MainStreetBank

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**
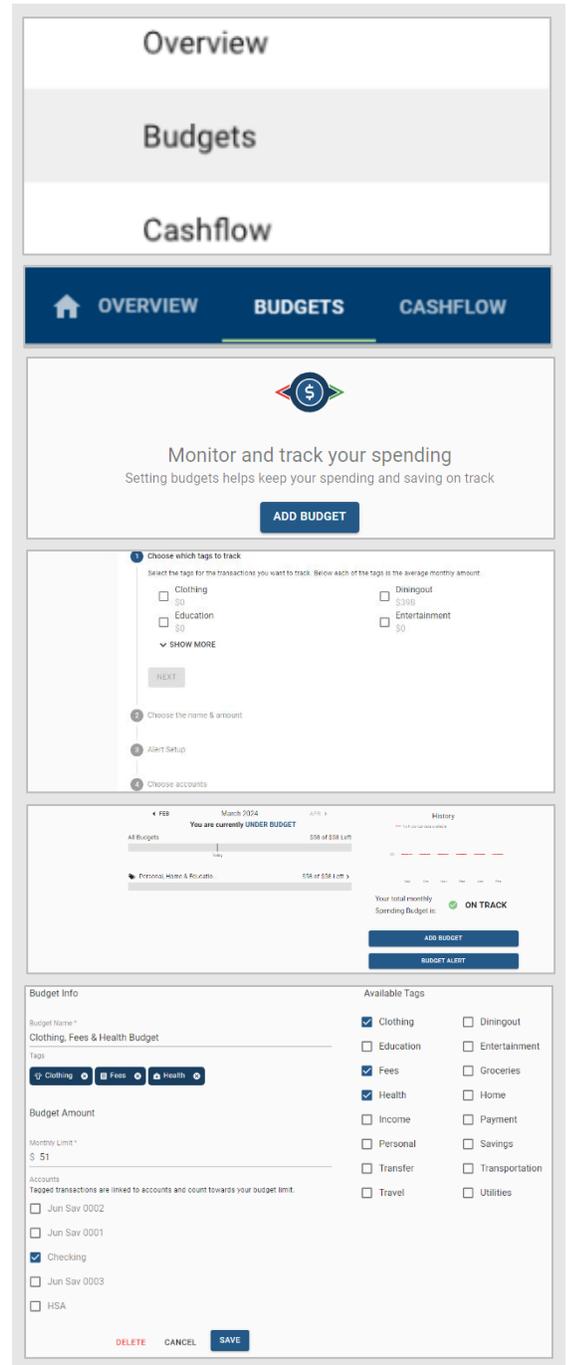
02 Add a New Budget

- 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.