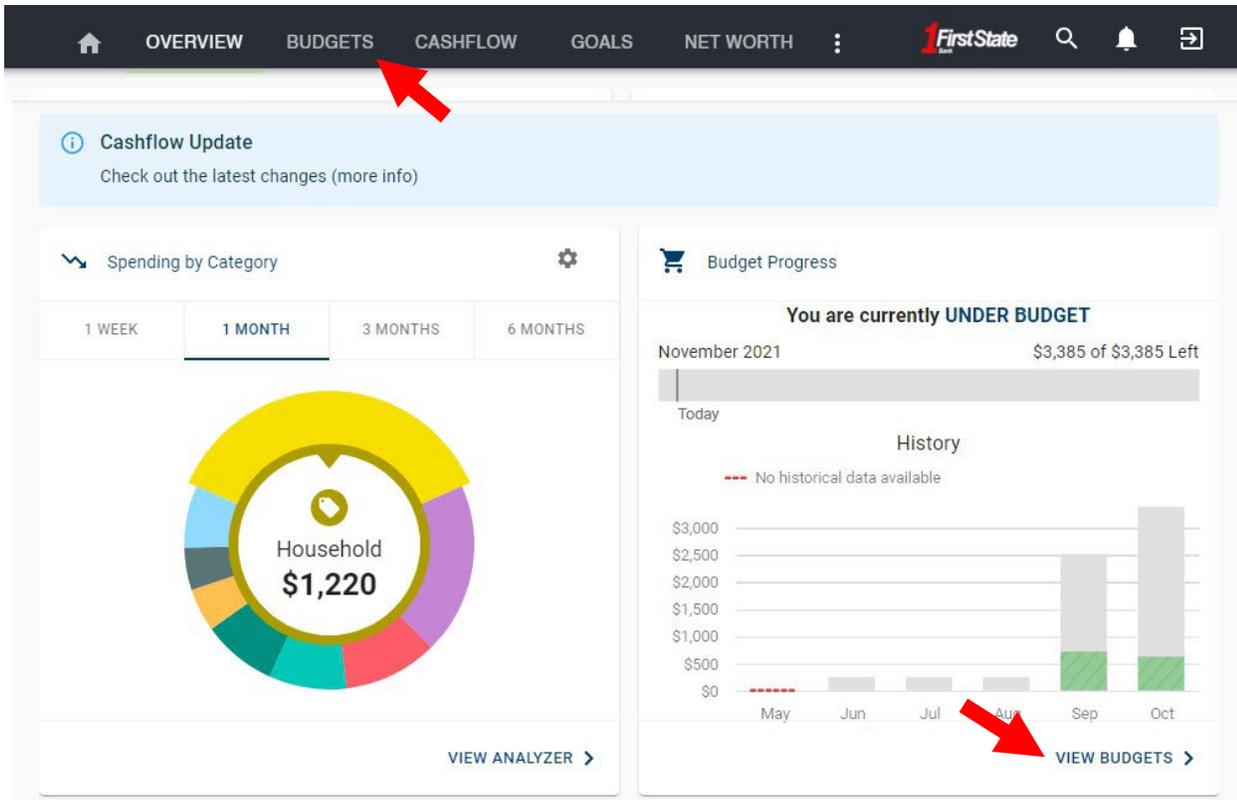


How to Add a Budget in Insights

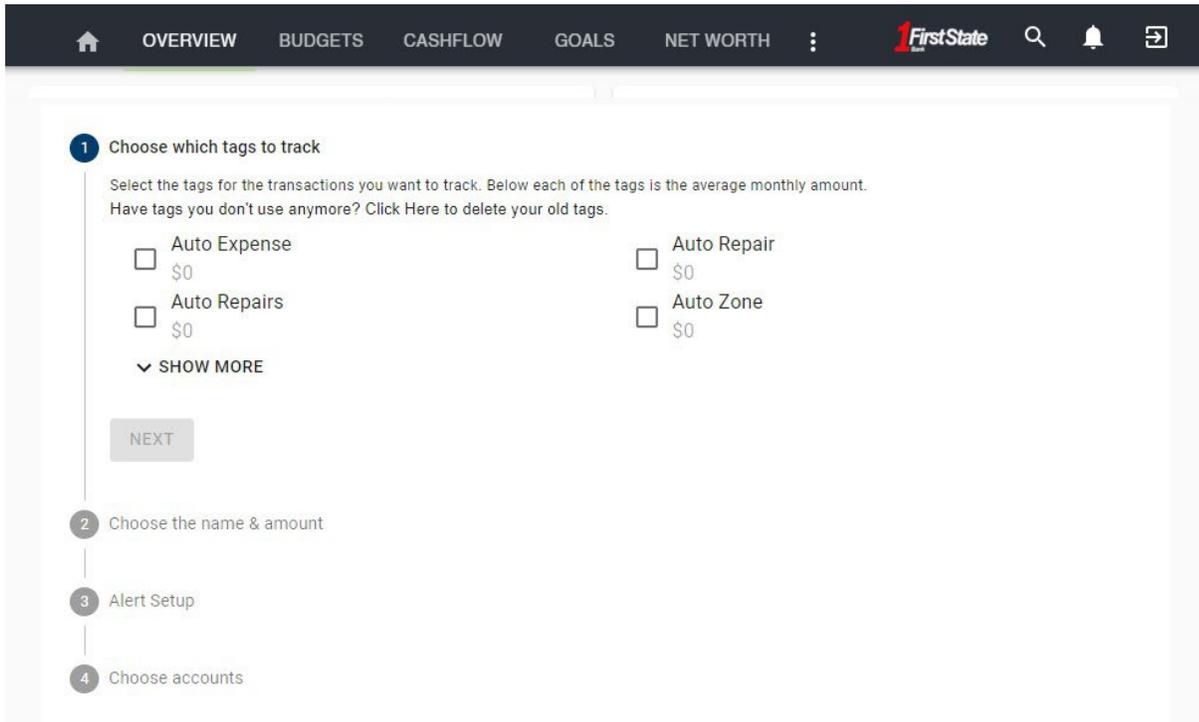
- 1) Navigate to Insights and select the “View Budgets” button on your dashboard, or choose the “Budgets” tab on the toolbar.



2) Click “Add Budget”.

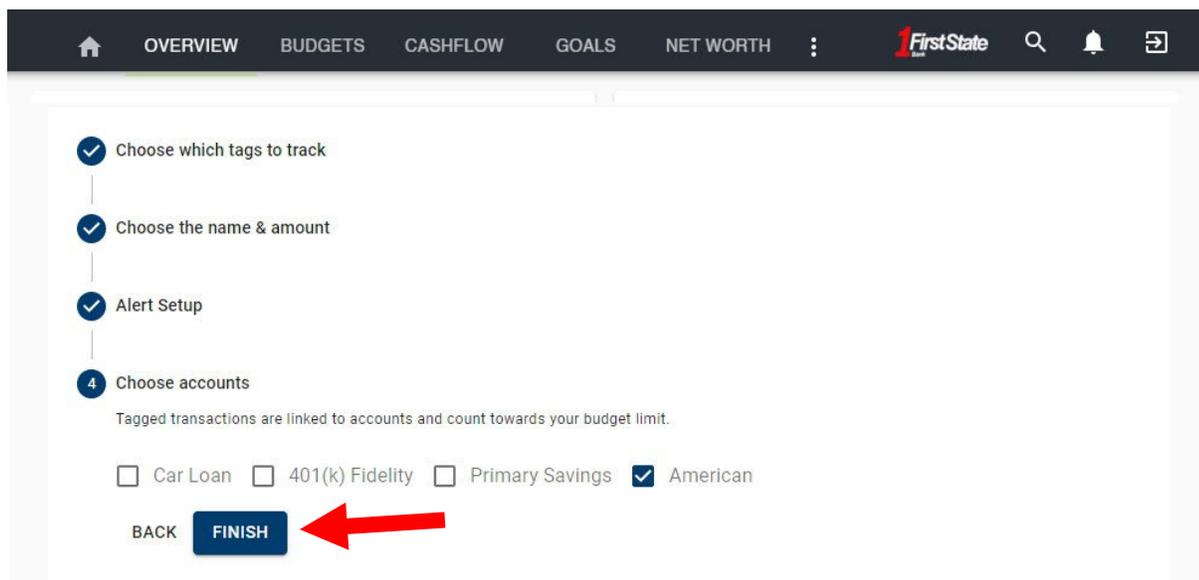
The More You Know: The “Budgets” tab also allows you to view and modify existing budgets. You can adjust the tag associated with each budget you’ve created, increase/decrease budget amounts, rename, and even delete a budget by clicking into the appropriate one.

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



The screenshot shows the 'Choose which tags to track' step of a budget setup process. The navigation bar at the top includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area has a progress indicator with four steps: 1. Choose which tags to track (active), 2. Choose the name & amount, 3. Alert Setup, and 4. Choose accounts. Below the progress indicator, there is a 'NEXT' button. The main area contains a list of tags with checkboxes and average monthly amounts: 'Auto Expense' (\$0), 'Auto Repairs' (\$0), 'Auto Repair' (\$0), and 'Auto Zone' (\$0). A 'SHOW MORE' link is also present.

4) Click “Finish”.



The screenshot shows the 'Choose accounts' step of the budget setup process. The navigation bar at the top is the same as in the previous screenshot. The progress indicator shows four steps, all of which are completed with checkmarks: 1. Choose which tags to track, 2. Choose the name & amount, 3. Alert Setup, and 4. Choose accounts (active). Below the progress indicator, there is a 'BACK' button and a 'FINISH' button. A red arrow points to the 'FINISH' button. The main area contains a list of accounts with checkboxes: 'Car Loan', '401(k) Fidelity', 'Primary Savings', and 'American' (checked). A note below the list states: 'Tagged transactions are linked to accounts and count towards your budget limit.'

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 the 'Budget Insights' dashboard for November 2021. At the top, the navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main header indicates the current month is November 2021 and states 'You are currently UNDER BUDGET'. Below this, a list of budgets is shown with their respective spending and remaining amounts:

- All Budgets: \$3,044 of \$3,085 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
- Diningout Budget: \$186 of \$200 Left
- Entertainment Budget: \$73 of \$100 Left

To the right, a 'History' bar chart shows spending from May to October. A red arrow points to the 'ON TRACK' status in the summary section, which states: 'Your total monthly Spending Budget is: **ON TRACK**'. Below this, it notes: 'You've been under by \$5,768 on all budgets over the last 8 months.' Specific budget details for 'Car/Travel' and 'Personal' are also provided, including the number of times under budget and the average amount spent.

At the bottom of the dashboard, there are two buttons: 'ADD BUDGET' and 'BUDGET ALERT'. A promotional banner for 'Home ownership can be more than just a dream' is also visible at the bottom left.