MainStreetBank

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.
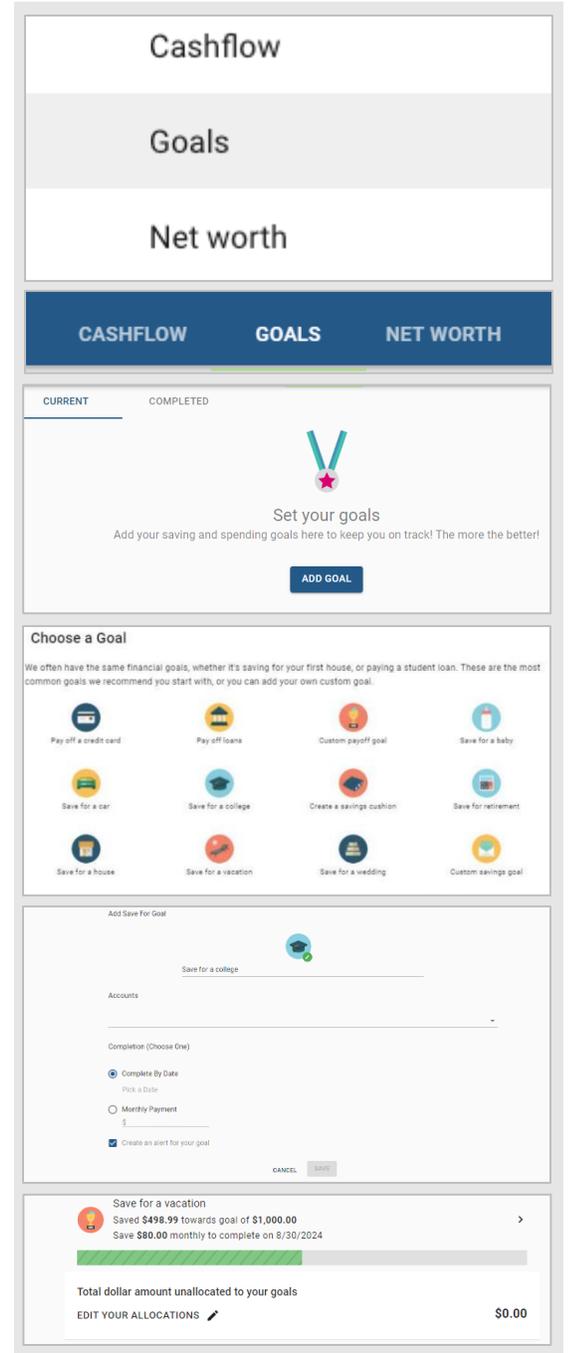
01 Navigate to Insights

- 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