expenses

version

BoostMyShop

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expenses

1. Overview

Tired to manage all expenses and invoices in a separate spread sheet ? Need an EDM to fill charges and store documents ? Expenses extension for Magento is the solution.

Once extension is installed, you can fill new expenses in menu reports > expenses > manage. For each expense, you can set label, comments, amount, tax, category, payment method..

2. Installation

WARNING :

Before files upload, **ENABLE MAGENTO CACHE** : this will prevent Magento to try to install extension before all files are uploaded.

Also, if you have any :

- APC cache
- Redis cache
- Memcache
- Activated the Compilation of Magento

-> Please disable them

Open the file “app/etc/local.xml” and check for / switch off any other extra caches.

You just need to upload this file structure to your server on the same file structure provided by Magento.

No code file will be erase : All the code files will be available into /app/code/community/MDN

Once all files are copied, please follow here under steps to make sure it is well installed:

Refresh cache (System menu > Cache settings): If you get any error message at this stage, it means that there are some problems with the installation.

Refresh indexes (System > Index management)

Disconnect and reconnect yourself from Magento’s back office.

Upload files

Unzip the archive and upload it into your remote web site.

Once all files are uploaded, you have to refresh both magento and index caches.

Once caches are refreshed, log out and login from admin panel (to reset permissions).

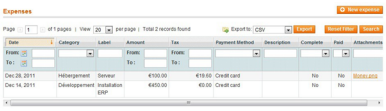
3. Configuration

You can display settings using menus “System > Configuration > Expenses”

Here you can configure your own categories, payment method and currencies. All values must be separated with a semi colon “;”

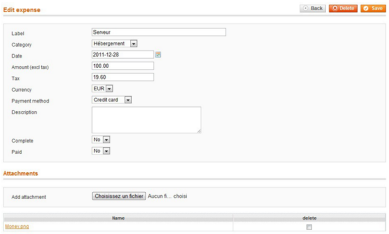
4. Manage expense

To manage expenses (search, delete, add), go in menu Reports > Expenses > Manage :



From here, you can :

- Create a new expense, click on “New expense” button.
- Edit an expense, click on the expense row.
- Download an attachment, click on the link



Notes :

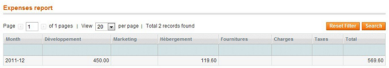
- You can customize category / payment method / currency list in system > configuration > expenses
- Attachments can be added only once expense is created
- To add a new attachment, select the file and click on ” save ” button

5. Export

You can export expenses in CSV format from reports > Expenses > Manage: fill search criteria in column filter and click on search button. Then, select “CSV export” in export drop down menu.

6. Import

Reports are available in menu Reports > Expenses > Report :



A row is created for each month; all categories are displayed in columns.