

Exporting Expenses/Mileage from Trip Boss™

Online Tutorial

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Trip Boss™ can be used to record travel expenses and mileage on your Palm handheld and Treo. However, exporting this data to your PC desktop for formatting, cutting/pasting data, and printing, is very useful. This tutorial is written for PC users, however, some of the same methods can be used for the Mac and Linux users.

Step 1: Export data to memo pad on your handheld

To export the expense data, from the drop down menu, tap “Record” “Export Expenses...” (or “Export Mileage...” to export Waypoints data). This action exports all raw (prior to currency conversion) expense data to a memo entry, already in CSV (comma separated value) format. The date and time of the export is noted in the memo so that it is possible to determine the most recently exported data.

Step 2: Transferring the memo to your PC

A: Via Hot Sync®

Hot sync® your Palm handheld/Treo to your PC. You should see the exported Memo on the Palm Desktop. (If you use a different hot sync conduit, you should also see the Memo. The following information is specific to using the Palm desktop, but similar steps should work for other conduits.) To export the memo to a format for use with other applications, open the Palm desktop. Open “Memos,” then highlight the expense memo to export. From the menu, select “File” “Export...” A dialog box comes up--click “Export.” Choose a location to store the exported file (the default location is to store the file on the Desktop), and chose “Text (*.txt)” as the “Export type:”. Give it meaningful file name, “MyTripXYZExpenses.csv”, **but be sure to add a .csv file extension**. Hit OK. Accept the default on the next dialog box by clicking OK.

Comments: FYI, the reason for selection of “Text (*.txt)” instead of CSV is that the exported memo is already formatted in CSV. If you select CSV again, you would get double double-quotes and it wouldn't import properly. The reason for giving the file the extension .csv is that this will allow you to click on the file on your desktop (or wherever you put it) and, by default (usually), Excel/Open Office spreadsheets will open up to read it. If you leave the .txt extension, Word, or Notepad would want to read it and the file would not import nicely into the spreadsheet format.

B: Via Infrared beaming

If your PC/laptop has IR capability, you can also beam the memo on your handheld directly onto your computer. In Windows, the file will show up as a .txt file. If you want to read this into a spreadsheet, getting the data into columns and rows, rename the file to a .csv extension. Move onto Step 3.

Step 3: Getting the .csv file into a spreadsheet

Now that you have the file on your desktop (or elsewhere), you can bring it up into Excel or Open Office by opening the file. It should put everything into the proper columns and rows. From here you can cut and paste information into a company expense report, or just manipulate the spreadsheet to your preference for storing and printing. For example, you can sort by the categories and sum the expenses in any way you wish from within the spreadsheet application. Lastly, you can print the spreadsheet file for tax purposes and/or as a record for reimbursement.

Special Steps to export using Outlook

Step 1: Export from Trip Boss

See Step 1 above.

Step 2: Transfer Memo to Outlook via Hot Sync.

Step 3: Manipulation using from Outlook to a .csv file and opening in Excel.

A: Open the Memo in Outlook.

B: Highlight the text (select all) in the Outlook note.

C: Select "Copy" from the menu to copy the text.

D: Open "NotePad".

E: Paste text into NotePad.

F: Save file as *filename.csv* where *filename* is of your choosing. type=txt, encoding=ANSI

G: Open Excel.

H: Select "File" "Open" and select *filename.csv* that you just created. The file should open correctly with the data appearing in the proper cells, columns, and rows. From here you can cut and paste information into a company expense report, or just manipulate the spreadsheet to your preference for storing and printing. For example, you can sort by the categories and sum the expenses in any way you wish from within the spreadsheet application. Lastly, you can print the spreadsheet file for tax purposes and/or as a record for reimbursement.

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