Insights

How to Add a Goal

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

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Step 2: Click *Add Goal*.

The More You Know: The *Goals* tab also allows you to view and modify existing Goals. You can rename, increase/decrease goal amounts, and even modify the accounts to track by clicking into the appropriate one.

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Step 3: Choose one of our suggested goal-types or click the *Custom Savings Goal* to create one of your own.

Step 4: Complete the following fields related to the *Goal* you are establishing. The *This account has [dollar amount]. Start tracking [dollar amount] towards my goal* field allows you to consider a dollar amount of your choosing already available in the account used to monitor your goal. If you would like to begin saving for this goal starting at $0, enter a zero in the dollar amount field. In the example below, the user's Primary Savings account has a current balance of $1,000.00. They are choosing to apply $500.00 of that $1,000.00 to their *Trip to Hawaii*.

Step 5: Click Save.

Note: Insights does not move money, it is a tool to suggest how to save to reach your goal.