

Money Management™

Spending

Spending Summary

How much do you spend on groceries each month, or eating out? What about shopping, or entertainment? The spending pie makes it easy for you to quickly identify your biggest expenses, as well as dive into the smallest details.

Browsing your spending can be a helpful way to stay on top of recent expenses. Note the color coding – the same colors carry over to other areas. Select a piece of the pie to see the exact amount for that expense – that expense is highlighted at the right, too. Select again to see the sub-categories listed on the right. At any time, select in the middle of the pie to see that list of transactions.

You want to ensure that all of the transactions have been categorized correctly. If you spot a transaction that needs to be re-categorized, such as a shopping transaction that was really a gift, you can categorize the transaction by simply selecting the transaction, then the category and selecting the appropriate option from the dropdown list. The system automatically categorizes most transactions, and learns from you as you re-categorize anything.

Back on the pie chart, you can use the date range selector tool at the top to adjust the dates. If you're missing some categories, check the Other category – not seen in this demo -, which is a "catch all". Any category that represents less than 3 percent of total spending is displayed in Other.

Note that you can see your income from this view as well. <click back on spending>

With such a clear breakdown of your spending, you'll find it easy to spot any holes in your wallet, areas in your financial life where you're giving away dollars that you're not getting any value back for. This tool helps you cut out or cut back on what you can, and put that money to good use elsewhere.

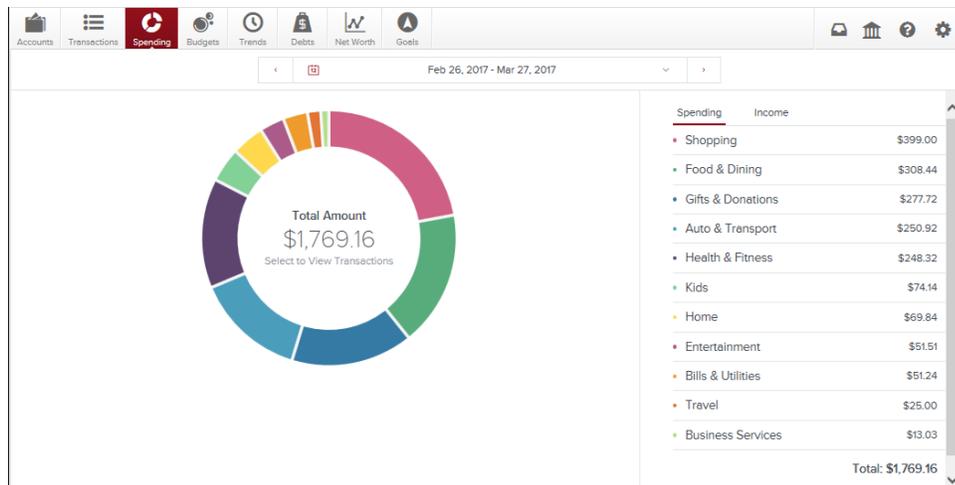
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Spending FAQs

Overview

- Select the date from the top navigation bar.
- You can toggle between Spending and Income.
- Each color in the spending wheel corresponds with the categories listed in the table.
- Click a segment of the spending wheel to see subcategories. Click the center of the wheel to see specific transactions.



Not seeing all your categories?

- Check the Other category, which is a "catch all" in the spending view. Any category that represents less than 3 percent of total spending is represented in the Other category.
- Also, be sure your transactions are properly categorized. Our system effectively categorizes most transactions, but some slip through. If you categorize transactions, the system will learn your preferences.

Does a spending category seem off?

- Be sure your transactions are properly categorized. Our system effectively categorizes most transactions, but some slip through. If you categorize transactions, the system will learn your preferences.
- Note that certain credit transactions such as reimbursements are counted in the spending wheel.