

How to Add a Budget

Making a personal budget can seem overwhelming, Digital Banking can simplify the process to help you take control of your finances.

01 Navigate to Budgets

- On the main dashboard, you will have two options to access **Budgets**
 - From the left navigation menu, click the **Insights** dropdown and select **Budgets**
 - From your main dashboard, select the account you want to create a budget for and click the **Insights** tile. From the Insights dashboard top menu, click **Budgets**

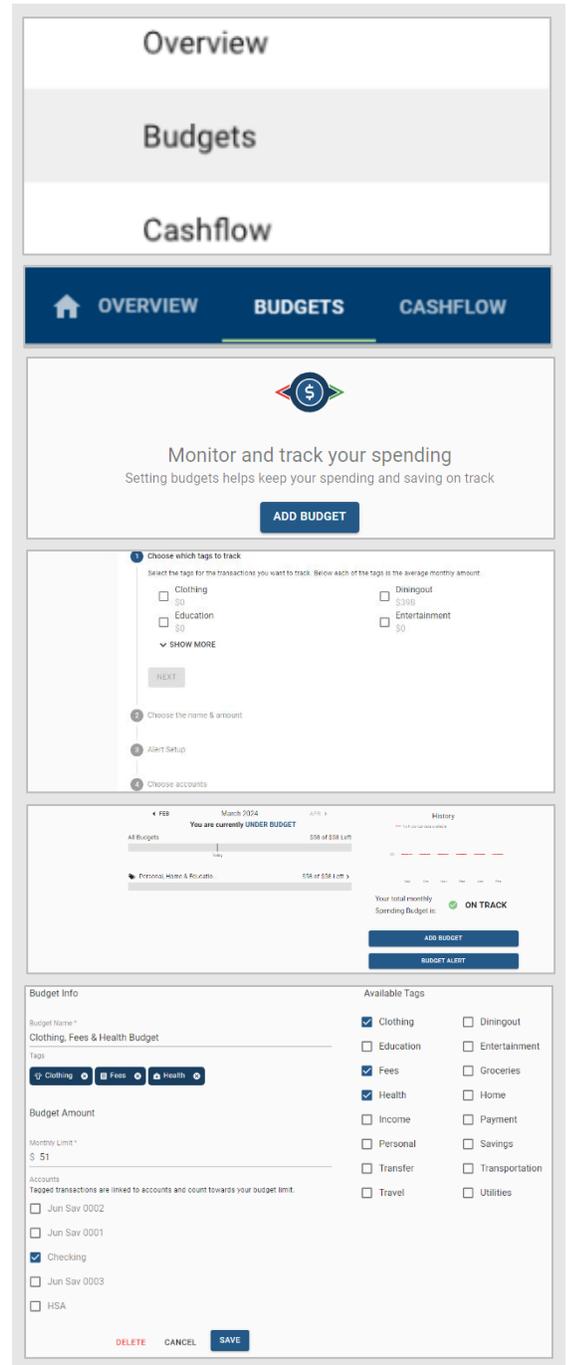
02 Add a New Budget

- In the Budgets Dashboard, click **ADD Budget**
- Complete your budget details:
 - Choose which tags to track
 - Choose the name & amount
 - Alert Setup
 - Choose Accounts
- Click **Finish**

03 Manage an Existing Budget

- Click on the Budget Name you want to manage
- Under the Data, Click **Edit Budget**
- You'll be able to update:
 - Budget Name
 - Budget Amount
 - Available Tags (Clothing, Dining out, Education.... etc.)
 - Delete a Budget
- Click **Save**

Use Budget Insights to help meet your financial targets. Insights allows you to easily adjust your plans by using spending history to provide suggestions for staying on track.



The screenshot displays the 'Budgets' section of the MainStreetBank digital banking interface. At the top, there are navigation tabs for 'OVERVIEW', 'BUDGETS', and 'CASHFLOW'. Below this, a central message reads 'Monitor and track your spending' with a sub-message 'Setting budgets helps keep your spending and saving on track' and an 'ADD BUDGET' button. The 'ADD BUDGET' process is shown in four steps: 1. 'Choose which tags to track' (with a list of tags like Clothing, Education, Dining out, Entertainment and their average monthly amounts), 2. 'Choose the name & amount', 3. 'Alert Setup', and 4. 'Choose accounts'. Below the steps, a progress bar shows 'All Budgets' and 'Personal, Water & Recreates' with their respective limits. A 'History' chart shows spending over time, and a status indicator shows 'ON TRACK'. The bottom section, 'Budget Info', shows details for a budget named 'Clothing, Fees & Health Budget', including tags (Clothing, Fees, Health), a budget amount of \$51, and a list of accounts (Jun Sav 0002, Jun Sav 0001, Checking, Jun Sav 0003, HSA) with checkboxes to select them. Buttons for 'DELETE', 'CANCEL', and 'SAVE' are at the bottom.