PEAK OTTER · OTTERSPEND FOR AMAZON

OtterSpend User Guide

Turn your Amazon order history into a clear picture of where your money goes. Everything runs in your own Google account, and your data stays yours.

Guide v1.2 For OtterSpend v1.2.0 Updated Oct 2026

1 Copy · 2 Authorize · 3 Clear samples · 4 Get Amazon data · 5 Import · 6 Review · 7 Dashboard · 8 Export

BEFORE YOU START

Welcome to OtterSpend

OtterSpend reads your Amazon orders, sorts every item into a spending category, and shows you the totals by month and year. No subscription, and nothing is sent to an outside server.

- Imports retail orders, Kindle and digital orders, and returns
- Sorts items into 24 built-in categories using about 1,360 keyword rules
- Subtracts per-item discounts and checks totals against Amazon's own numbers
- Matches refunds and returns to the original items
- Asks you to confirm uncertain items, then remembers your choice
- Exports your itemized data as a CSV whenever you want

What you need

A Google account, a computer for setup and import, and about 15 minutes. Amazon can take a few days to prepare your data, so request it first (Step 4) and do the other steps while you wait.

STEP 1

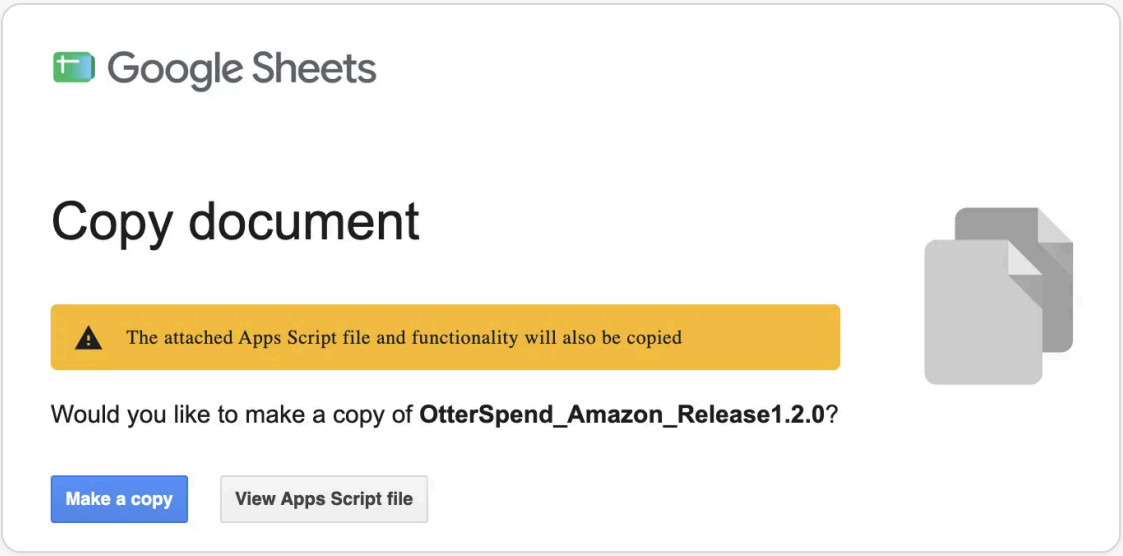
Get your copy

OtterSpend lives in your own Google Drive. You'll make a private copy and work only in that copy.

Your link is on your OtterSpend Access Card

It's the one-page PDF that came with your purchase. Keep it somewhere safe.

1. Open your Access Card and click **Make my copy**. Sign in to your Google account if asked.
2. On **Copy document**, click `Make a copy`. The yellow note just means the OtterSpend script comes with the copy, which is what you want.
3. Your copy opens in a new tab, saved in your Drive. Click its name at the top left to rename it, for example *My OtterSpend*, and bookmark it.



1.1 Google's "Copy document" screen. Click Make a copy.

Your copy is private

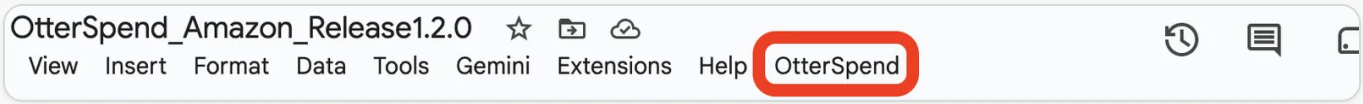
Nothing you do in your copy changes the original or anyone else's data.

STEP 2 · FIRST TIME ONLY

Authorize OtterSpend

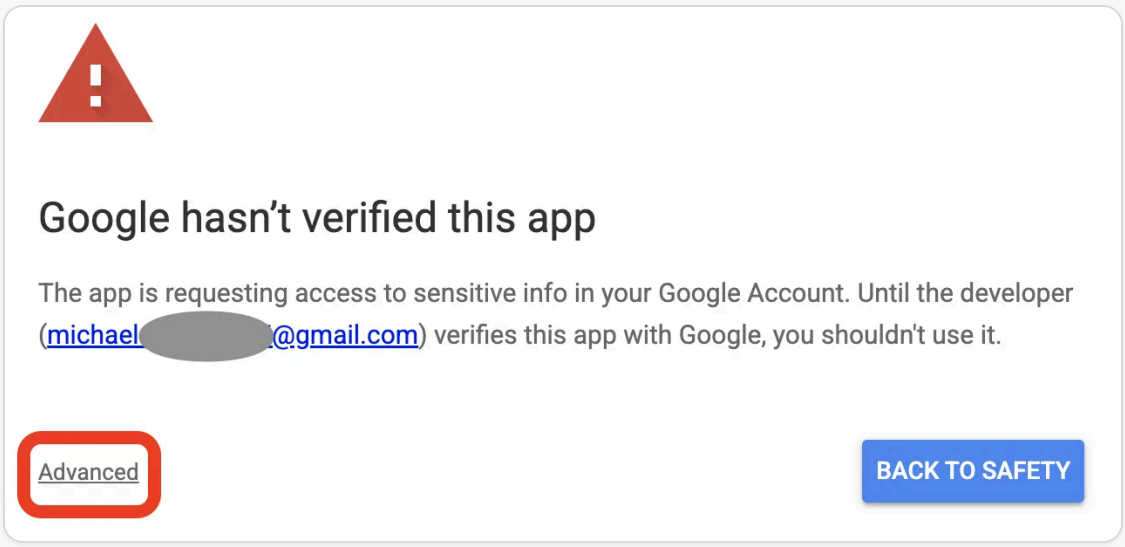
OtterSpend runs a small script inside your copy. Google asks for your permission the first time you use it. You don't need to open or edit any code.

1. Wait a few seconds after your copy opens. An `OtterSpend` menu appears at the end of the menu bar. If it doesn't, refresh the page.



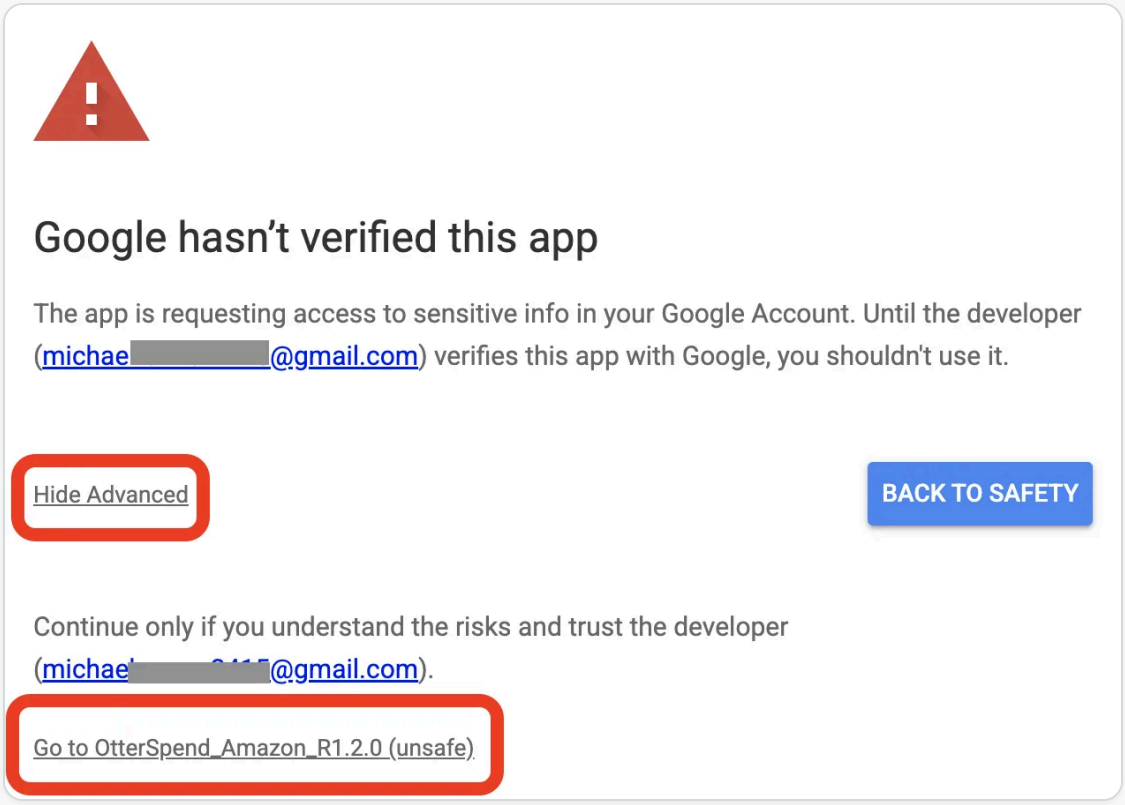
2.1 The OtterSpend menu at the end of the menu bar

1. Click `OtterSpend` → `Start here`. Google asks you to authorize before it opens.
2. Click `Continue` and choose your Google account.
3. On **Google hasn't verified this app**, click `Advanced`.



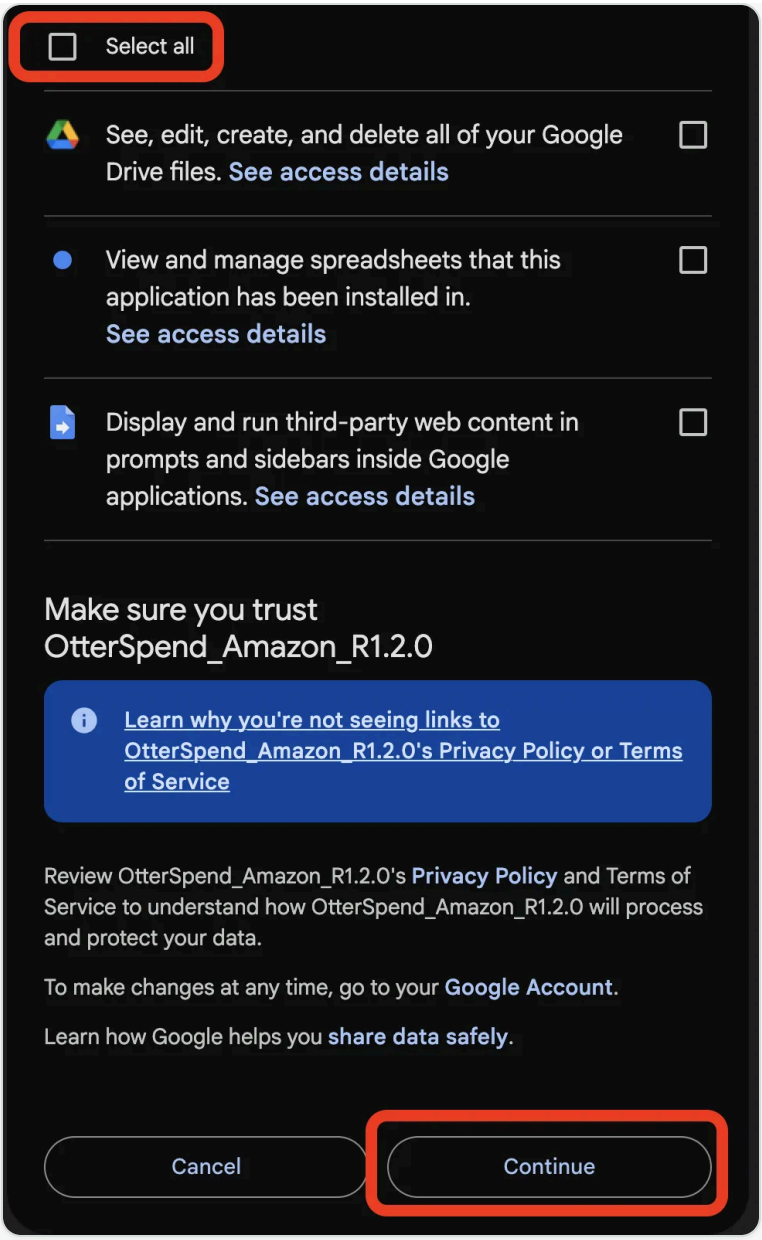
2.2 Click Advanced

1. Click `Go to OtterSpend_Amazon_R1.2.0 (unsafe)`.



2.3 Click Go to OtterSpend_Amazon_R1.2.0 (unsafe)

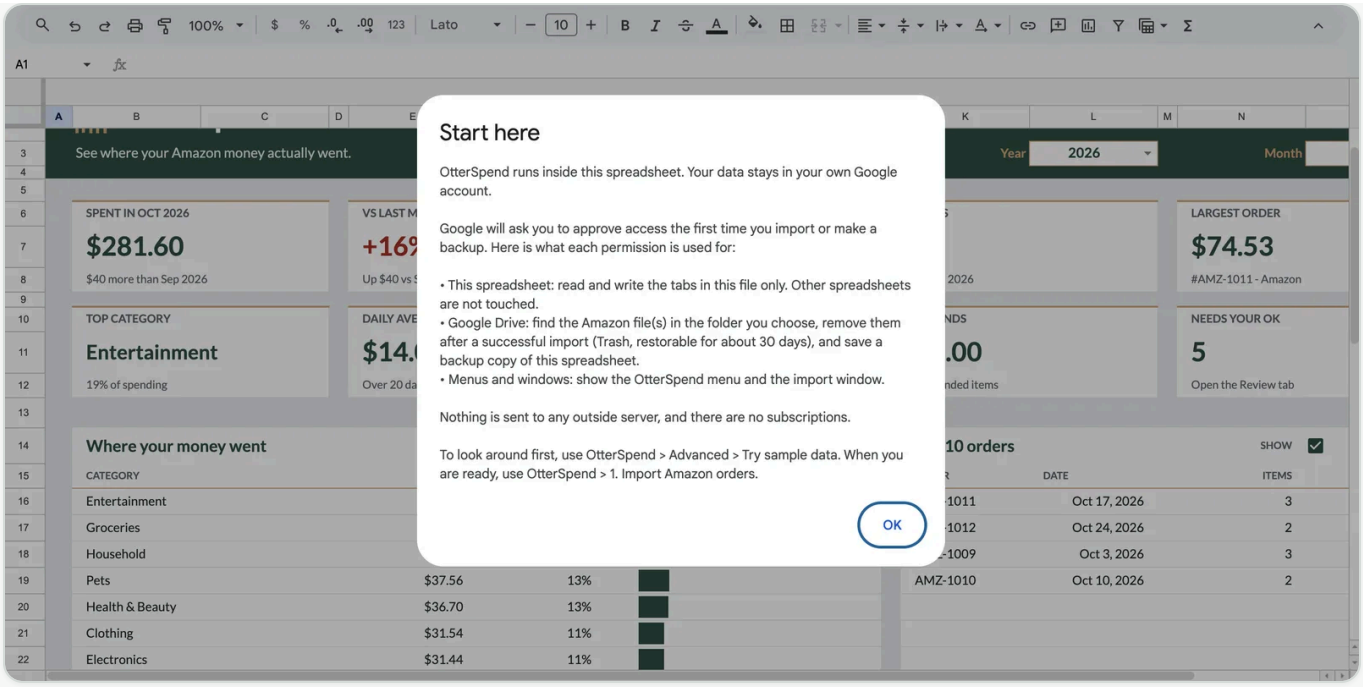
1. Tick `Select all`, then click `Continue`.



2.4 Tick Select all, then click Continue

> **Tick “Select all”**
>
> If any box is left unticked, importing won't work. If that happens, run the menu item again and tick everything when Google asks.

1. The **Start here** window opens and explains what each permission is for. Read it and click `OK`.



2.5 The Start here window explains each permission

Why the warning?

OtterSpend is a private script in your copy, not an app in Google's public store, so Google shows this warning for it. It reads and writes only this spreadsheet. In Google Drive it looks only in the folder you choose for your Amazon files, moves them to Trash after a successful import (you can restore them for about 30 days), and saves backup copies of this spreadsheet. Nothing is sent to any outside server.

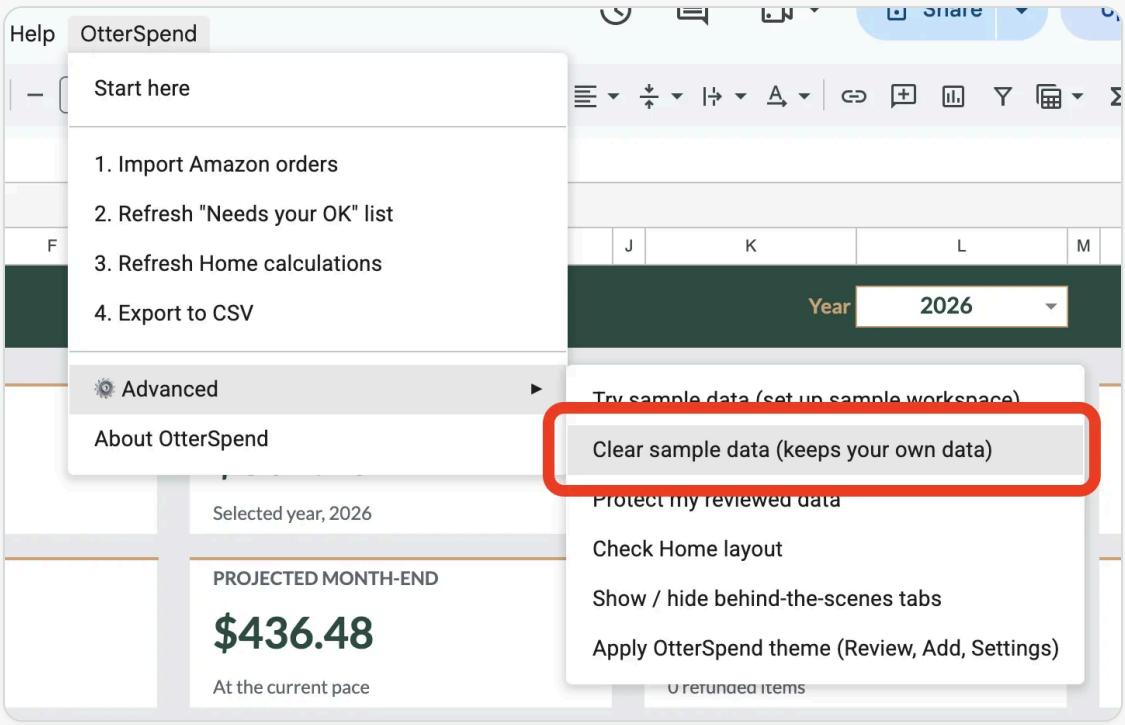
STEP 3

Explore, then clear the sample data

Your copy comes with sample Amazon orders so you can see how everything works. Look around first, then clear them out before importing your own orders.

1. **Explore (optional).** Open **Home**, change the Year and Month, and look at the Review and Settings tabs.
2. Click `OtterSpend` → `Advanced` → `Clear sample data (keeps your own data)` and confirm.

3 Check that Home shows $0 for the selected period.



3.1 Advanced → Clear sample data (keeps your own data)

Safe to run any time

Clear sample data removes only the sample rows. Your own imported orders are never touched.

Don't use “Try sample data” after you import

It's in the same Advanced menu. It rebuilds the workbook with fresh samples and asks you to type `ERASE` first. Typing it on a sheet with your real orders erases them.

STEP 4

Get your Amazon order data

Amazon sends your full order history as a ZIP file through its **Request your data** page.

Open Amazon "Request your data" →

amazon.com/hz/privacy-central/data-requests

1. Sign in to amazon.com and open the page above.
2. Next to **Your Orders**, click `Submit Request`.
3. Confirm the request from the email Amazon sends you.
4. When Amazon emails that your data is ready, download the ZIP.

4.1 Next to Your Orders, click Submit Request

You can import the ZIP as it is. OtterSpend finds the files it needs inside. If you unzip it, these are the three files that matter:

FILE	FOLDER	WHAT IT HOLDS
`Order History.csv`	Your Amazon Orders	Physical items you bought. Required.
`Digital Content Orders.csv`	Your Amazon Orders	Kindle books, apps, videos, memberships and subscriptions
`Returns Status.csv`	Your Returns & Refunds	Returns and refunds, matched to your items

4.2 The three files OtterSpend uses, highlighted

You can ignore the other files.

STEP 5 · ON A COMPUTER

Import your orders

1. Click `OtterSpend` → `1. Import Amazon orders`.

2. Choose where your file is:
   - **Upload from this device:** click `Choose Files` and pick the ZIP, or the CSV files. You can pick several at once.
   - **From Google Drive:** pick the Drive folder where you saved the files.
3. Under **Which orders to import?**, choose a Year (or *All years*) and tick the months you want. Use *all* or *none* to tick them quickly.
4. Click `Import` and wait for the summary.

5.1 Import window: where your file is, plus the year and months to import

Reading the summary

When the import finishes, a green box tells you what happened:

- How many items and orders were added, including Kindle and digital orders
- How many items need a look on the Review tab
- Free ($0) digital items that were skipped
- How many refunds matched an item, and how many belong to orders you haven't imported
- Orders skipped because they fall outside the year and months you chose

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5.2 The summary after an import

Importing again is safe

Duplicates are skipped, so you can import overlapping months or the same file twice. With the Drive option, your files go to Trash only after a successful import, and they stay put if any orders were skipped.

STEP 6

Review your categories

Open the **Review** tab (*Needs your OK*). Items land here when OtterSpend isn't sure of the category, when a refund only partly matched, or when a gift card looks like it was bought for someone else.

1. Check the category for each row. Rows with a blank category need one picked.
2. If the category is wrong, pick the right one from the dropdown. That saves it.
3. If it's already right, tick `Looks right?`. That saves it too.

6.1 The Review tab. Change a category or tick Looks right? to save it.

OtterSpend remembers each choice by product, so the same item is sorted correctly on future imports and you review less each month.

Refresh the list

After you've worked through some rows, or after a new import, click `OtterSpend` → `2. Refresh "Needs your OK" list`. Rows you've saved drop off, and anything new that needs a look is added.

6.2 OtterSpend → 2. Refresh "Needs your OK" list

Gift cards

Gift cards and reloads go to **Gift Cards & Reloads**, which is left out of your totals so money isn't counted twice. If a gift card was a present, move it to **Gifts**.

Protect your reviewed data

Use `OtterSpend` → `Advanced` → `Protect my reviewed data`. Google then shows a warning before anyone edits the tabs that hold your items.

Read your dashboard

OtterSpend has two dashboards: **Home** for a computer screen and **Home (Mobile)** for your phone.

- Pick the **Year** and **Month** in the green header at the top right of **Home**. Home (Mobile) follows the same choice.
- Each panel has a **Show** checkbox. Untick it to hide that panel.
- If the numbers look out of date, click `OtterSpend` → `3. Refresh Home calculations`.

7.1 Home on a computer, with Year and Month at the top right

CARD OR PANEL	WHAT IT SHOWS
Spent in month · Vs last month	The month's total and its change from the month before
Total spend · Items	The whole selected year, and items bought in the month
Largest order · Top category	Your biggest order and where most money went
Daily average · Projected month-end	Spending pace, and where the month will land at that pace
Refunds · Needs your OK	Refunds received, and rows waiting on the Review tab
Where your money went	Each category's amount and share
Top 10 orders	Your largest orders in the month, highest first

Categories switched off in Settings, such as Gift Cards & Reloads, still show their amount but are left out of totals and shares.

7.2 Home (Mobile) on a phone

On your phone

You can view both dashboards in the Google Sheets app. The OtterSpend menu appears only on a computer, so import and export there.

STEP 8

Export your data

1. Click `OtterSpend` → `4. Export to CSV`.

8.1 OtterSpend → 4. Export to CSV

1. Choose **All items** (everything imported or added) or **Reviewed items only** (the ones you approved on the Review tab).
2. Click `Download CSV`. It opens in Excel, Numbers or any spreadsheet app.
3. If the download doesn't start, copy the text in the box into a new file and save it with a `.csv` ending.

8.2 The export window

Each row has the item ID, order ID, order date, merchant, item, quantity, unit price, item subtotal, tax, final total, category, ASIN, review date and status.

Your monthly routine

Request fresh Amazon data, import it, save anything on the Review tab, and export if you need a copy. Re-importing overlapping months is safe.

CUSTOMIZE

Settings & more

Categories

Settings has 30 category slots: 24 built-in and 6 empty for your own. Type a name into a yellow slot and it appears on the dashboards. The **Count in totals?** checkbox decides whether a category adds to your totals.

COLOR	MEANING
Green	Counted in totals
Gray italic	Not counted (unticked)
Yellow	Empty slot: add your own

Household, merchants and preferences

- **Household members** and **Merchants** are lists you can add to.
- **Ask me to check a guess when confidence is below** sets how sure OtterSpend must be before it skips the Review tab. Raise it to review more items, lower it to review fewer.
- **Only import orders from this year on**: leave blank to include all years.

Advanced menu

ITEM	WHAT IT DOES
Protect my reviewed data	Adds a warning before edits to your item tabs
Check Home layout	Checks the dashboard is set up correctly
Show / hide behind-the-scenes tabs	Shows the tabs that store your data and rules. Look, but avoid editing them.
Apply OtterSpend theme	Restores the standard look on Review, Add and Settings

Adding a purchase by hand

Use the **Add** tab for a purchase that isn't in your Amazon file.

HELP

Troubleshooting

PROBLEM	WHAT TO TRY
No OtterSpend menu	Refresh and wait a few seconds. Make sure you're in your own copy, on a computer.
“Google hasn't verified this app”	Expected. Advanced → Go to OtterSpend (unsafe) → Select all → Continue. See Step 2.
Import or Drive import fails	A permission was probably left unticked. Run the menu item again and tick Select all.
Import added nothing	Check the Year and months match your file. The summary tells you how many orders were outside your selection.
Total doesn't match Amazon	Check the Review tab, import Returns Status.csv, and check which categories are set to not count.
Kindle or app purchases missing	Import Digital Content Orders.csv as well, or the whole ZIP.
Dashboard looks out of date	OtterSpend → 3. Refresh Home calculations.
Sample rows still showing	Run Clear sample data (Step 3).

PROBLEM	WHAT TO TRY
Download CSV does nothing	Copy the text from the box in the export window into a file ending in .csv.

GOOD TO KNOW

Limits & support

- US dollars and amazon.com orders only
- Importing needs a computer
- About 3,000 items per spreadsheet
- Digital returns aren't matched yet

To check your version, click `OtterSpend` → `About OtterSpend`.

Get help

Visit PeakOtter.com or email **PeakOtterSupport@gmail.com**. Include what you expected, what happened, your version from About OtterSpend, and a screenshot if you can.