How To

Get Started With MoneyTools

Getting the most out of MoneyTools does not require a lot of time. It takes just a few minutes to set up a few of the tools in MoneyTools to gain a better view of your financial situation.

Dashboard

1. Add accounts from other financial institutions. Your primary accounts will automatically be added to the first time you use MoneyTools.
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 transaction and edit the tag.

Spending Targets

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

Cashflow

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

Goals

1. Follow the prompts in 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.

Congratulations!

You've completed the Quick Start Set-Up. Now continue to explore and monitor your finances!