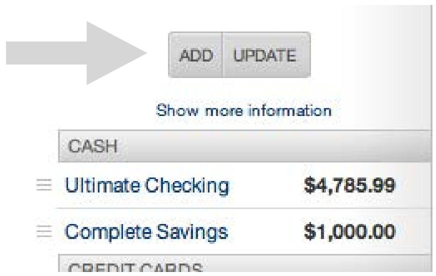
Dashboard

1. Add accounts from other financial institutions. Your primary accounts will already be added to this service.



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.

Budget

1. Navigate to the Budget tab to create Spending Targets and a monthly budget.

2. Complete the addition form to see your budget progress for the current month.

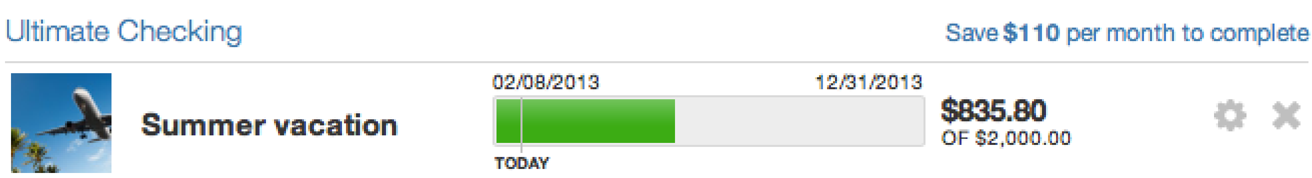
1/2015

Cashflow

1. Navigate to the Cashflow tab to see your monthly cashflow.
2. Add Incomes & Bills like your paycheck, rent or utilities to accurately forecast your daily cash flow.

Goals

1. Follow the final prompt to create a financial goal.
2. Select one of the available goal types to begin tracking your progress towards your objectives.



Congratulations!

You’ve completed the Quick Start set-up.
Now continue to explore and monitor your finances!