MainStreetBank

How to Analyze Spending by Category in Insights

Spending by Category in Insights you can analyze and categorize your spending habits. For more information on how to manage your tags and categories, see our guide for **How to Manage Tags in Insights.**

01 Navigate to Spending by Category

- From your main dashboard, you will have two options to access Spending by Category
  - From your left navigation menu, click the **Insights** dropdown and select **Spending by category**, then on top of the dashboard click **Overview**
  - From your main dashboard, select the account you want to Analyze and click the **Insights** tile
- From the Insights dashboard, on the left-hand side, you will be able to view the Spending by Category card

02 Filter Accounts, Tags and Timeframe

- On the right-hand corner of the Spending by Category card, click the **Settings** icon
- In the Settings card, you have two tabs that can be filter:
  - **Accounts** – select the account(s) you want to analyze
  - **Tags** – select the tags you want to exclude from the dropdown list, then click **Save**
- To return to the Spending by Category card, in the top right-hand corner, click **X**
- In the Spending by Category card, to view your expenses for that period, select a **timeframe tab** (e.g., weeks, months, etc.)
- To get a complete breakdown of all the expenses, click **View Analyzer**

03 Analyze Spending by Category

- Analyze the graph to view the total expenses for each tag over the period that you chose. This will help you to uncover possibilities to change your spending habits.
- Use the calendar date at the top of the View Analyzer, or the sliding graph to alter the period you're looking for

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