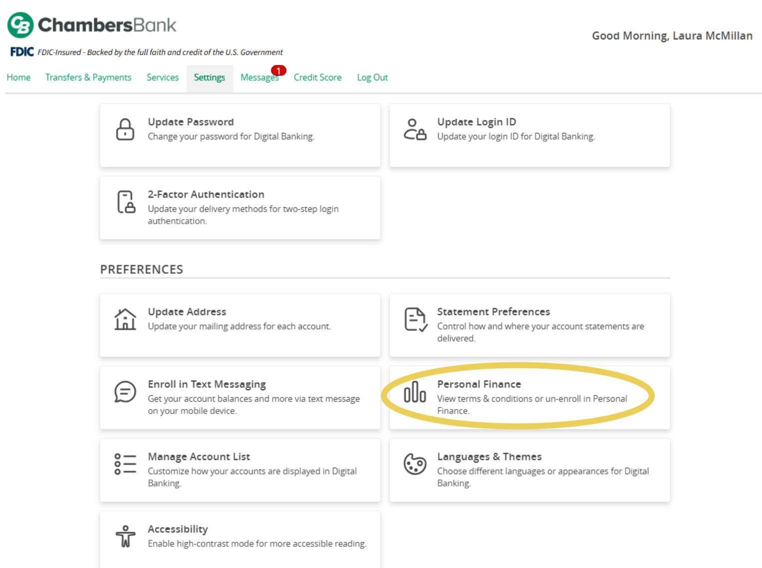
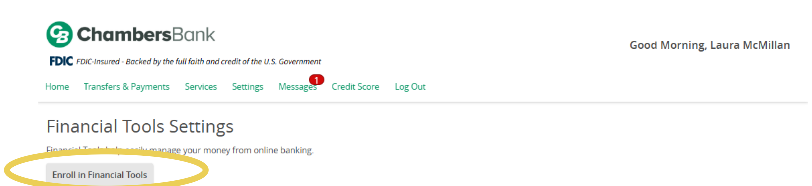
# HOW TO USE PERSONAL FINANCE

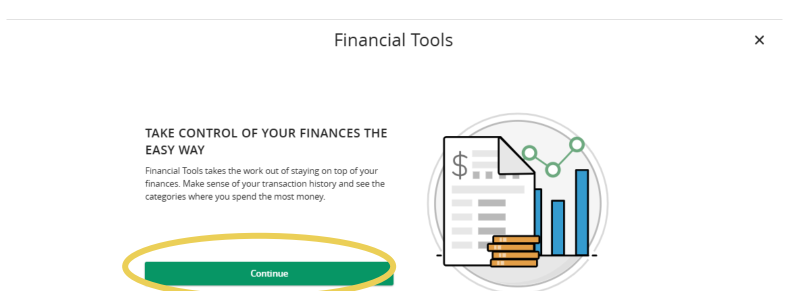
- Settings > Preferences > Personal Finance



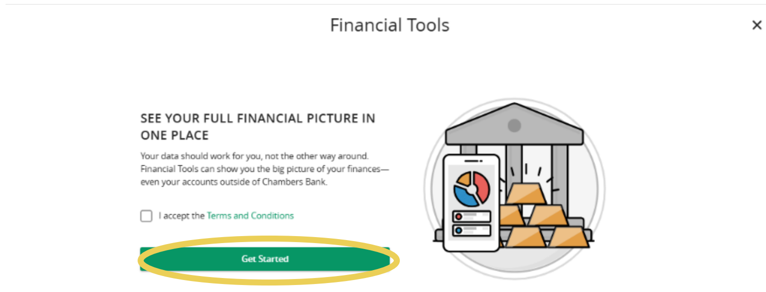

- Click Enroll in Financial Tools



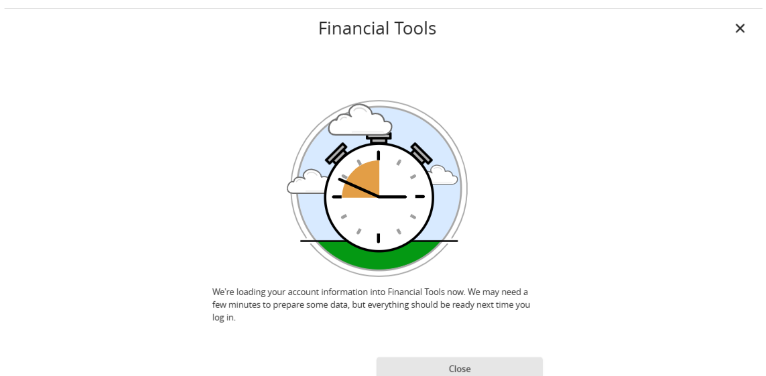

- Click "Continue"



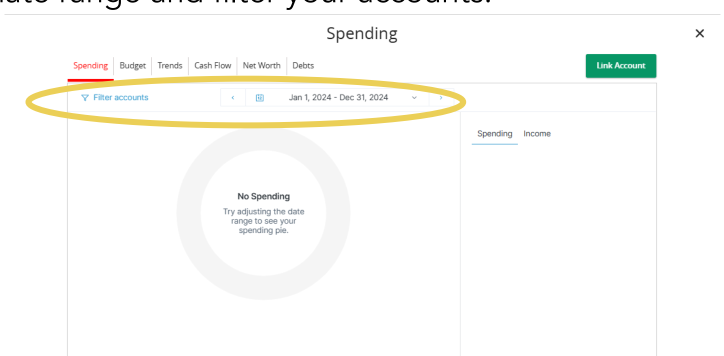
- Accept the terms and click “Getting Started”



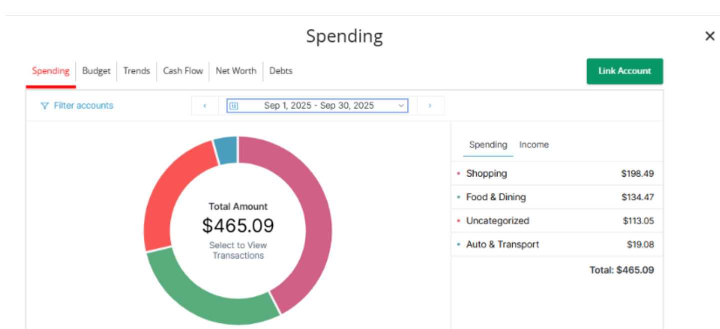

- It may take a few minutes to load



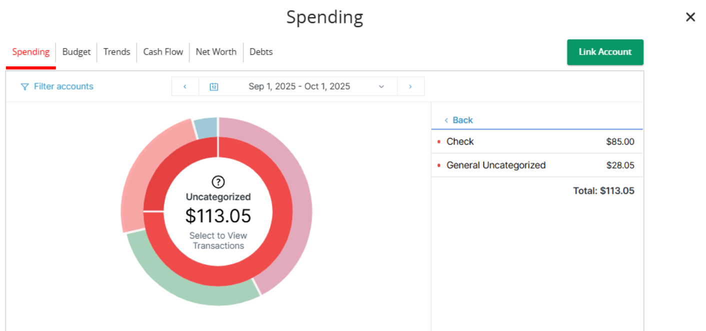

- Set your date range and filter your accounts.



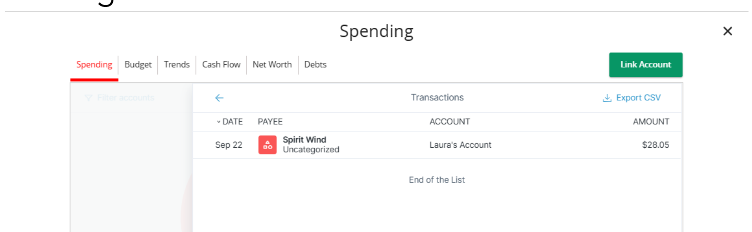

- Once the date is selected, it will automatically update your information.



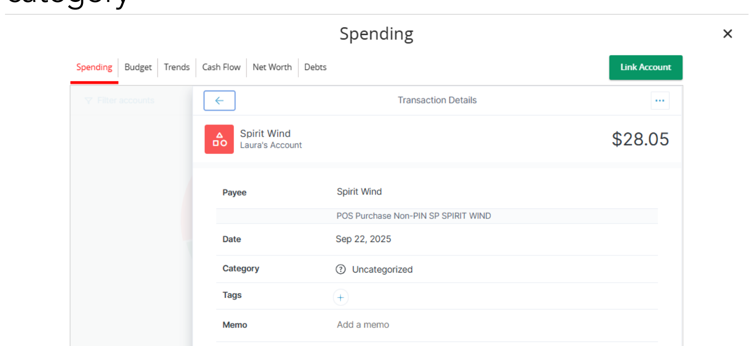
- If you have anything that needs to be categorized, click uncategorized on the right-hand side of the screen.



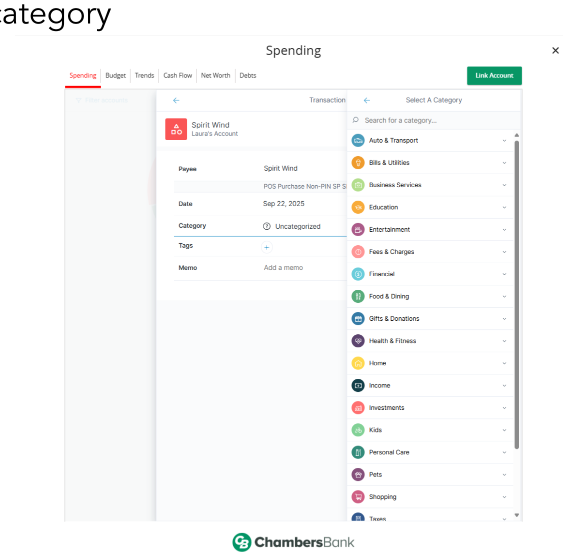

- Double click to go into the transaction.



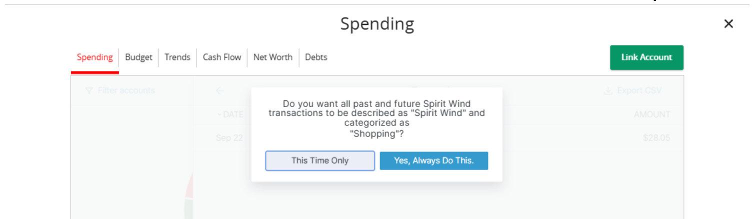

- Click the category




- Then select a category



- You will be asked if you want all future transactions for this company to be categorized as the category you selected, then back out to get to the spending home page.




- Once you log out of personal finance after enrolling, it will be located on your dashboard.