

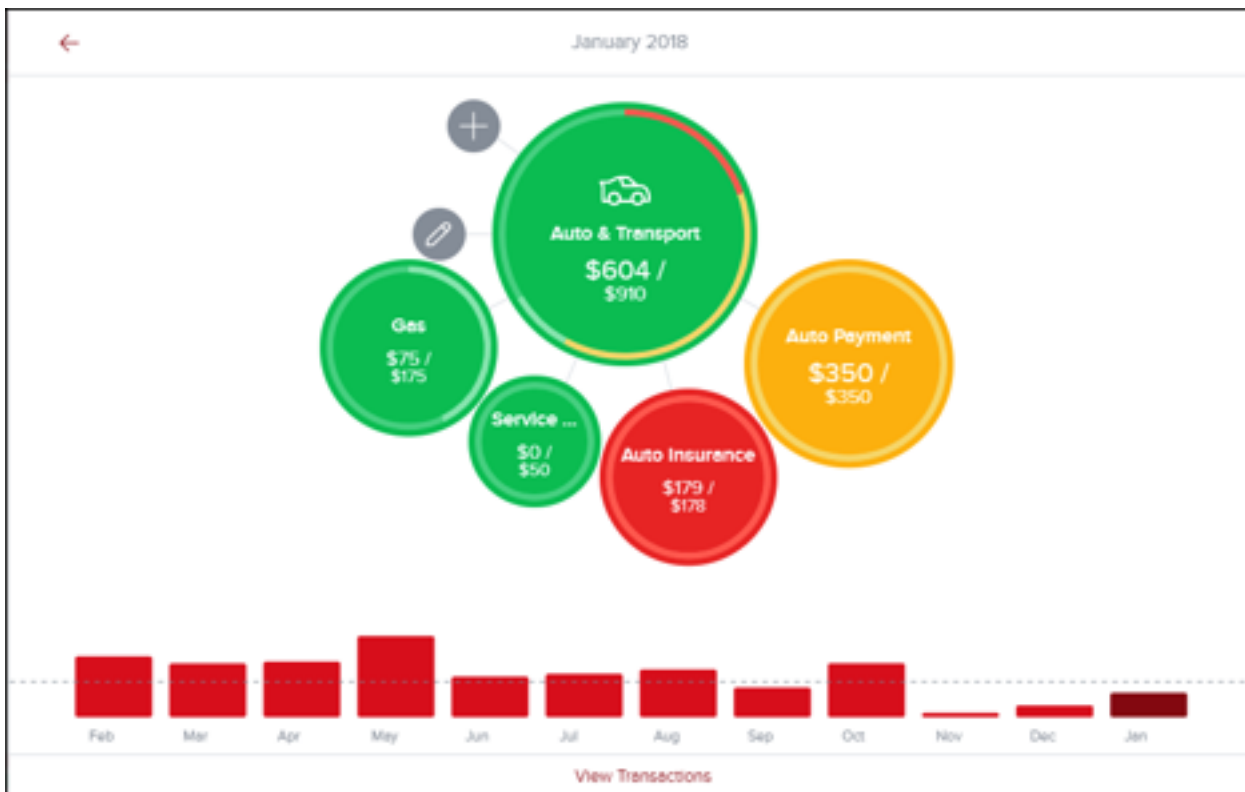
Overview

- Auto-generated budgets use averages from last 90 days of transactions – recommendation is to use the auto-generate option the first time you access Budgets
- **Green** = less than 80% of a budget is used.
- **Yellow** = more than 80% of a budget is used.
- **Red** = more than 100% of a budget is used.
- Bands around the edge of each bubble represent sub-budgets
- Upper left: Toggle between Bubbles view and List view with these 2 icons
- Top middle: Select a different month
- Upper right: Select “Manage Budgets” to add or remove items
- Lower left: Expand to see and edit projected income and amount unbudgeted
- Select a budget to edit it



Edit a Budget

- Select the budget item. Sub-budgets appear below the budget item
- Use the chart at the bottom to budget with your historical spending in mind. The dotted line in the chart shows the current budgeted amount.
- Select the Plus sign to add sub-budgets
- Select the Pencil icon to edit the budget amount or delete it
- Select a sub-budget to see details, edit its amount, or delete it. Note that the parent budget's amount won't decrease if you delete a sub-budget



Budgets in List View

- Detailed list of budgets and sub-budgets. Quickly make edits without the need to navigate in and out of the budget details window.
- Select a budget to make changes, including changing the amount, deleting it, and adding sub-budgets.
 - Selecting a budget displays a list of sub-budgets, along with the amount you've used.
 - Select the dollar amount in the right-hand column to change how much is allocated to a particular budget.
- A parent budget doesn't automatically decrease if you delete a sub-budget.
- Select the bubble icon to return to the bubble budgets view.

