

MoneyTracker

Mobile Quick Start Guide



GETTING THE MOST out of West Shore Bank's MoneyTracker does not require a lot of time. It takes just a few minutes to set up a few of the tools to gain a better view of your financial situation.

Dashboard

1. At the top of the screen you can see which spending category you have spent the most in so far this month. Select other parts of the wheel to see other major category spending.
2. Your transactions will categorize themselves with 'tags'. To personalize these categories, or split the transaction between tags, select the transaction and edit the tag.
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

1. Navigate to the Budget tab to create Spending Targets and begin tracking spending by category.
2. Complete the addition form to see your spending compared to your target. Popular categories to track are groceries, dining out and household.

Cashflow

1. Navigate to the Cashflow tab to see your projected day-to-day cash flow.
2. Add Incomes & Bills like your paycheck, rent or utilities to more accurately forecast your daily cash flow.

Goals

1. Follow the prompts in the Goals tab to create one or more financial goals.
2. Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.

Congratulations! You've completed the Quick Start set-up. Now continue to explore and monitor your finances!



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