

How to Add Goals

We often have the same financial goals, whether it's saving for a first house, or paying a student loan. Digital Banking provides the availability to set those goals.

01 Navigate to Insights

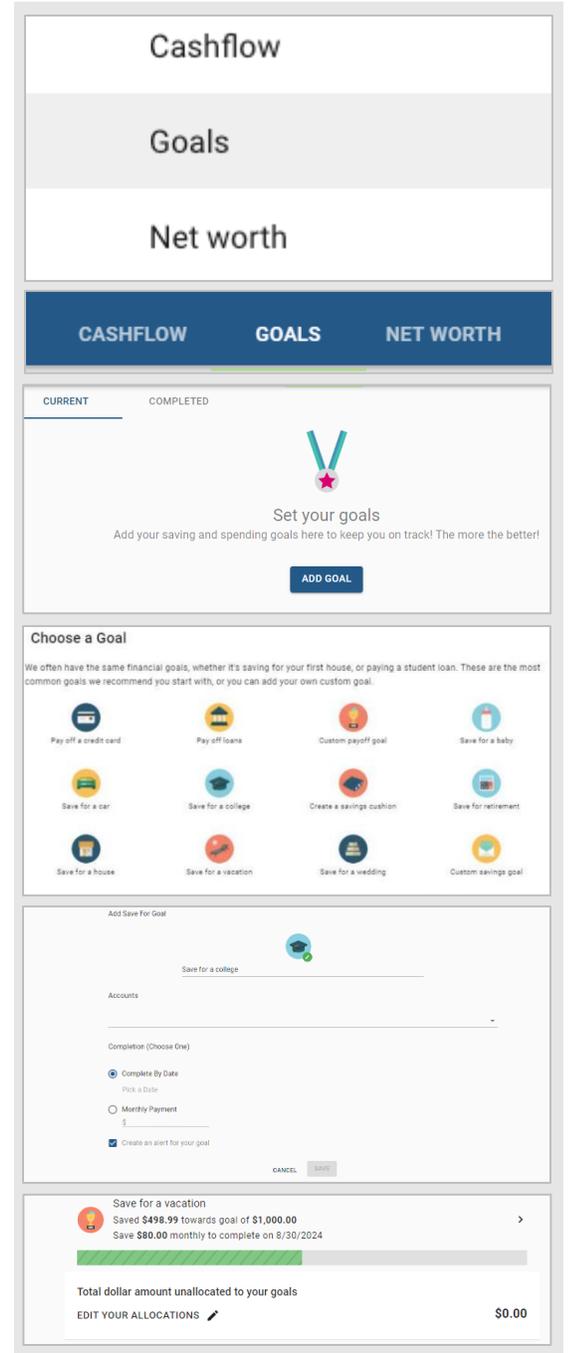
- On the main dashboard, you will have two options to access **Goals**
 - From the left navigation menu, click the **Insights** dropdown and select **Goals**
 - From your main dashboard, select the account you want to create a budget for and click the **Insights** tile. From the Insights dashboard top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

02 Add a New Goal

- In the Goals dashboard, click Add **Goal**
- Click a suggested Goal or click the **Custom Saving Goal** to create one of your own
- Complete the following fields for the related Goal that is being established:
 - Account(s)
 - Amount you want to save
 - Completion (Choose a Completed by Date)
 - Optional: Create an alert for your goal
- Click **Save**

03 Manage an Existing Goal

- To make updates or to delete an existing Goal, click the Actual Goal
- You will be able to update:
 - Amount you want to save
 - Complete By Date
- Click **Save**
- If the **Account** needs to be updated, click **Delete**
- Refer to Step 2 to set a New Goal with the Account change



The screenshot displays the 'Goals' section of the MainStreetBank digital banking interface. At the top, there are three main categories: 'Cashflow', 'Goals', and 'Net worth'. Below these, there are sub-sections for 'CASHFLOW', 'GOALS', and 'NET WORTH'. The 'GOALS' section is currently selected, showing a 'CURRENT' and 'COMPLETED' status. A large 'V' icon with a star is displayed, with the text 'Set your goals' and 'Add your saving and spending goals here to keep you on track! The more the better!'. A blue 'ADD GOAL' button is visible.

Below this, there is a 'Choose a Goal' section with a grid of 12 goal suggestions, each with an icon and a label: 'Pay off a credit card', 'Pay off loans', 'Custom payoff goal', 'Save for a baby', 'Save for a car', 'Save for a college', 'Create a savings cushion', 'Save for retirement', 'Save for a house', 'Save for a vacation', 'Save for a wedding', and 'Custom savings goal'.

The 'Add Save for Goal' section shows a detailed view of the 'Save for a college' goal. It includes a progress bar, a list of accounts, and options for completion: 'Complete By Date' (selected), 'Monthly Payment', and 'Create an alert for your goal'. The 'Save for a vacation' goal is also visible, showing a progress bar and a 'Save \$80.00 monthly to complete on 8/30/2024' message.