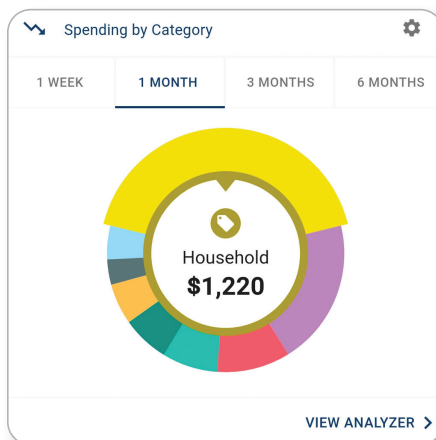


## GET STARTED GUIDE

# Now there's a smarter way to manage your money



## See your spending on the dashboard

The dashboard displays your top spending category each month.

- Step 1:** Click different parts of the wheel to see your spending breakdown. Transactions are sorted automatically into these categories with 'tags.'
- Step 2:** To personalize your categories, or split the transaction between tags, click on a transaction and edit the tag.
- Step 3:** When you select a transaction from the dashboard you can also change the name of the transaction, create a budget or add a recurring transaction to your Cashflow Calendar.

New Budget

1 Choose which tags to track

Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.

<input type="checkbox"/> Appliances \$0	<input type="checkbox"/> Auto \$0
<input type="checkbox"/> Auto Expense \$0	<input type="checkbox"/> Baby Expenses \$0

▼ SHOW MORE

NEXT

2 Choose the name & amount

3 Choose accounts

## Set spending targets

- Step 1:** Navigate to Budgets and click on "View Budgets."
- Step 2:** Choose one of the Spending Targets.
- Step 3:** Select "Edit Budget."
- Step 4:** Personalize your spending target by changing the monthly amount and item name (for example: "Baby Expenses"). Choose the purchase category tags you want to include in this budget.

## Track your **cash flow**

See down to the penny how much money you have coming in — and going out — each month. Simply log your income and bills into the cash flow calendar. Here's how:

- Step 1:** Navigate to the “Cashflow” section.
- Step 2:** Click the plus sign to add your income or bills.
- Step 3:** Put in your monthly income and expense amounts to calculate your monthly cash flow.

## Create **savings goals**

You can set up goals to help you plan ahead — like saving for a vacation or paying off credit card debt. Once that's done your Goal Summary will show you the completion date and the amount you need to save each month.

- Step 1:** Navigate to the “Goals” section and select “Add Goal.”
- Step 2:** Select your desired pay off or savings goal.
- Step 3:** Fill out the name of the goal, which accounts you'll use and your target date.
- Step 4:** Click “Save.” Your goals will automatically update based on your progress and day-to-day account balance.

## Add another **account**

You can sync accounts from other financial institutions to get a full picture of your finances.

- Step 1:** Navigate to the “Accounts” section.
- Step 2:** Click the plus sign to “Add Linked Account.”
- Step 3:** Select an institution or use the search to find your institution. Enter the account information and select “Connect.” You'll see a notification on your Dashboard once the account is successfully synced.

