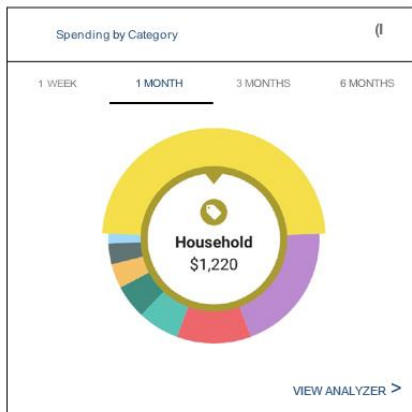


# Quick Start Guide



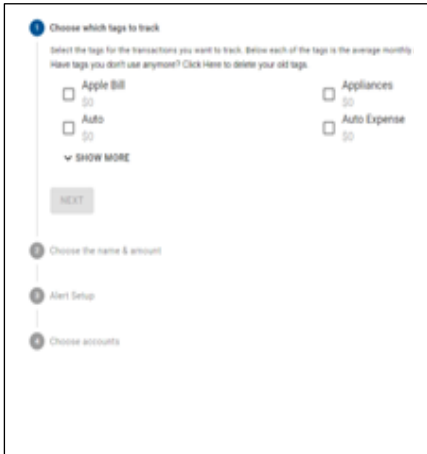
## Dashboard

See which spending category you have spent the most in so far this month.

Step 1: Select other parts of the wheel to see other major category spending. Your transactions will categorize themselves with 'tags'.

Step 2: To personalize these categories, or split the transaction between tags, select the transaction and edit the tag.

Step 3: When you select a transaction from the dashboard you can also change the name of the transaction, create a budget, or add a recurring transaction to your Cashflow Calendar.



This screen is titled "Choose which tags to track". It asks the user to select tags for transactions they want to track, with a note that the average monthly amount for each tag is shown below the tag name. The tags listed are: Apple Bill (\$0), Auto (\$0), Appliances (\$0), and Auto Expense (\$0). There is a "SHOW MORE" link and a "NEXT" button. Below the main content, there are four numbered steps: 1. Choose which tags to track, 2. Choose the name & amount, 3. Alert Setup, and 4. Choose accounts.

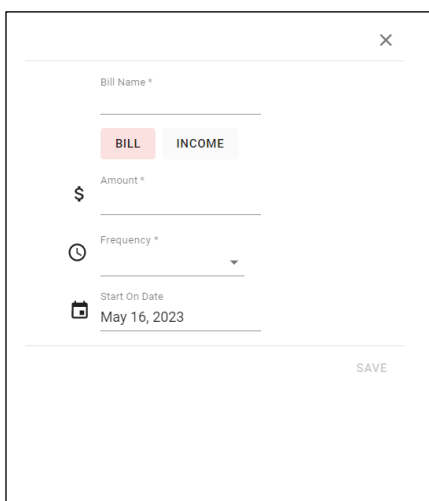
## Spending Targets

New users can look at the insights for guidance on what to budget based on spending.

Step 1: Navigate to Budgets and click on "View Budgets."

Step 2: Click "Add Budget."

Step 3: You can choose the name, amount, tags, and accounts associated with this Spending Target.



This is a form for adding a budget. It has a close button (X) in the top right corner. The fields are: "Bill Name \*" with a text input; "Amount \*" with a dollar sign icon and a text input; "Frequency \*" with a dropdown menu; and "Start On Date" with a calendar icon and the date "May 16, 2023". There are two buttons: "BILL" (highlighted in red) and "INCOME" (highlighted in grey). A "SAVE" button is at the bottom right.

## Cashflow

The cashflow calendar brings your budget to life through an interactive calendar.

Step 1: Navigate to Cashflow.

Step 2: Click the plus sign to add a "Bill" or "Income."

Step 3: Enter the required information and select "Save."

