

How to manage expense categories and types

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Consistent expense categories make financial reporting far more useful.

Managing categories

1. Go to **Expense Categories** (or the relevant Settings area).
2. Review the existing list.
3. Add new categories only when necessary. Use clear, specific names such as:
 - Program Supplies
 - Travel - Staff
 - Travel - Volunteers
 - Office - Software
 - Event - Catering
4. Avoid creating many overlapping or vague categories.

Your finance lead or bookkeeper should help define and maintain the official list. Once categories are stable, everyday users simply choose from the list when entering expenses.
