

## 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 spending of \$1,220. The right column features a 'Budget Progress' section for November 2021, indicating that the user is currently UNDER BUDGET with \$3,385 of \$3,385 left. A bar chart shows the budget history for the month, with a blue arrow pointing to a 'VIEW BUDGETS' button at the bottom right.

Step 2: Click *Add Budget*.

The screenshot displays the 'BUDGETS' tab in a financial application for November 2021. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area shows a summary: 'You are currently UNDER BUDGET' with '\$2,971 of \$2,985 Left'. Below this is a list of budgets: 'All Budgets', 'Appliances Budget', 'Baby Expenses Budget', 'Books Budget', 'Car/Travel', 'Clothes Budget', and 'Diningout Budget'. To the right, a 'History' bar chart shows spending from May to October. Below the chart, a summary states: 'Your total monthly Spending Budget is: ON TRACK'. It also notes: 'You've been under by \$5,768 on all budgets over the last 8 months.' Two budget categories are highlighted: 'Car/Travel' (5 times under in 5 months) and 'Personal' (average of \$0 spent). At the bottom, there are two buttons: 'ADD BUDGET' and 'BUDGET ALERT'. A blue arrow points to the 'ADD BUDGET' button.

Navigation: OVERVIEW | **BUDGETS** | CASHFLOW | GOALS | NET WORTH

Month: OCT | November 2021 | DEC

**You are currently UNDER BUDGET**

All Budgets: \$2,971 of \$2,985 Left

Today

- 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

History: No historical data available

Your total monthly Spending Budget is: **ON TRACK**

You've been under by **\$5,768** on all budgets over the last **8 months**.

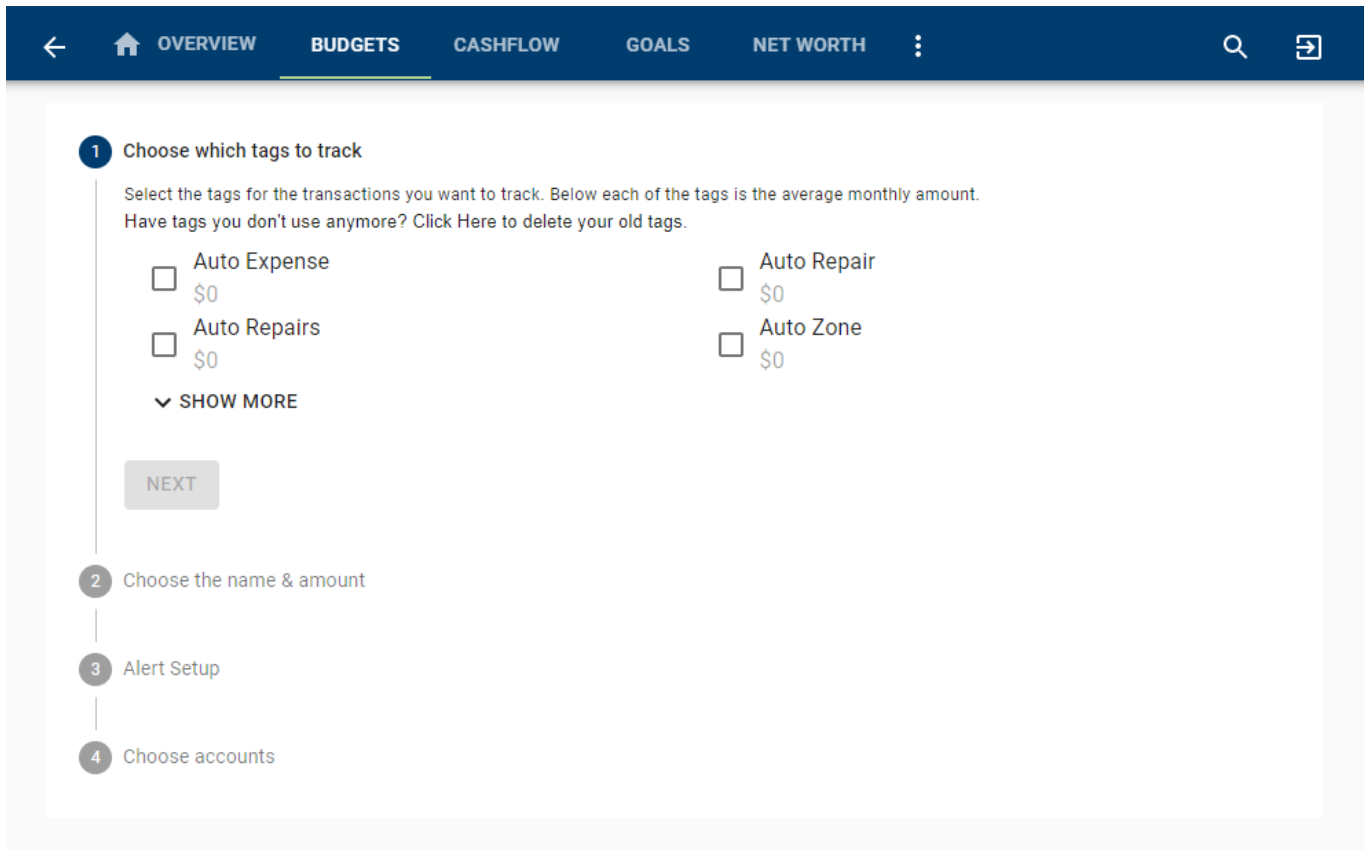
- Car/Travel: UPDATE x  
You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.
- Personal: + CREATE x  
You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

Home ownership can be more than just a dream. Mortgages

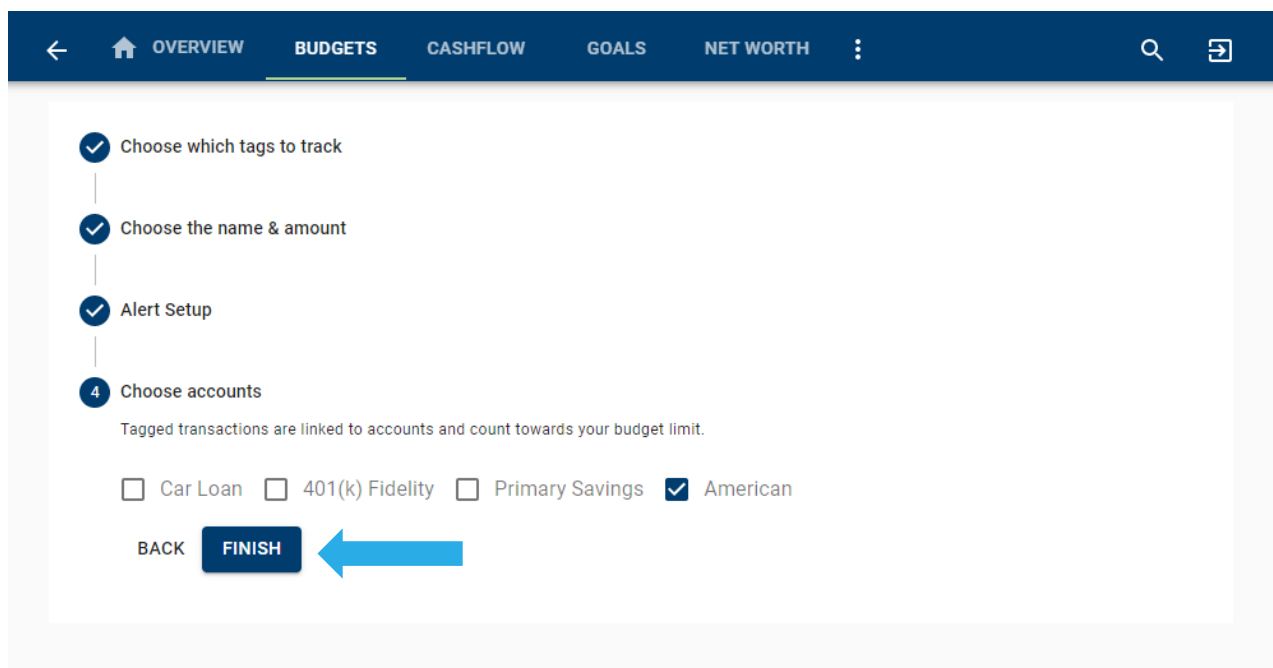
**ADD BUDGET** | **BUDGET ALERT**

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, a dark blue navigation bar contains the following menu items: OVERVIEW, BUDGETS (highlighted), CASHFLOW, GOALS, and NET WORTH. On the right side of the navigation bar are search and share icons. Below the navigation bar, the main content area is divided into two sections. The left section is titled 'November 2021' and features a status message: 'You are currently UNDER BUDGET'. Below this, there is a summary for 'All Budgets' showing '\$3,044 of \$3,085 Left'. A progress bar for 'Today' is shown. Below the summary, a list of individual budgets is displayed, each with a progress bar and a right-pointing arrow: 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), and Entertainment Budget (\$73 of \$100 Left). The right section is titled 'History' and contains a bar chart showing spending from May to October. The chart shows zero spending from May to August, a spike in September, and a larger spike in October. A red dashed line indicates 'No historical data available' for the first four months. Below the chart, a summary states: 'Your total monthly Spending Budget is: ON TRACK'. A blue arrow points to the 'ON TRACK' text. Below this, it says: 'You've been under by \$5,768 on all budgets over the last 8 months.' There are two budget categories listed: 'Car/Travel' with an 'UPDATE' button and 'Personal' with a 'CREATE' button. Below these, it says: 'You've spent an average of \$0 on Personal. Creating a budget will help you track this spending.' At the bottom right, there are two dark blue buttons: 'ADD BUDGET' and 'BUDGET ALERT'. At the bottom left, there is a promotional banner for 'Home ownership can be more than just a dream' with a 'Mortgages' button.