

# QUICK START GUIDE

## Dashboard

1. Add accounts from other financial institutions. Your primary CUSB accounts will automatically be added the first time you use Spending Habits Tools.
2. When you add accounts, your transactions and balances will update accordingly.
3. Your transactions will categorize themselves with 'tags'. To personalize these categories, select the transaction and edit the tag.

## Spending Targets

1. Navigate to the Budget tab to create Spending Targets.
2. Click the 'Add a new spending target' button and follow the prompts to begin to track your spending by category. Popular categories to track are groceries, dining out and household.

## Cashflow

1. Navigate to the Cashflow tab to see your projected day-to-day cash flow.
2. Add income & bills like your paycheck, rent or utilities to more accurately forecast your cash flow.

## Goals

1. Follow the prompts to the Goals tab to create one or more financial goals.
2. Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.

