

## How to Add a Budget

**Step 1:** Navigate to *PFM* and select the *View Budgets* button on your dashboard; or choose the *Budgets* tab on the toolbar.

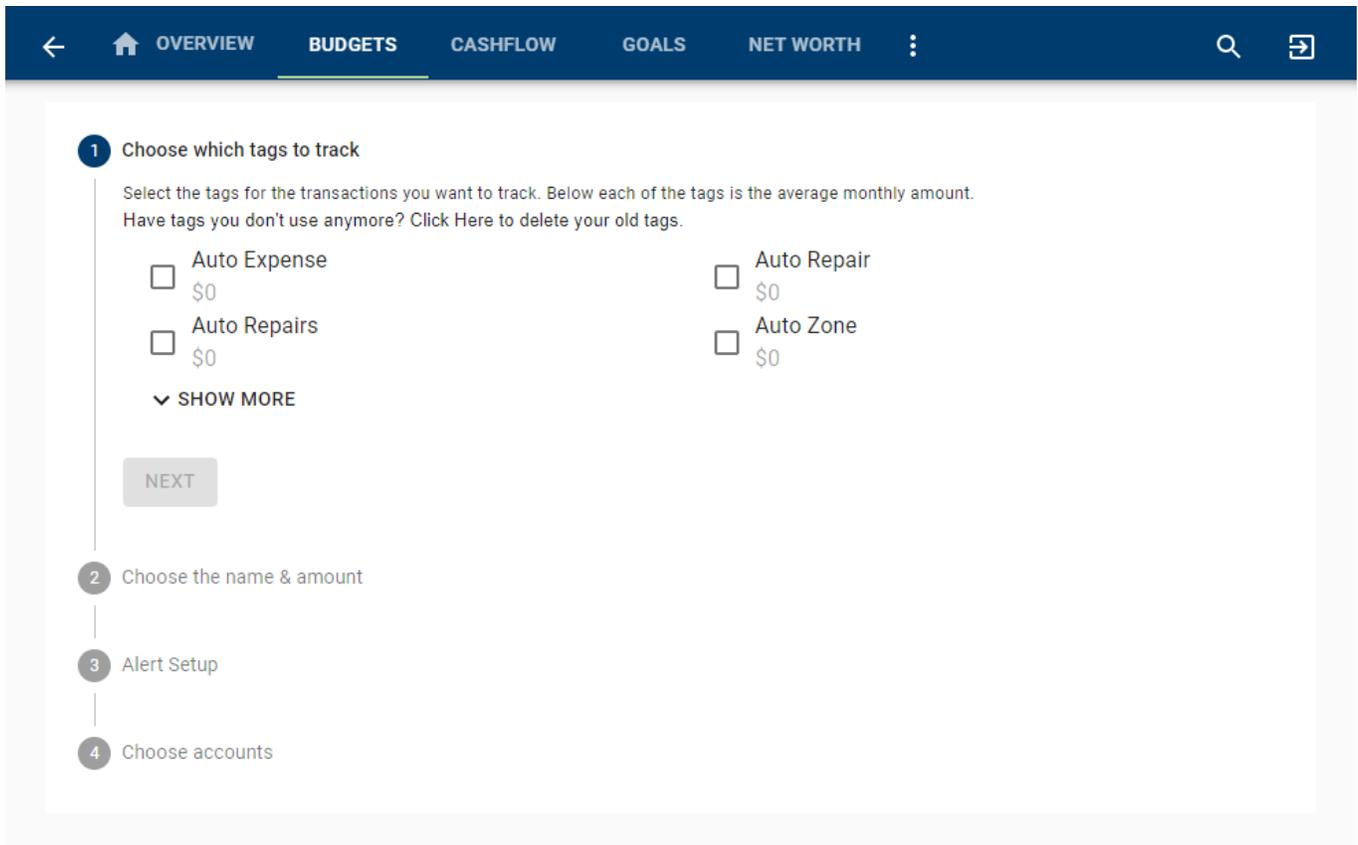
The screenshot shows the Geezeo dashboard interface. At the top, a dark blue navigation bar contains the following tabs: OVERVIEW, BUDGETS (highlighted with a blue arrow), CASHFLOW, GOALS, and NET WORTH. To the right of the navigation bar are icons for search, notifications (12), and a share icon. Below the navigation bar, there is a light blue notification banner for 'Cashflow Update' with a link to 'Check out the latest changes (more info)'. The main dashboard area is divided into two columns. The left column features a 'Spending by Category' section with a donut chart showing a household total of \$1,220. The right column features a 'Budget Progress' section for November 2021, indicating the user is 'currently UNDER BUDGET' with \$3,385 of \$3,385 left. A bar chart shows spending history for May through October, with a note that no historical data is available for May through August. A blue arrow points to the 'VIEW BUDGETS' button at the bottom right of the budget progress section.

Step 2: Click *Add Budget*.

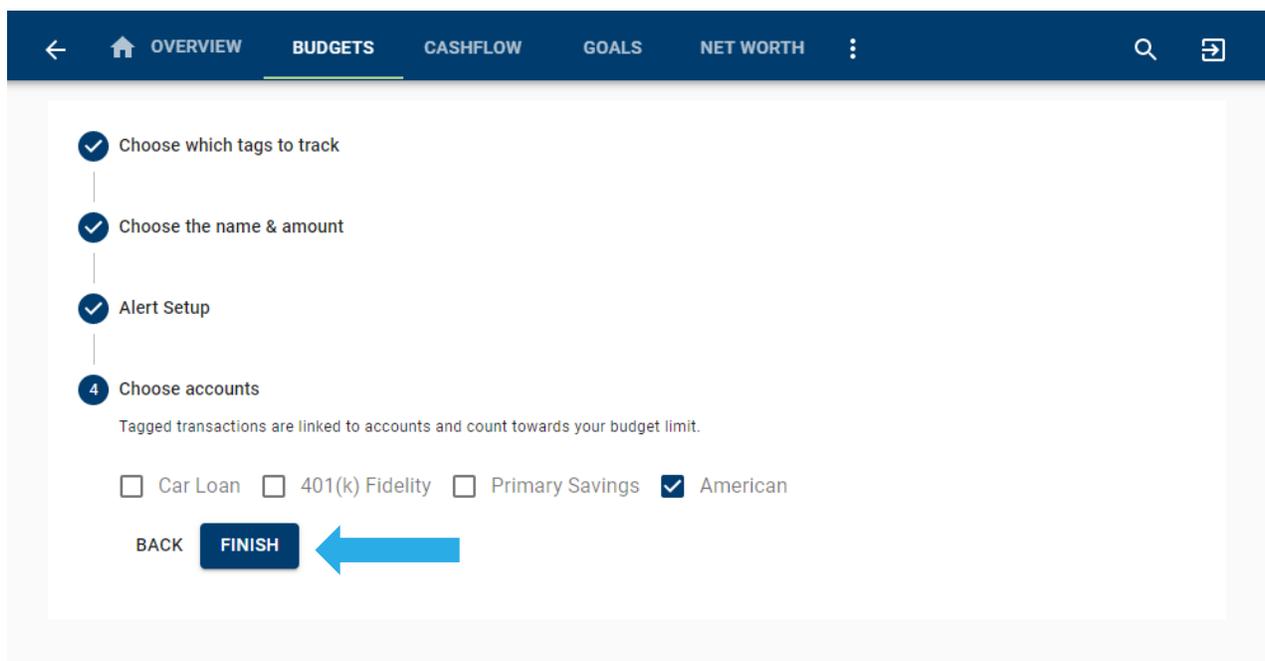
The screenshot shows the 'BUDGETS' tab in a financial management application. The navigation bar at the top includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area is for 'November 2021' and displays a status of 'You are currently UNDER BUDGET'. A list of budgets is shown with progress bars and remaining amounts: 'All Budgets' (\$2,971 of \$2,985 Left), 'Appliances Budget' (\$2,000 of \$2,000 Left), 'Baby Expenses Budget' (\$200 of \$200 Left), 'Books Budget' (\$50 of \$50 Left), 'Car/Travel' (\$35 of \$35 Left), 'Clothes Budget' (\$500 of \$500 Left), and 'Diningout Budget' (\$186 of \$200 Left). A 'History' bar chart shows spending from May to October, with a note 'No historical data available'. A summary section states 'Your total monthly Spending Budget is: ON TRACK' and provides details for the 'Car/Travel' budget, noting it has been under 5 times in the last 5 months by an average of \$207. At the bottom, there are two buttons: 'ADD BUDGET' and 'BUDGET ALERT'. A blue arrow points to the 'ADD BUDGET' button. An advertisement for home ownership is visible at the bottom left.

The More You Know: The *Budgets* tab also allows you to view and modify existing Budgets. You can adjust the tag associated with each budget you've created, increase/decrease budget amounts, rename, and even delete a budget by clicking into the appropriate one.

**Step 3:** Complete steps 1-4 on the screen by choosing which tag to track, establishing the name and budget amount, enrolling in alerts, and selecting which accounts to use for tracking your budget.



**Step 4:** Click *Finish*.



**Step 5:** Use *Budget Insights* to help meet your financial targets. Insights allows you to easily adjust your plans by using spending history to provide suggestions for staying on track.

The screenshot displays a budgeting application interface. At the top, there is a navigation bar with options: OVERVIEW, BUDGETS (selected), CASHFLOW, GOALS, and NET WORTH. The main content area shows the current month as November 2021, with navigation for October and December. A prominent message states "You are currently UNDER BUDGET". Below this, a list of budget categories is shown with progress bars and remaining amounts:

- All Budgets: \$3,044 of \$3,085 Left
- Appliances Budget: \$2,000 of \$2,000 Left
- Baby Expenses Budget: \$200 of \$200 Left
- Books Budget: \$50 of \$50 Left
- Car/Travel: \$35 of \$35 Left
- Clothes Budget: \$500 of \$500 Left
- Diningout Budget: \$186 of \$200 Left
- Entertainment Budget: \$73 of \$100 Left

On the right side, there is a "History" bar chart showing spending from May to October. A note indicates "No historical data available" for May. The chart shows spending starting in September, with a significant increase in October. Below the chart, a summary states: "Your total monthly Spending Budget is: **ON TRACK**". A blue arrow points to this status. Further down, it notes: "You've been under by \$5,768 on all budgets over the last 8 months." Below this, there are sections for "Car/Travel" (5 times under by \$207) and "Personal" (average of \$0).

At the bottom right, there are two buttons: "ADD BUDGET" and "BUDGET ALERT". At the bottom center, there is a promotional banner for "Home ownership can be more than just a dream" with a "Mortgages" button.