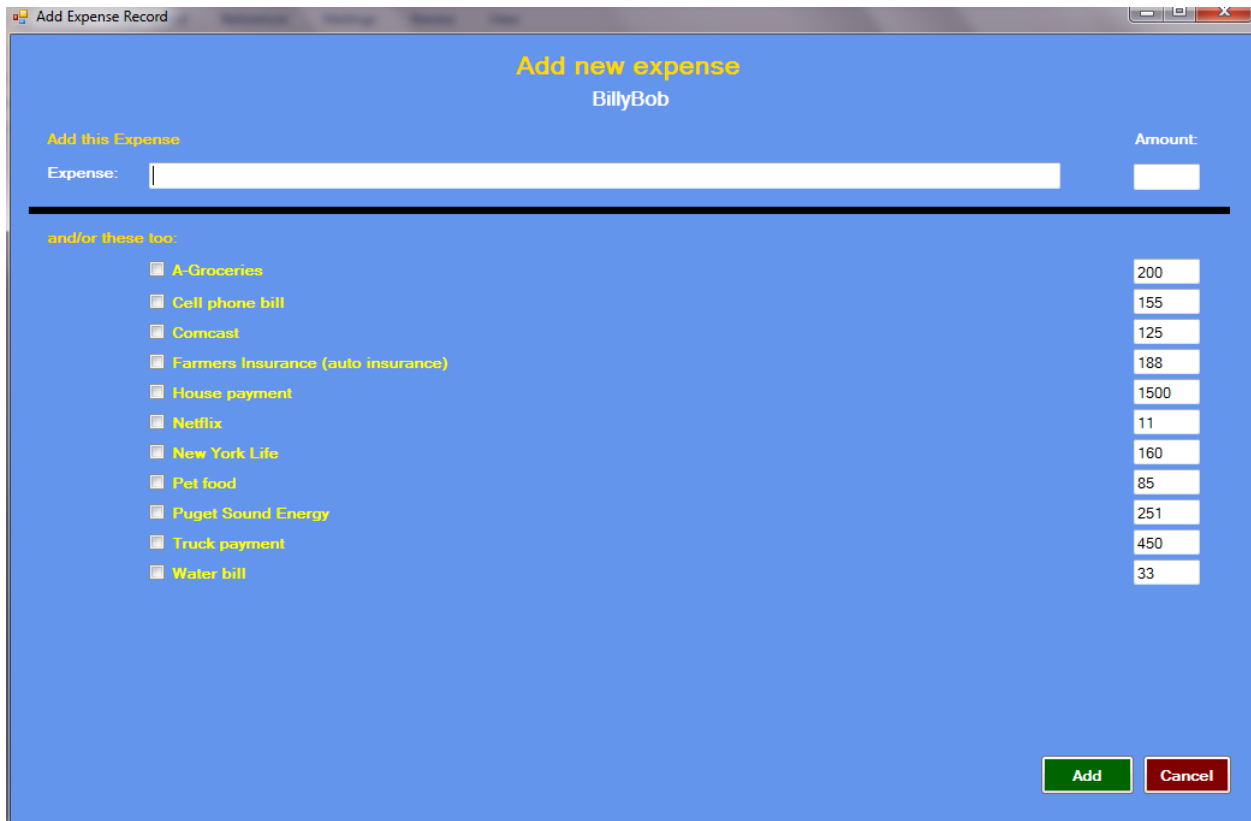


The dialog box is titled "Update Budget Amount" and has a blue background. It displays "Update Income Amount" in yellow text and "BillyBob" in white text. Below this, it says "Income Amount:" followed by a text input field containing "2800". At the bottom, there are two buttons: a green "Update" button and a red "Cancel" button.

Update the Income Amount as desired and click on the **Update** button

7.1 – Expense – Add new Expense record

Click on the **Add Expense Record** button and the following screen will be displayed: (for BillyBob)



The dialog box is titled "Add Expense Record" and has a blue background. It displays "Add new expense" in yellow text and "BillyBob" in white text. Below this, it says "Add this Expense" and "Amount:". There is a text input field for "Expense:" and a text input field for "Amount:". Below a horizontal line, it says "and/or these too:". There is a list of expenses with checkboxes and corresponding amounts in input fields:

Expense	Amount
<input type="checkbox"/> A-Groceries	200
<input type="checkbox"/> Cell phone bill	155
<input type="checkbox"/> Comcast	125
<input type="checkbox"/> Farmers Insurance (auto insurance)	188
<input type="checkbox"/> House payment	1500
<input type="checkbox"/> Netflix	11
<input type="checkbox"/> New York Life	160
<input type="checkbox"/> Pet food	85
<input type="checkbox"/> Puget Sound Energy	251
<input type="checkbox"/> Truck payment	450
<input type="checkbox"/> Water bill	33

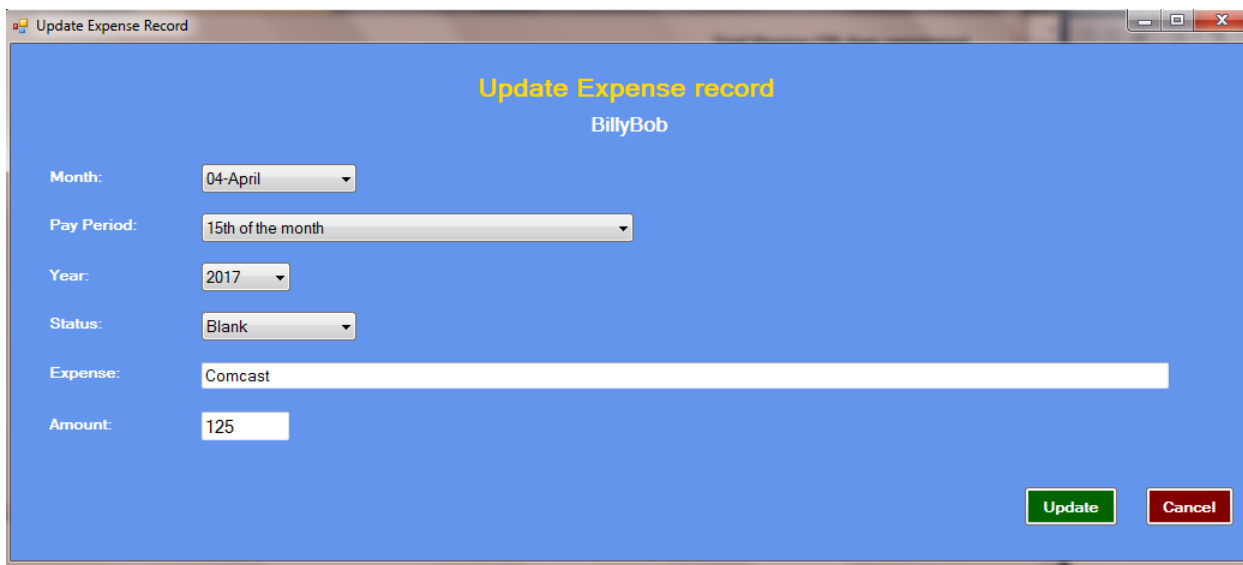
At the bottom right, there are two buttons: a green "Add" button and a red "Cancel" button.

As you can see, this is where the configuration of **Recurring Bills** can help. All of the entries that you created in the Recurring Bills section of the Configuration Menus are shown here and you can simply click their checkboxes if you want them added to the current budget. If any of the amounts need changing, then simply overtype the configured amounts with a new amount. If you want to simply enter a new or one-time expense that is not shown in the recurring bills below, then enter the expense description and amount at the top of this screen and don't click any of the checkboxes.

When done, click the **Add** button.

7.2 – Expense – Changing any of the six fields of an Expense record

Click on the little triangle to the left of the Expense record to update so that the entire line is selected and this will “light up” the **Change Expense Record** button. Click on this button and the following screen will be displayed:



The screenshot shows a window titled "Update Expense Record" with a blue background. At the top, the text "Update Expense record" is displayed in yellow, and "BillyBob" is shown below it. The form contains the following fields:

- Month:** A dropdown menu showing "04-April".
- Pay Period:** A dropdown menu showing "15th of the month".
- Year:** A dropdown menu showing "2017".
- Status:** A dropdown menu showing "Blank".
- Expense:** A text input field containing "Comcast".
- Amount:** A text input field containing "125".

At the bottom right, there are two buttons: a green "Update" button and a red "Cancel" button.

Any of the fields are “fair game” for changing. Notice that this also allows you to change the Month, Pay Period and Year and configure this expense for a completely different budget. When done making changes, click on the **Update** button.

7.3 – Expense – Deleting an Expense record

Click on the little triangle to the left of the expense record to delete so that the entire line is selected and this will “light up” the **Delete Expense Record** button. Click on this button and the following screen will be displayed:

The screenshot shows the 'It's Budgeting Time!' application window. The title bar says 'It's Budgeting Time!'. The main window has a blue header with the text 'Pay period for April of 2017 (15th of the month)' and 'BillyBob'. There are two buttons in the top right: 'Load from Template' and 'Clear this budget'. Below the header, there are two sections: 'Income:' and 'Expenses:'. The 'Income:' section has a table with columns 'Source of Income' and 'Amount'. It contains one row 'Payroll check' with an amount of 2,800, and a 'Total' row with an amount of 2,800. The 'Expenses:' section has a table with columns 'Expense', 'Status', and 'Amount'. It contains several rows: 'A-Groceries' (200), 'Cell phone bill' (155), 'Comcast' (125), 'House payment' (1,500), 'Pet food' (85), 'Truck payment' (450), 'Z-Remaining' (N/A, 285), and 'Total' (N/A, 2,800). A dialog box titled 'Delete Budget record' is open in the center, asking 'Are you sure you want to remove this budget record?' with 'Yes' and 'No' buttons. At the bottom of the application window, there are four buttons: 'Add Income record', 'Add Expense Record', 'Change Expense record', and 'Delete Expense record'. There is also a 'Back' button.

Click **Yes** to delete the record else click **No** if you have changed your mind.

7.4 – Expense – Updating just the description of an Expense record

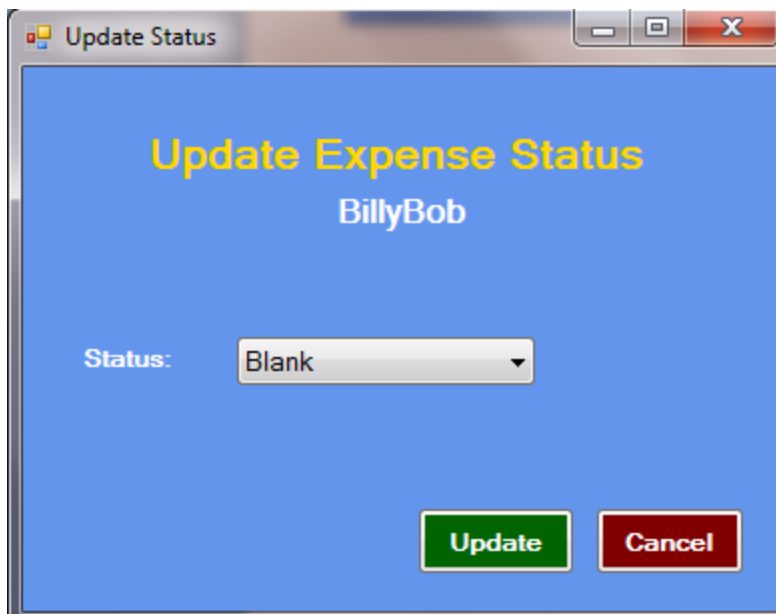
Double-click on the cell containing the Expense description and the following screen will be displayed:

The screenshot shows the 'Update Description' dialog box. The title bar says 'Update Description'. The main window has a blue header with the text 'Update Expense Description' and 'BillyBob'. Below the header, there is a text input field labeled 'Expense Description:' containing the text 'Cell phone bill'. At the bottom right, there are two buttons: 'Update' and 'Cancel'.

Update the expense description as desired and click on the **Update** button

7.5 – Expense – Updating the Status of an Expense record

Double-click on the cell containing the Status and the following screen will be displayed:



The possible selections in the pull-down menu are as follows:

- Blank
- N/A
- Waiting for bill
- Check written
- Paid

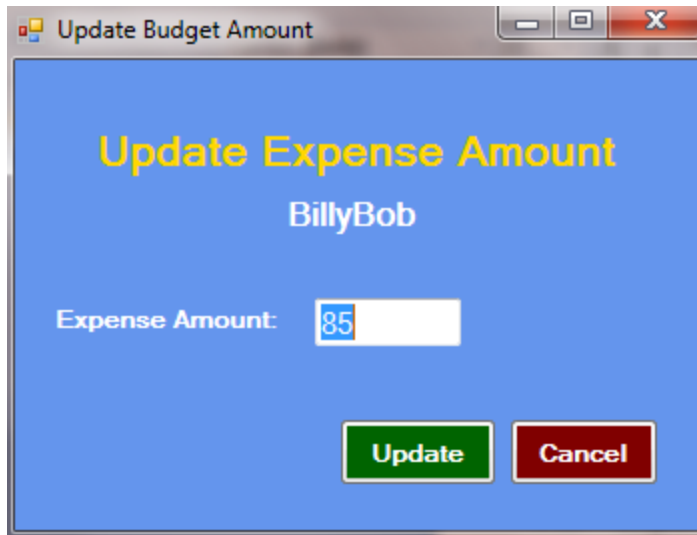
With the exception of the “Z-Remaining” line whose Status is set to “**N/A**” the values of the status field for all **new** budget records is blank.

When it is payday, the objective is to select the appropriate budget (Month, Pay period, Year) and update the Status of each budget expenditure as you pay that bill (either by writing checks or paying online). The obvious goal is to get the Status of every expenditure line to say “**Paid**”. However, maybe the bill for the expenditure has not yet arrived in your mailbox. This is why you might set the status for that expenditure to “**Waiting for bill**”. Or (if you are a “fan” of the “**Envelope Method**” (as I am), maybe you have written a check to the payee and placed it in an envelope waiting for the bill to arrive in the mailbox and this is why you might set the status to “**Check written**”.

When you have selected the Status of your choice, click on the **Update** button.

7.6 – Expense – Updating just the amount of an Expense record

Double-click on the cell containing the Expense Amount and the following screen will be displayed:



Update the expense Amount as desired and click on the **Update** button

8.0 – Clear this budget

Scary option. 😊

If you want to completely empty out a Budget (Month, Pay period, Year), then this is the option for you! (Alternatively you could use the **Delete Income Record** and **Delete Expense Record** buttons and delete each line individually. But, why?

So ... as long as we are pretending, this is what the April 15, 2017 budget would look like if we used the **Clear this budget** button:

It's Budgeting Time!

Pay period for April of 2017 (15th of the month)

BillyBob

Load from Template

Clear this budget

Income:

Source of Income	Amount
Total	0

Add Income record

Change Income record

Delete Income record

Expenses:

Expense	Status	Amount
Z-Remaining	N/A	0
Total	N/A	0

Add Expense Record

Change Expense record

Delete Expense record

Back

In other words, the Budget is set to the same state that it would the very first time you selected that budget.

8.1 – Load from Template

This is a very powerful button.

Consult/Reference documentation below on how to create the Templates. In the Configuration Menu, you would create a Template for each of your Pay Periods.

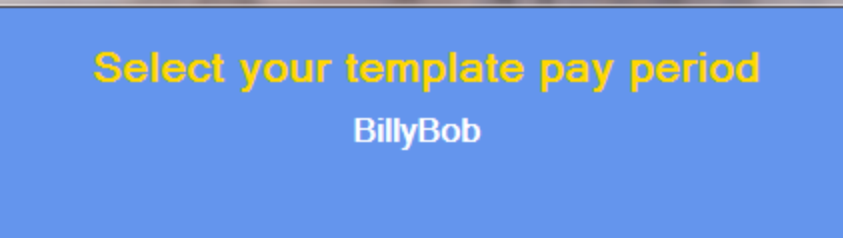
Then, whenever you select a future budget that is “empty”, all you have to do is to click on the **Load from Template** button and ... voila ... the budget is finished and ready to rock n roll.

9.0 – Templates

To create Templates, go to the Configuration Menu and click on **Pay Period Templates**.

You may have different Templates for each of your configured pay periods. Bills are often due at different times of the month. You might need to pay these six bills on the 15th of the month and these seven different bills on the last day of the month, for example. In this example, you would create a Template for the 15 of the month Pay Period and a Template for the Last Day of the month.

After clicking on the **Pay Period Templates** button on the Configuration Menu, the following screen will be displayed:



The screenshot shows a Windows-style dialog box titled "Select your template pay period". The title bar includes standard minimize, maximize, and close buttons. The dialog has a blue background. The main text, "Select your template pay period", is in a large yellow font, with "BillyBob" centered below it in a smaller white font. A label "Pay Period:" is positioned to the left of a dropdown menu. The dropdown menu is currently set to "15th of the month" and has a small downward arrow on its right side. At the bottom right, there are two buttons: a green "OK" button and a red "Cancel" button.

Select your template pay period

Select your template pay period

BillyBob

Pay Period: 15th of the month

OK Cancel

Select the Pay Period that you want to create a Template for and then click on the **OK** button.

After clicking on the **OK** button, the following screen will be displayed:

Configuration of pay period templates

Last day of the month

Income Source:

Amount:

Expense Description:

Amount:

OK

Cancel

Note that you may enter (up to 2) Income Template records and (up to 13) Expense Template records. The following screen shows a sample Template created for the 15th of the Month Template:

Configuration of pay period templates

Configuration of pay period templates

15th of the month

Income Source:

Amount:

Payroll check	2800

Expense Description:

Amount:

A-Groceries	200
Cell phone bill	155
Comcast	125
House payment	1500
Pet food	85
Truck payment	450

OK

Cancel

10.0 – Searching and Reporting

Go to the **Main Budgeting Menu** and select the green “**Reporting**” button and the following screen will be displayed:



The screenshot shows a window titled "Reporting" with a blue background. At the top, the word "Reporting" is in yellow, and "BillyBob" is in white. Below this, there is a "Timeframe:" label followed by a dropdown menu showing "Make a selection". In the center, there is a small image of a calendar with red numbers. Below the image, the word "CRITERIA:" is in yellow. Underneath, there is a "Type:" label followed by a dropdown menu showing "Make a selection". A horizontal line separates this section from the bottom section. At the bottom, there is a "Search method:" label followed by a dropdown menu showing "Make a selection". Below that is a "Search for:" label followed by a text input field. In the bottom right corner, there are two buttons: a green "OK" button and a red "Back" button.

This screen/menu is used for specifying your searching criteria.

With the **Timeframe** drop-down menu, you have the following four choices:

- From the ‘Big Bang’ to the End-Of-Time
- From the “Big Bang” to today’s year and month
- From Today’s year and month to the End-Of-Time
- Custom Dates

I believe the first three selections are obvious and selecting “**Custom Dates**” dynamically changes the screen area showing the calendar and allows you to specify any month and any year between 2010 – 2050

With the **Type** drop-down menu, you have the following two choices:

- Income record
- Expense record

If you select “**Expense record**”, then a new drop-down is dynamically created called “**Status**” and it will display the following two choices:

- Paid record only
- All records

With the **Type** drop-down menu, you have the following four choices:

- Begins with
- Contains
- Match entire field
- Show ALL

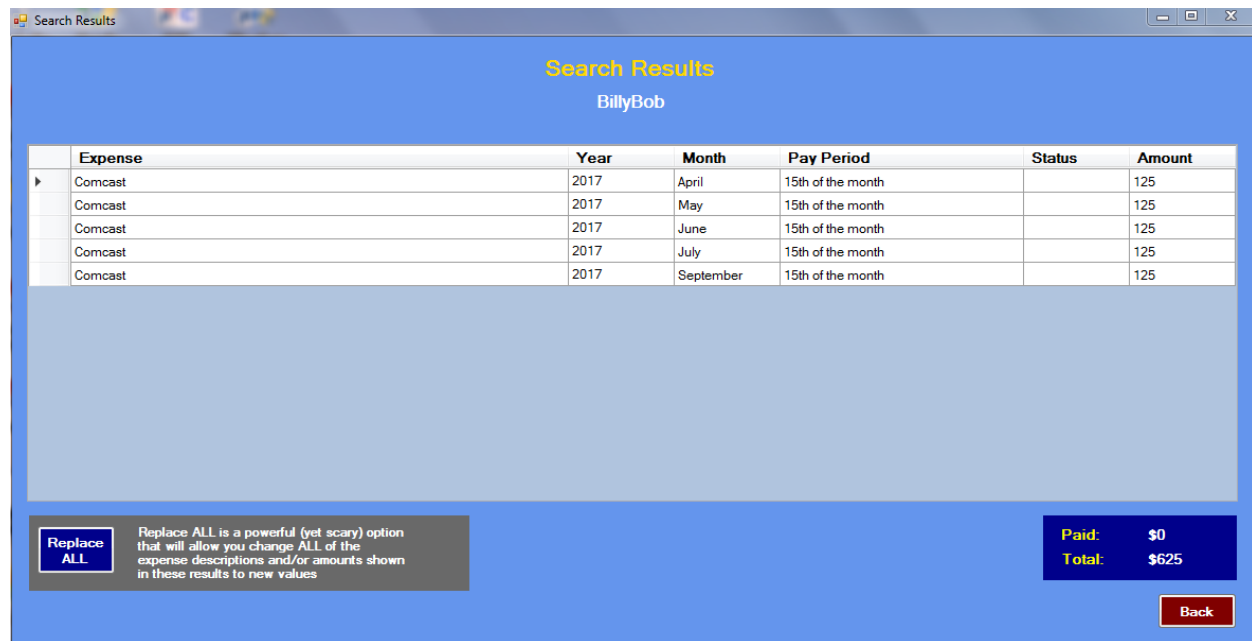
Lastly, enter the search string to search for in the **Search for** field

By example, pretend that you wanted to search all budgets in the database for **all expense records** configured whose descriptions **contained** the string “**Comcast**” for the time period of **January – December of 2017**.

Then, the following screen represents the selections that you would make to accomplish that goal:

The screenshot shows a window titled "Reporting" with a subtitle "BillyBob". The window has a blue background. At the top, there is a "Timeframe:" label and a dropdown menu set to "Custom Dates". Below this, there is a grey box containing "FROM:" and "THRU:" sections. The "FROM:" section has "Year:" set to "2017" and "Month:" set to "01-January". The "THRU:" section has "Year:" set to "2017" and "Month:" set to "12-December". Below the grey box, there is a "CRITERIA:" section. It has "Type:" set to "Expense record" and "Status:" set to "All records". Below the criteria section, there is a "Search method:" label and a dropdown menu set to "Contains". At the bottom, there is a "Search for:" label and a text input field containing "comcast". To the right of the input field are two buttons: "OK" (green) and "Back" (red).

After clicking the **OK** button, **MyBudgets** (for BillyBob) would then display the following Results screen:



Expense	Year	Month	Pay Period	Status	Amount
Comcast	2017	April	15th of the month		125
Comcast	2017	May	15th of the month		125
Comcast	2017	June	15th of the month		125
Comcast	2017	July	15th of the month		125
Comcast	2017	September	15th of the month		125

Replace ALL
Replace ALL is a powerful (yet scary) option that will allow you change ALL of the expense descriptions and/or amounts shown in these results to new values

Paid: \$0
Total: \$625

Back

As you can see, **MyBudgets** is displaying the budgets where BillyBob has configured to pay Comcast. Since the status field is blank for each of them (coupled with the pay period, we can see that these are payments to Comcast are planned to be paid in the future) (Although depending upon when you read this documentation, those dates may be in the past! 😊)

If the status of a record was configured as **“Paid”**, then the status column would display **“Paid”** with a green background and white foreground color.

Note also that the total of each of these payments sums to \$625.

Now, further pretend that these are future payments to Comcast but they raised their monthly rate from \$125/mo. to \$135/mo. (Now, that would be a big surprise, wouldn't it!? 😊)

One could edit each of these five budgets separately and change the payment amount to Comcast from \$125 to \$135 ... or you guessed it ... there is an easier way!

Note the button on the bottom left hand corner that says **“Replace ALL”**

One can use this button to automagically change all of those future Comcast payments from \$125 to \$135 in one fell swoop. (What in tarnation is a “Swoop” 😊)

To do this, click on the **Replace All** button and the following screen is displayed:

Replace all matches with new expense description and/or amount

BillyBob

You may enter new data in either (or both) of the following two fields:

New expense description:

New expense amount:

Replace All **Cancel**

In this example, we left the expense description blank. This means that we do NOT want to change the expense description (in this case "Comcast") to anything different. We only want to change the Expense amount to \$135.

So ... after entering 135 for the new expense amount in the screen shown above, the following slightly changed Results screen is displayed: (All expense amounts have been changed to \$135)

Search Results

BillyBob

Expense	Year	Month	Pay Period	Status	Amount
Comcast	2017	April	15th of the month		135
Comcast	2017	May	15th of the month		135
Comcast	2017	June	15th of the month		135
Comcast	2017	July	15th of the month		135
Comcast	2017	September	15th of the month		135

Replace ALL Replace ALL is a powerful (yet scary) option that will allow you change ALL of the expense descriptions and/or amounts shown in these results to new values

Paid: \$0
Total: \$675

Back

Here is another example. Suppose that you changed Internet Provider and want all of your future entries in all future budgets changed from "Comcast" with an amount of \$135/mo. to "Century Link" with an amount of \$112/mo.

To do this, you would enter your search criteria including the **Timeline** dates (in this case future dates) and search on "Comcast" and then click on that **Replace All** button on the bottom left hand corner and enter the values shown in the screen shot below:

Replace all matches with new expense description and/or amount

Replace all matches with new expense description and/or amount
BillyBob

You may enter new data in either (or both) of the following two fields:

New expense description:

New expense amount:

Replace All **Cancel**

11.0 – Passwords

MyBudgets supports up to two users. Possible scenarios where a second user might be useful are:

- One computer in a dorm, house, rental, etc. where two individuals manage their own finances
- One user used for the household budgeting and the other user for a home-based business

As you recall, when you configure new users, the **New User** screen allows you to configure a password for that user. If you leave the password fields blank, then this user has no password.

But, what if you decide later to do any of the following:?

- Add a password for a user
- Change a password for a user
- Remove a password for a user so that there is no longer a password.

If any of these are needed, then go to the **Main Budgeting Menu**, click on the blue **Configuration** button and then click on the **Password Maintenance** button. The following screen is displayed:

Password Maintenance
BillyBob

To remove your password, simply leave both fields blank and click the OK button

Password:

Confirm:

OK **Cancel**

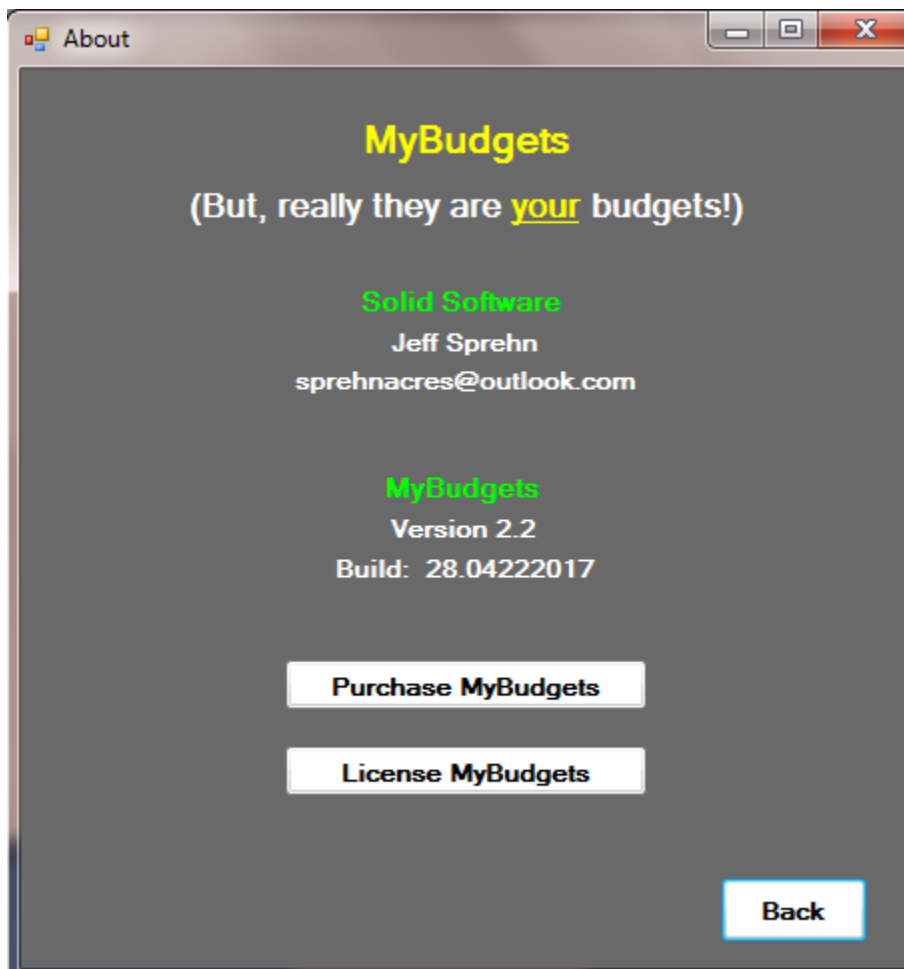
On the screen shown on the preceding page, you can create a password for a user that formerly did not have a password, change the password to a different value or remove a password from a user by leaving both fields blank

12.0 – Database backup

All of the data for your budgets is stored in one database file – called **VBBudget.MDB**. Should your physical hardware “Go South” (as they say) and you haven’t made backups of VBBudget.MDB, then all of that information is gone forever. Therefore, it is strongly recommended that you backup this file periodically. (By the way: I have always wondered whether folks from Argentina that have computers malfunction tell other Argentineans that their computer “Went North”? ☺)

13.0 – Purchasing MyBudgets

The cost for **MyBudgets** is \$19.95. To purchase this (fine) ☺ product, click the **About** button on the bottom left hand corner of the main screen. After clicking the **About** button the following screen will be displayed:



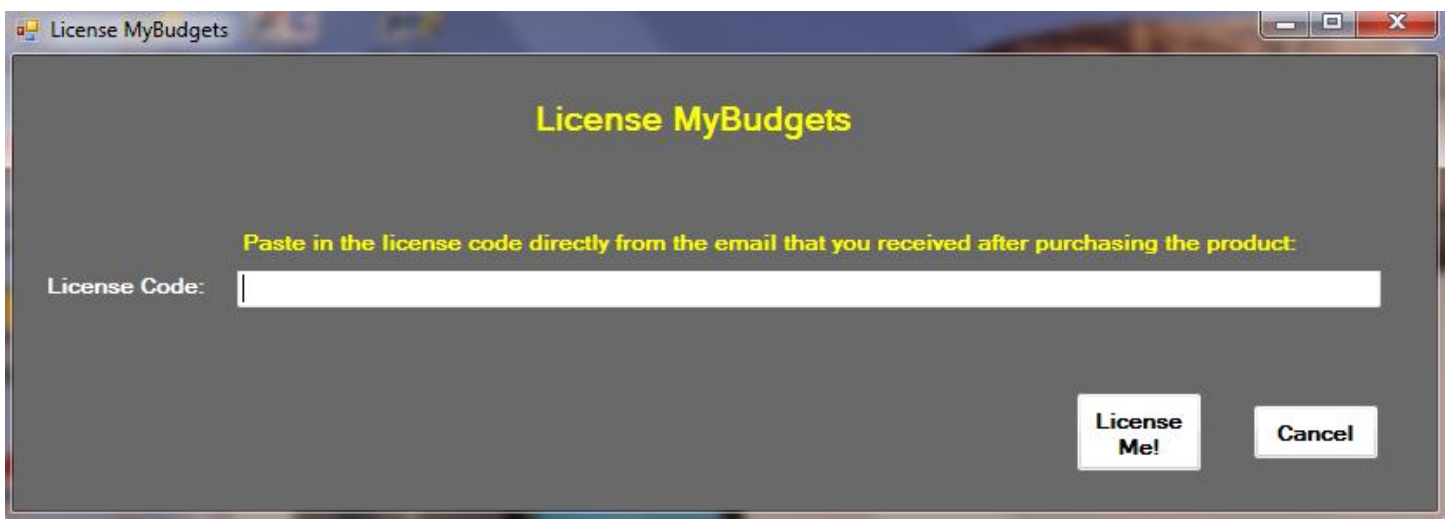
Simply click on the **Purchase MyBudgets** button and it will take you to <http://SolidSoftware.2ya.com> where there is a link that allows you to purchase this product using either PayPal or any major credit card.

Once payment is made, you will receive an email from Sprehnacres@Outlook.com containing the license code to enter into this program in order to convert it to a licensed program (rather than the 30-day trial version). Instructions for doing that are shown below in **13.0 – Licensing MyBudgets**.

14.0 – Licensing MyBudgets

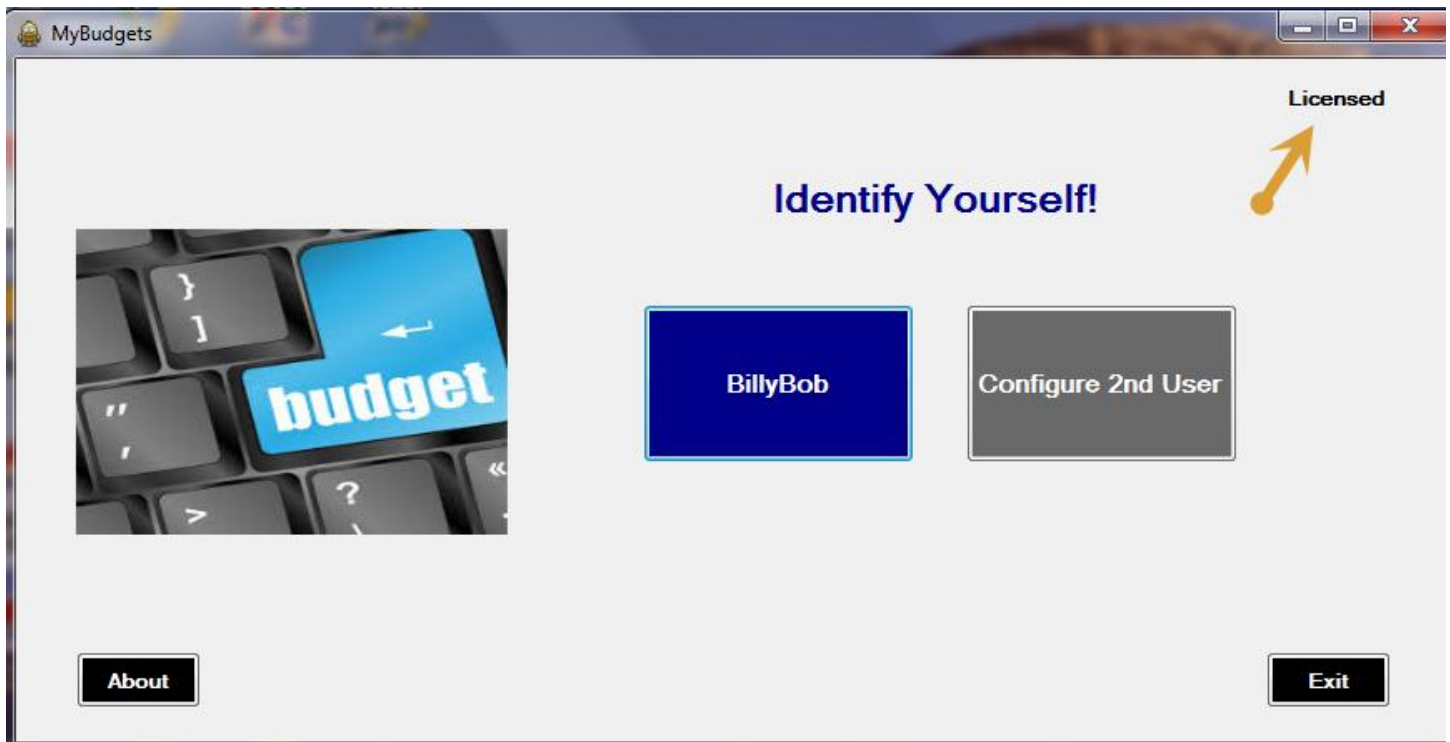
To license **MyBudgets**, go to the main screen and click on the **About** button but this time click on the **License MyBudgets** button.

The following screen will be displayed:



Simply type in (or cut-n-paste) the License Code shown in the email from Sprehnacres@Outlook.com and click the **License Me!** Button.

After clicking that button, the program will end and then the next time that you start up **MyBudgets**, the main menu will look like what is shown on the following page:



15.0 – Support for MyBudgets

Please feel free to contact me via email at Sprehnacres@outlook.com should you have any questions or problems with **MyBudgets**. I will do my best to help you.

Any new product releases will be downloadable at <http://SolidSoftware.2ya.com>