

Expenses — SOP

How this module works

Track business spending — quick-add with automatic category/GST suggestions, budget tracking, vendor breakdown, GST ITC, recurring charges, and client-linked profitability.

SECTIONS

● Overview This month/last month/top category/all-time KPIs, plus the full searchable, filterable expense list.	● Budget & Vendors Monthly budget vs actual per category, and your top vendors by spend.
● Trends & GST Category breakdown, 6-month spend trend, and GST ITC claimable + filing summary.	● Recurring Auto-repeating charges (rent, subscriptions) — set once, generated automatically on schedule.
● Clients Expenses linked to a client, with revenue and net profit per client.	

STEP-BY-STEP WORKFLOW

1	Click 'Add Expense' at the top any time — category and GST-eligibility are suggested automatically as you type the title.
2	Check Budget & Vendors to see how this month is tracking against what you've set.
3	Trends & GST for the bigger picture — spend over time and what's claimable as GST ITC.
4	Set up Recurring for anything that repeats on its own from then on.

CONNECTIONS

● AI CFO Every expense category, this month's spend, and P&L costs are read live from here by AI CFO — nothing to re-enter or keep in sync on that side.	● Bank Picking a bank account on an expense auto-creates a matching debit transaction in Bank — the ledger and this list can never drift apart.
● Salary Marking a salary paid there auto-creates a matching expense row here (category Salary) — payroll spend shows up the same day it's paid, no manual double-entry.	● Vendor Payments Same auto-create-expense behavior as Salary — a vendor payment marked paid there becomes a real expense here automatically.
● Leads Linking an expense to a client here (a Lead) is what powers the Clients tab's per-client spend and profitability view.	● Invoice The Clients tab's Revenue and Net Profit columns read that client's paid invoices live from Invoice — always current, never a manually-typed figure.

