

Payees & Categories

Create and maintain the people or businesses you pay and the reasons you spend money.

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How to Create an Expense Payee

1. Open the Expense module and go to **Payees**, or choose **Add New Payee** while creating an expense.
2. Enter the payee's name.
3. Add useful contact information such as phone number and email.
4. If needed, add an account number, website, address, and notes.
5. Save the payee.

Create payees for employees, landlords, utilities, service providers, government agencies, and any other person or organization your business pays.

How to Create an Expense Category

1. Open the Expense module and go to **Categories**, or expand Other Options while creating an expense and choose **Add New Category**.
2. Enter a clear category name.
3. Save the category.

Useful categories include Salary, Rent, Utilities, Advertising, Insurance, Office Supplies, Repairs and Maintenance, Bank Fees, and Professional Services.

Avoid creating several names for the same purpose, such as “Electric,” “Electricity,” and “Power Bill.” Consistent categories produce cleaner reports.

How to Edit or Remove a Payee

1. Open **Expense** → **Payees**.
2. Find the payee.
3. Choose the edit action to update the name, contact details, account information, address, or notes.
4. Save the changes.

Remove a payee only when it is no longer needed and your permissions allow it. If the payee has historical expense records, preserve reporting integrity and follow the system's validation rather than recreating or deleting history casually.

How to Choose Useful Expense Categories

Categories should be broad enough to reuse but specific enough to support decisions.

Good structure

- Payroll or Salary
- Rent
- Utilities
- Advertising and Marketing
- Insurance
- Office Supplies
- Repairs and Maintenance
- Professional Fees

Use the same category for the same kind of expense every time. The payee can vary while the category remains the same—for example, several employees may all use the Salary category.