

Coding your transactions

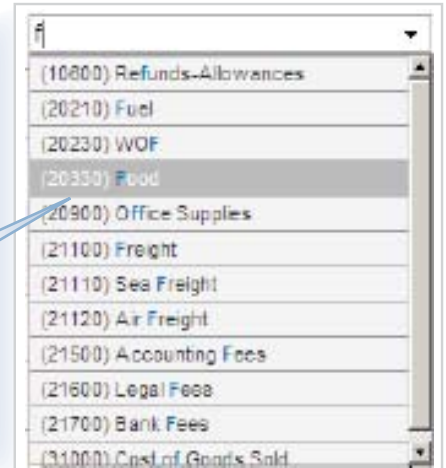
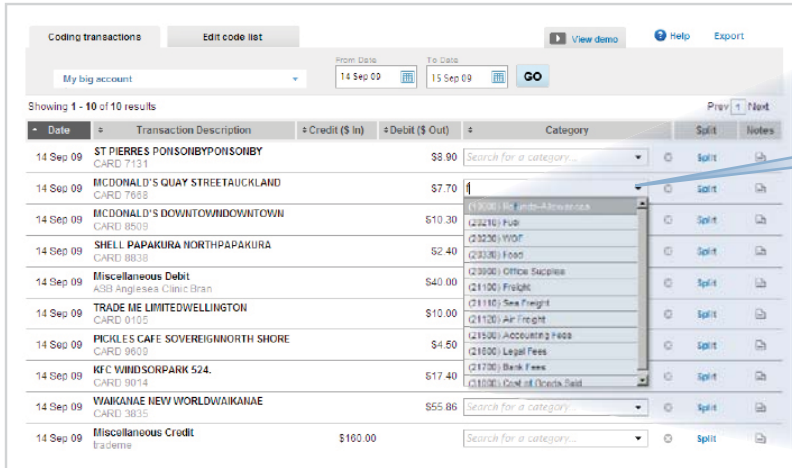
The “Coding” page will show the transactions for your account.

Step 1. Click on the dropdown list in the Category column of the transaction you want to code.

Step 2. Choose which category name/code matches where you would like this coded.

Coding your Transactions in Business Cash Plan.

Category dropdown box.



Why Code?

Coding helps you understand where your money comes from and goes to. By coding accurately, your transactions can be organised in a meaningful way.

Top Tip: You can type any letter or number in the dropdown box. Categories or codes with those figures will be displayed below. Making it easy to find the right category quickly. The figure you type will display in blue.

e.g. **f** Food **WOF** Fuel

Splitting your Transactions

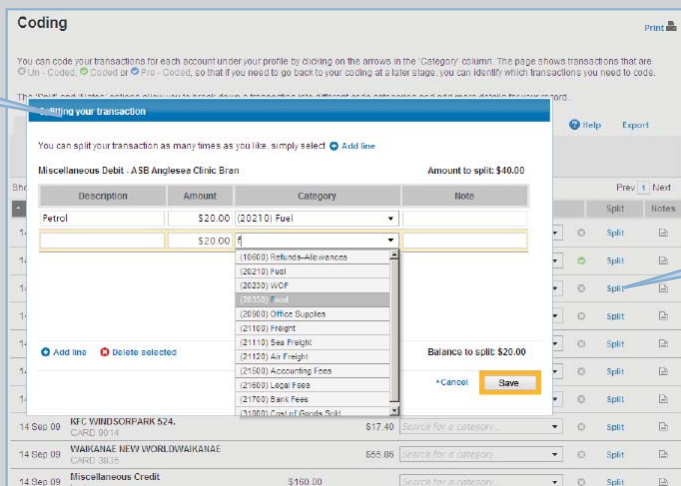
You can “Split” your transactions as many times as you want.

Step 1. Click on the Split* function of the transaction you want to split.

Step 2. A pop-up window will open. Click ‘Add Line’ and a new line will appear. Code each using the dropdown box.

*What is a Split?

The “Split” function allows you to break a transaction in multiple parts, so that each part can be coded separately. You can also exclude parts by using the exclude category.



For a detailed demonstration of coding and splitting, you can watch the online demo. <https://www.asb.co.nz/bcp-demo/code-split>