

MONEY MANAGER

QUICK START GUIDE

Take charge of your finances with Money Manager. Check out the tools below to gain a better view of your financial situation.

DASHBOARD

Step 1: Select other parts of the wheel to see other category spending. Your transactions will categorize themselves with 'tags'.

Step 2: To personalize these categories, select the transactions 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.

BUDGET

New users can look at the insights for guidance on what to budget based on spending.

Step 1: Navigate to the Budget tab to create spending targets and begin tracking spending by category.

Step 2: Click 'Add Budget' button and follow the prompts to select transactions you want to track.

CASH FLOW

The cash flow calendar brings your budget to life through an interactive calendar.

Step 1: Navigate to the Cashflow tab to see your projected day-to-day cash flow.

Step 2: Add Incomes & bills like your paycheck, rent, utilities, etc. to more accurately forecast your cash flow.

GOALS

Create savings goals, like saving for a vacation, or paying off a high-rate credit card.

Step 1: Follow the prompts in the Goals tab to create one or more financial goals.

Step 2: Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.

