FINANCIAL WELLNESS GUIDE

Choosing Accounts

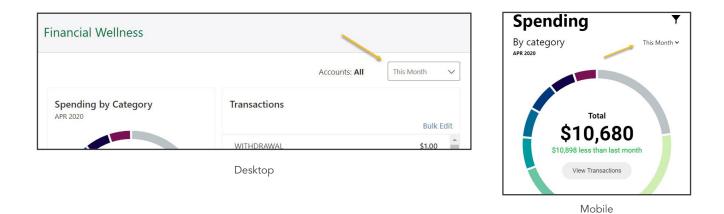
When you start using the Financial Wellness widget, all your accounts will be included by default. To select which accounts appear, click Accounts: or tap the filter icon.



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

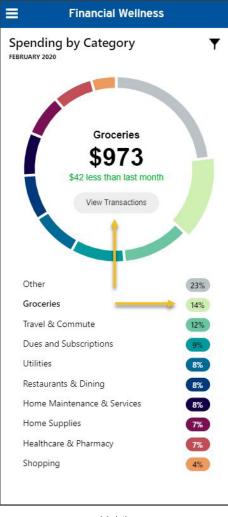
The transactions you see by default will include those from the current calendar month. To change the timeframe, use the This Month dropdown menu.



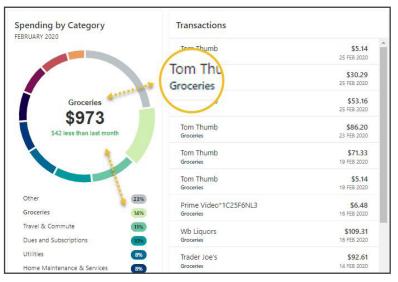
Please note your pie chart may appear empty if it's the beginning of the month and you haven't made any transactions yet.

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



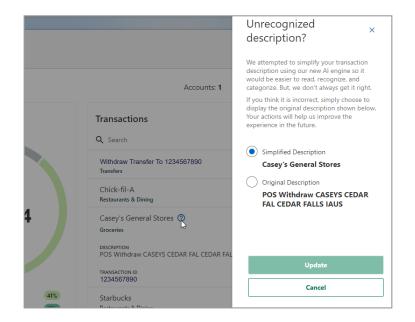
Desktop

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.

Accounts: All	Categorize Transaction ×	Financial Wellness			Bills & Subscriptions
Transactions Select All As:	🖚 Auto, Commute & Travel	Spending by Category	Transactions	This Month 🗸	Home Maintenance & Services Montgages Online Services Other Bills Rent Telephone Services Ublities
Payment to SquareTrade Insurance	Bills & Subscriptions Cable & Satellite Dues and Subscriptions Home Maintenance & Services Mortgages Online Services Other Bills Rent		Select All Assign (Culligan Online Services	Category Cancel \$40.71 21 APR 2020	Business Expenses
Payment to Minnesota Life Insurance C		\$3,575	AMERINATIONAL COPAYMENTS XX0420 Cable & Satellite	\$130.27 20 APR 2020	Cash & Transfers
Payment to Minnesota Life Insurance C			Payment to CenterPoint Energy Usilities Dairy Queen Restaurants & Dining	\$74.16 20 APR 2020 \$19.98	Family & Pets
Payment to SquareTrade	Telephone Services VUtilities		Restaurants & Dining Rapids Liquor Groceries	19 APR 2020 \$109.51 17 APR 2020	S Fees & Payments
Payment to GEICO	Business Expenses	Other 2005 Healthcare & Pharmacy 2255	Payment to Redbox Rent	\$1.93 17 APR 2020	Food, Dining & Entertainment
Payment to Ucare	😋 Cash & Transfers	Other Expenses IIII	Target Shopping	\$80.89 17 APR 2020	Save
		Groceries 9% Entertainment 8%	Payment to Pioneer Press Dues and Subscriptions	\$10.00 17 APR 2020	
Payment to Ucare Insurance		Credit Card Payments 05 Online Services 05	Payment to Redbox Rent Cub Foods	\$2.14 16 APR 2020 \$194.73	Cancel