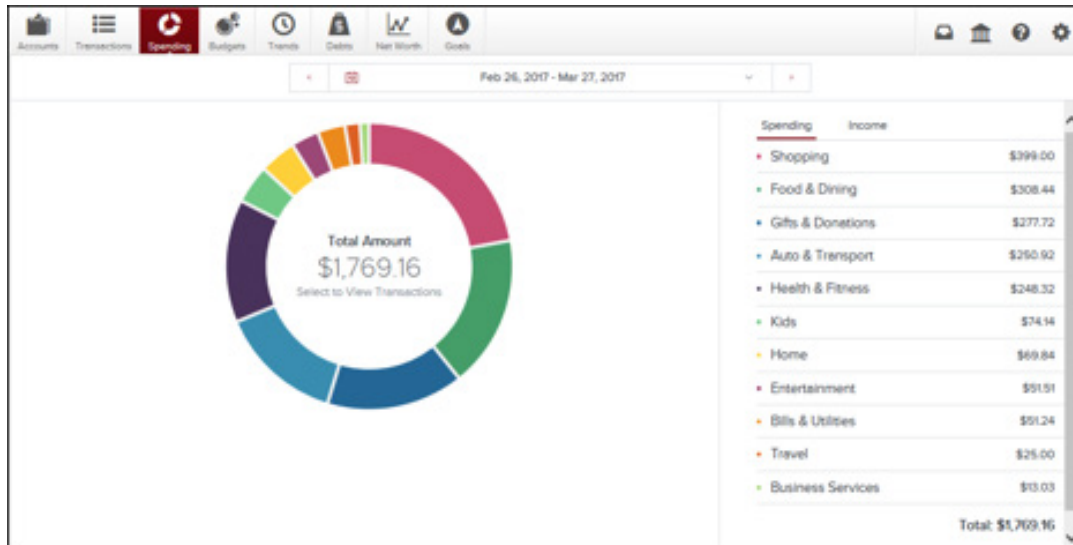


Overview

- Select the date from the top navigation bar.
- You can toggle between Spending and Income.
- Each color in the spending wheel corresponds with the categories listed in the table.
- Click a segment of the spending wheel to see subcategories. Click the center of the wheel to see specific transactions.



Not seeing all your categories?

- Check the Other category, which is a "catch all" in the spending view. Any category that represents less than 3 percent of total spending is represented in the Other category.
- Also, be sure your transactions are properly categorized. Our system effectively categorizes most transactions, but some slip through. If you categorize transactions, the system will learn your preferences.

Does a spending category seem off?

- Be sure your transactions are properly categorized. Our system effectively categorizes most transactions, but some slip through. If you categorize transactions, the system will learn your preferences.
- Note that certain credit transactions such as reimbursements are counted in the spending wheel.