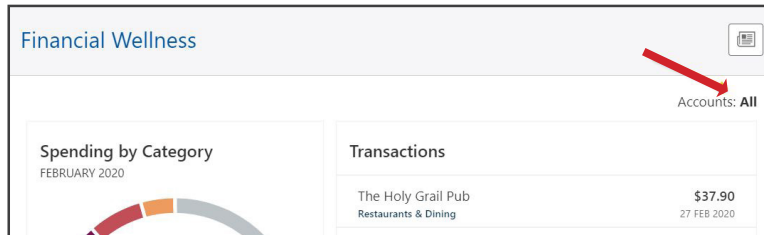


# FINANCIAL WELLNESS GUIDE

## Choosing Accounts

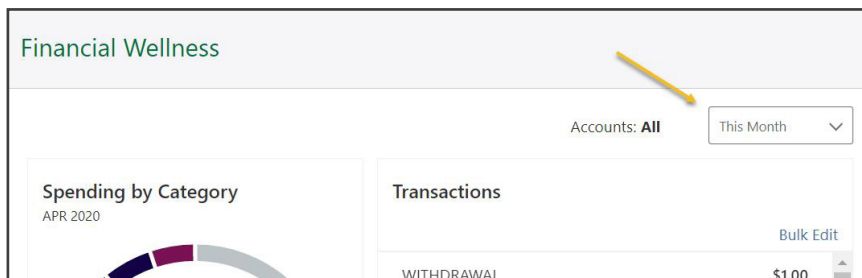
When you start using the Financial Wellness widget, all your accounts will be included by default. To select which accounts appear, click Accounts: or tap the filter icon.



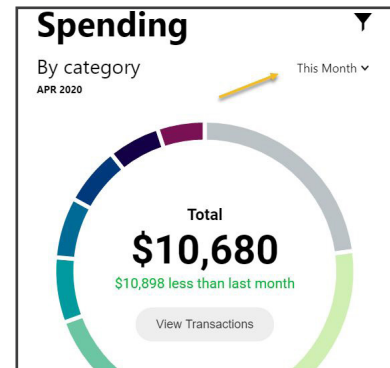
*Please note some transactions may be double-counted when all accounts are selected, such as those in a checking account linked to a savings account for overdraft protection. In that example, both payments and the transfers between accounts will appear in your total.*

## Selecting a Timeframe

The transactions you see by default will include those from the current calendar month. To change the timeframe, use the This Month dropdown menu.



Desktop

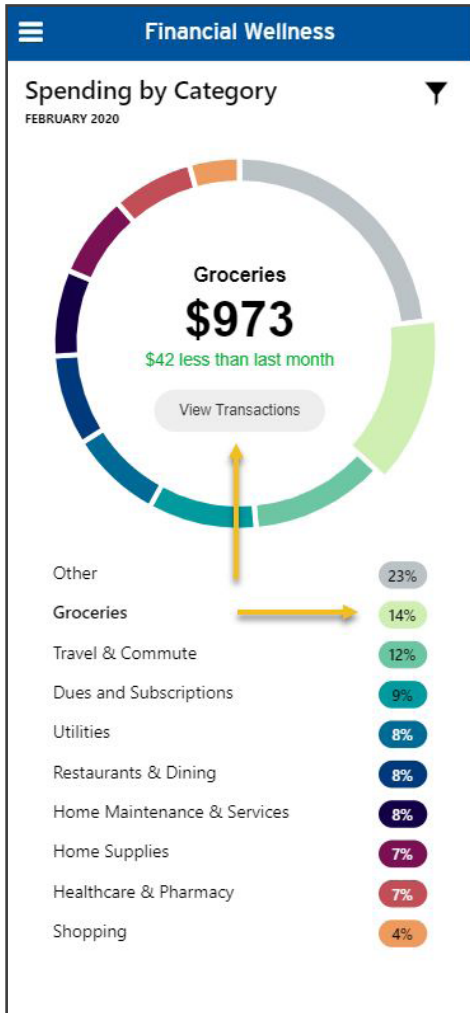


Mobile

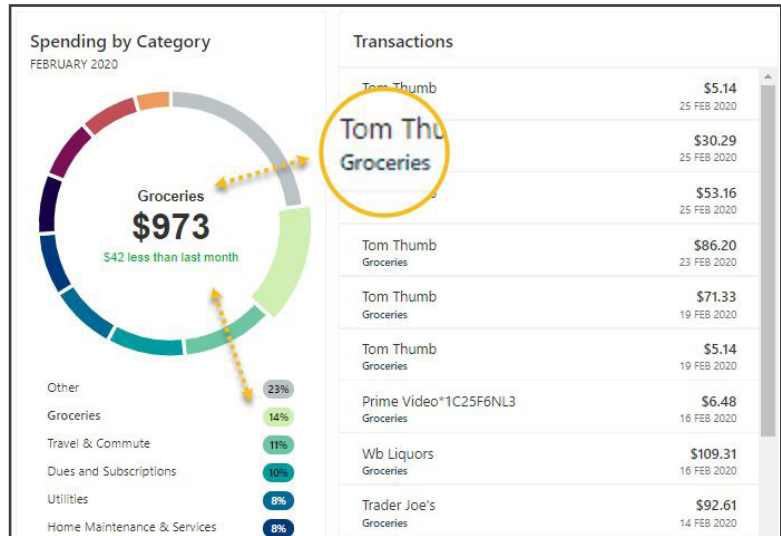
*Please note your pie chart may appear empty if it's the beginning of the month and you haven't made any transactions yet.*

## Using the Pie Chart

You can click or tap on each category name or wedge of the pie to see transactions counted in that category. Clicking or tapping again will return you to all transactions.



Mobile



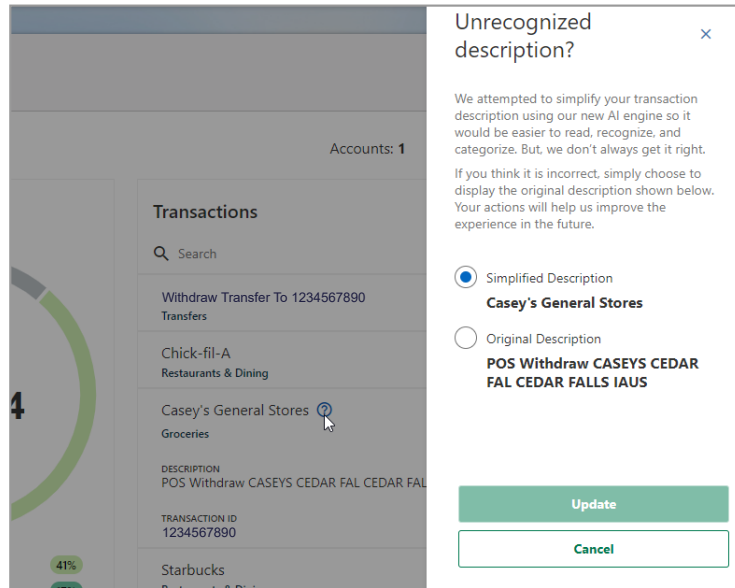
Desktop

## Searching for a Transaction

Type the term you're searching for next to the magnifying glass icon in the Transactions area.

## Updating Transaction Details

The Financial Wellness widget will try to simplify your transaction descriptions and assign categories on its own. If you'd like to change the description, click or tap on the transaction and then the question mark icon next to the description to change it back to the original.



To change a transaction to a different category, click or tap on the category label under the transaction. You can then choose a new category and also choose to have it applied to all future transactions with that same description. You can also click or tap on Bulk Edit to change the categories of different past transactions at the same time using the checkboxes that appear.

