



My Budget Quick Start Guide

Welcome to NEW My Budget with updated features
& functionality!



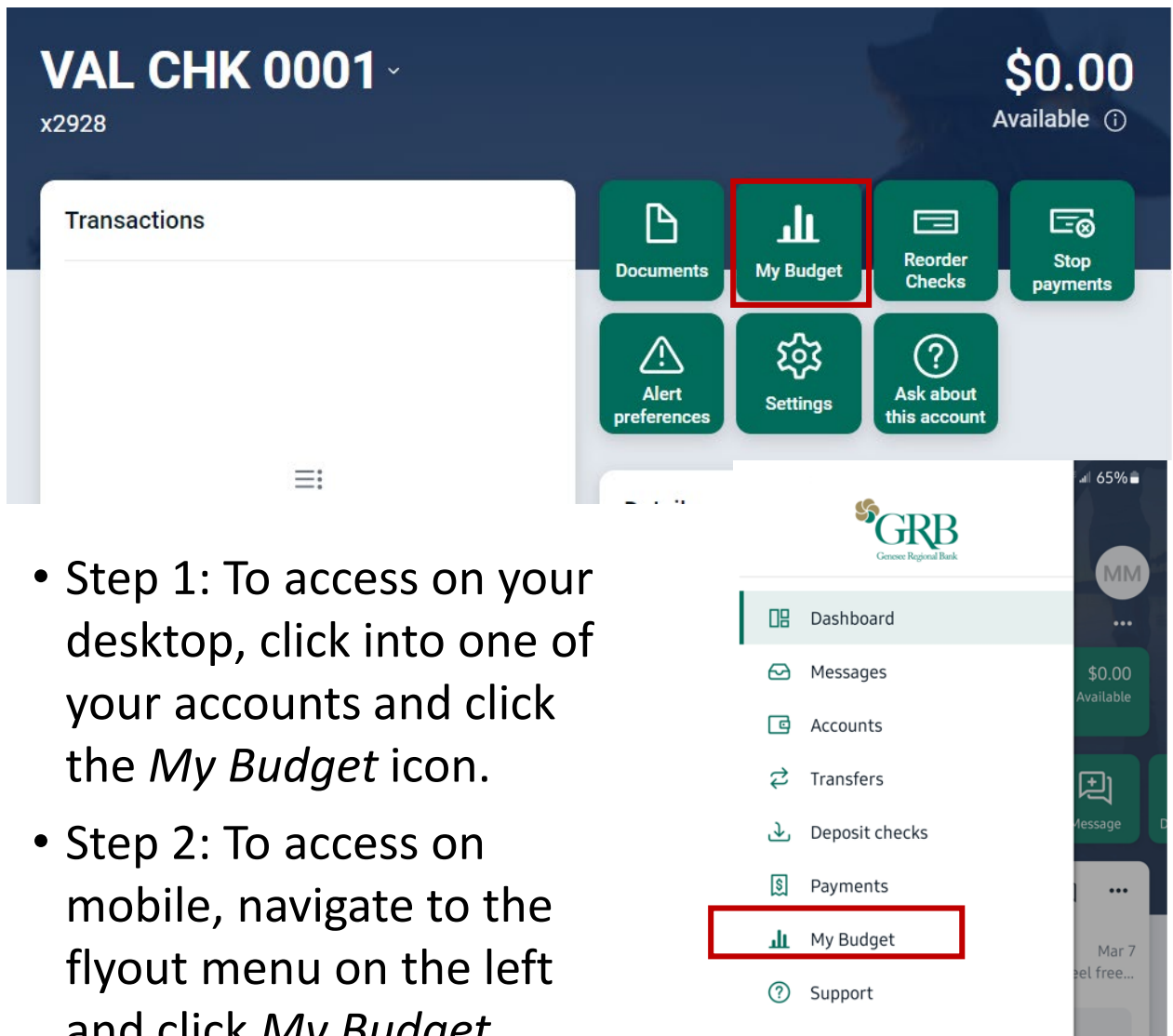
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Accessing My Budget

- Track spending, set budgets and goals, manage your cash flow, and get a snapshot of your entire financial picture, by combining information and transactions from all of your financial accounts, both inside and outside of GRB.

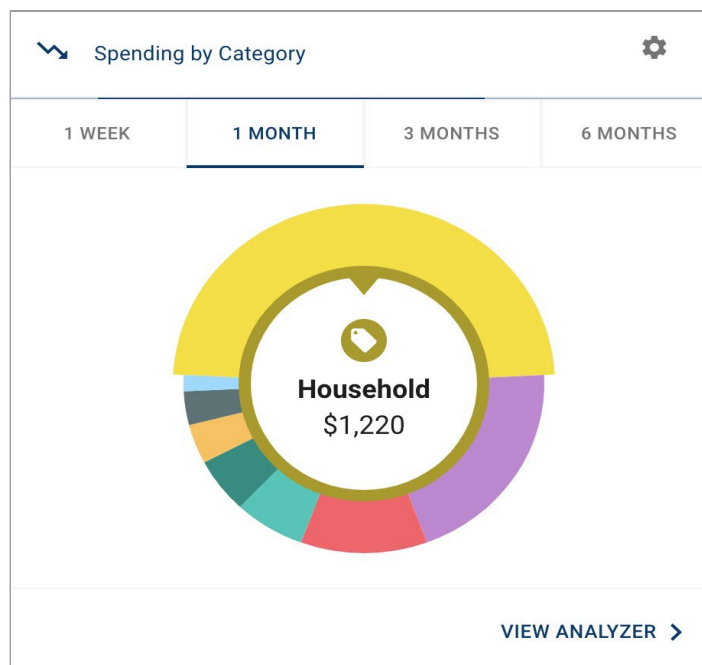


The screenshot displays the mobile app interface for a Genesee Regional Bank account. At the top, the account number 'VAL CHK 0001' and 'x2928' are visible on the left, and the balance '\$0.00 Available' is on the right. Below the account information, there is a 'Transactions' section on the left and a grid of action buttons on the right. The 'My Budget' button, which features a bar chart icon, is highlighted with a red border. Other buttons include 'Documents', 'Reorder Checks', 'Stop payments', 'Alert preferences', 'Settings', and 'Ask about this account'. Below the main interface, a flyout menu is shown, listing various app features: 'Dashboard', 'Messages', 'Accounts', 'Transfers', 'Deposit checks', 'Payments', 'My Budget' (highlighted with a red border), and 'Support'. The Genesee Regional Bank logo is visible at the top of the flyout menu.

- Step 1: To access on your desktop, click into one of your accounts and click the *My Budget* icon.
- Step 2: To access on mobile, navigate to the flyout menu on the left and click *My Budget*



Dashboard



- See which spending category you have spent the most in so far this month.
- Step 1: Select other parts of the wheel to see other major category spending. Your transactions will categorize themselves with 'tags'.
- Step 2: To personalize these categories, or split the transaction between tags, select the transaction and edit the tag.
- Step 3: When you select a transaction from the dashboard you can also change the name of the transaction, create a budget or add a recurring transaction to your Cashflow Calendar.



Spending Targets

New Budget

1 Choose which tags to track

Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.

Appliances \$0

Auto \$0

Auto Expense \$0

Baby Expenses \$0

▼ SHOW MORE

NEXT

2 Choose the name & amount

3 Choose accounts

- Spending Targets

- New users can look at the insights for guidance on what to budget based on spending.
- Step 1: Navigate to Budgets and click on “View Budgets.”
- Step 2: Click on the Spending Target you’d like to edit from the list.
- Step 3: Click “Edit Budget” to edit or delete.
- Step 4: You can change the name, amount, tags, and accounts associated with this Spending Target from here.



Cash Flow

← Create An Income

Income Info

Name *

Example: Paycheck, Tips, Social Security

Amount *

\$ 0.00

Frequency

Start On Date

Apr 29, 2019

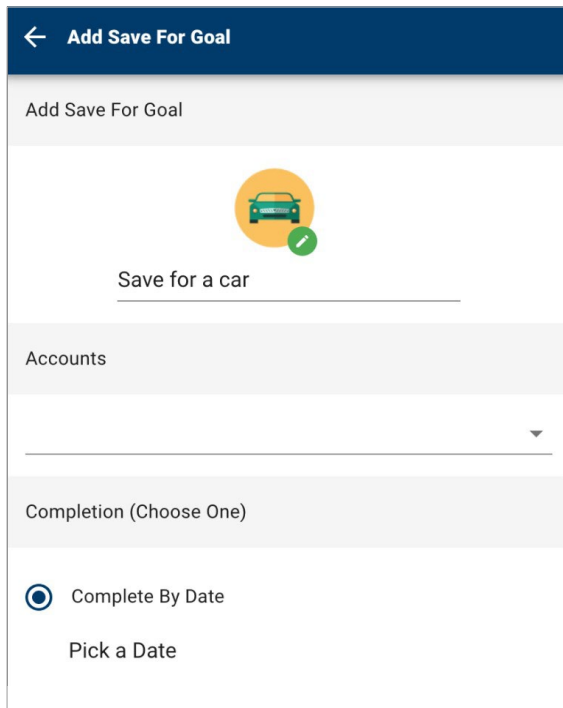
SAVE

CANCEL

- The cash flow calendar brings your budget to life through an interactive calendar.
- Step 1: Navigate to Cashflow.
- Step 2: Click the plus sign to “Add Income” or “Add Bill.”
- Step 3: Enter in the required information and select “Save.”



Goals



← Add Save For Goal

Add Save For Goal

Save for a car

Accounts

Completion (Choose One)

Complete By Date

Pick a Date

- Create savings goals, like saving for a vacation, or a debt reduction goal, like paying off a high-rate credit card.

- Step 1: Navigate to Goals, and select “Add Goal.”
- Step 2: Select your desired pay off or savings goal.
- Step 3: Fill in the required information.
- Step 4: Click “Save” to complete the process of adding a new goal.
- Keep in mind, your Goal Summary will update your completion date and the amount needed per month according to your preferences. Goals will automatically update your progress and will reflect your day-to-day account balances in My Budget.



Add an Account

← Link Account

Add an account

Choose from the following financial institutions or search by name below.

Don't see your financial institution above? Search for it here.

Name

SEARCH

Still can't find what you're looking for?

[CONTACT SUPPORT FOR ASSISTANCE](#)

- Syncing other accounts for a complete financial picture is simple.
 - Step 1: Navigate to Accounts, and click the plus sign to “Add Linked Account.”
 - Step 2: Select an institution or use the search to find your institution.
 - Step 3: Enter in the required information and select “Connect.”
 - You’ll receive a notification on your My Budget dashboard once the account has been synced successfully.

