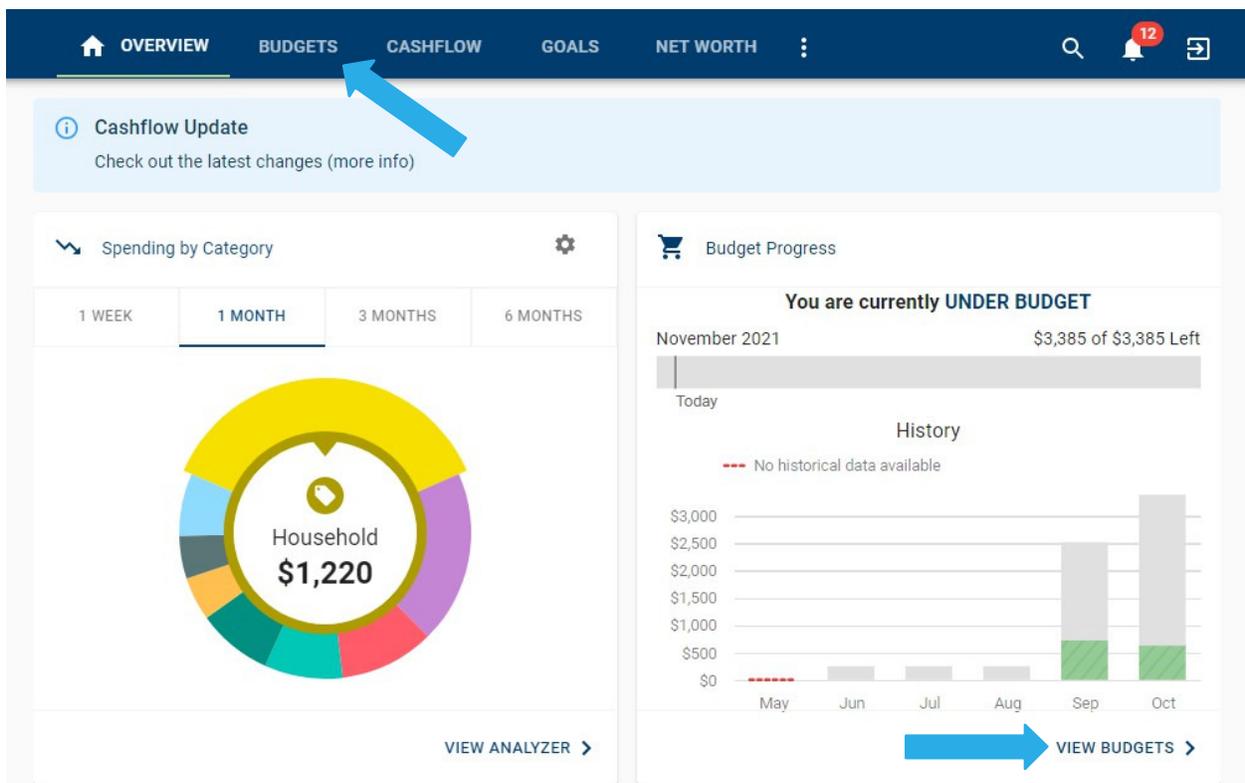


Insights

How to Add a Budget

Step 1: Navigate to *Insights* and select the *Budgets* button on your dashboard; or choose the *Budgets* tab on the toolbar.



Insights

Step 2: Click *Add Budget*.

The screenshot displays a budgeting application interface. At the top, a dark blue navigation bar contains the following menu items: OVERVIEW, BUDGETS (highlighted), CASHFLOW, GOALS, NET WORTH, a search icon, and a share icon. Below the navigation bar, the main content area is divided into two columns. The left column shows a monthly overview for November 2021, indicating the user is currently under budget. It lists several budget categories with their respective amounts and remaining balances: All Budgets (\$2,971 of \$2,985 Left), Appliances Budget (\$2,000 of \$2,000 Left), Baby Expenses Budget (\$200 of \$200 Left), Books Budget (\$50 of \$50 Left), Car/Travel (\$35 of \$35 Left), Clothes Budget (\$500 of \$500 Left), and Diningout Budget (\$186 of \$200 Left). The right column features a 'History' chart showing spending over the last eight months (May to Oct). The chart indicates that the user has been under budget by \$5,768 on all budgets over the last 8 months. Below the chart, there are two budget entries: 'Car/Travel' with an 'UPDATE' button and 'Personal' with a '+ CREATE' button. At the bottom right, there are two dark blue buttons: 'ADD BUDGET' and 'BUDGET ALERT'. A large blue arrow points to the 'ADD BUDGET' button.

← OCT November 2021 DEC ▶

You are currently UNDER BUDGET

All Budgets \$2,971 of \$2,985 Left

Today

- Appliances Budget \$2,000 of \$2,000 Left >
- Baby Expenses Budget \$200 of \$200 Left >
- Books Budget \$50 of \$50 Left >
- Car/Travel \$35 of \$35 Left >
- Clothes Budget \$500 of \$500 Left >
- Diningout Budget \$186 of \$200 Left >

History

--- No historical data available

Your total monthly Spending Budget is: **ON TRACK**

You've been under by **\$5,768** on all budgets over the last **8 months**.

Car/Travel **UPDATE** ×

You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.

Personal **+ CREATE** ×

You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

ADD BUDGET

BUDGET ALERT

The More You Know: The *Budgets* tab also allows you to view and modify existing Budgets. You can adjust the tag associated with each budget you've created, increase/decrease budget amounts, rename, and even delete a budget by clicking into the appropriate one.

Insights

Step 3: Complete steps 1-4 on the screen by choosing which tag to track, establishing the name and budget amount, enrolling in alerts, and selecting which accounts to use for tracking your budget.

← **OVERVIEW** **BUDGETS** CASHFLOW GOALS NET WORTH 🔍

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.
Have tags you don't use anymore? [Click Here](#) to delete your old tags.

<input type="checkbox"/> Auto Expense \$0	<input type="checkbox"/> Auto Repair \$0
<input type="checkbox"/> Auto Repairs \$0	<input type="checkbox"/> Auto Zone \$0

▼ SHOW MORE

NEXT

2 Choose the name & amount

3 Alert Setup

4 Choose accounts

Insights

Step 4: Click *Finish*.

← [OVERVIEW](#) **BUDGETS** [CASHFLOW](#) [GOALS](#) [NET WORTH](#) [SEARCH](#) [SHARE](#)

- ✓ Choose which tags to track
- ✓ Choose the name & amount
- ✓ Alert Setup
- 4** Choose accounts

Tagged transactions are linked to accounts and count towards your budget limit.

Car Loan 401(k) Fidelity Primary Savings American

[BACK](#) [FINISH](#)

Insights

Step 5: Use *Budget Insights* to help meet your financial targets. Insights allows you to easily adjust your plans by using spending history to provide suggestions for staying on track.

The screenshot displays a budgeting application interface. At the top, a navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area is for 'November 2021' and features a 'History' bar chart and a list of budget categories. A blue arrow points to the 'ON TRACK' status.

Navigation: OVERVIEW | BUDGETS | CASHFLOW | GOALS | NET WORTH

Month: OCT | November 2021 | DEC

Status: You are currently **UNDER BUDGET**

All Budgets: \$3,044 of \$3,085 Left

Budget Category	Spent	Left
Appliances Budget	\$2,000	\$2,000 Left
Baby Expenses Budget	\$200	\$200 Left
Books Budget	\$50	\$50 Left
Car/Travel	\$35	\$35 Left
Clothes Budget	\$500	\$500 Left
Diningout Budget	\$186	\$200 Left
Entertainment Budget	\$73	\$100 Left

History: No historical data available. Chart shows spending from May to Oct.

Summary: Your total monthly Spending Budget is: **ON TRACK**

You've been under by **\$5,768** on all budgets over the last **8 months**.

- Car/Travel:** You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.
- Personal:** You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

Buttons: ADD BUDGET, BUDGET ALERT

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