

6. Click the **Transactions** tab. The Transactions tab provides a breakdown of any transactions that were pulled in through your connections. You can sort by **Date Range**, **All Accounts**, and **All Categories**.

1. To manually classify a transaction, highlight it by clicking on the particular line item.

The screenshot shows the 'John and Sue Smith' budgeting tool interface. The 'Transactions' tab is selected and circled in red. The interface displays filters for 'Date Range' (Last 30 Days), 'Accounts' (All Accounts), and 'Categories' (All Categories). A search bar and 'Reset All' button are also visible. Below the filters, a summary shows 'Transactions Found: 30' and 'Total Amount: \$8,590.70'. An 'Export Results' button is located on the left. The main table lists transactions with columns for Date, Description, Account, Category, and Value. The transaction for 'Jan 27, 2013' with description 'IRS' is highlighted with a red border.

Date	Description	Account	Category	Value
Jan 29, 2013	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Jan 28, 2013	STRIDE RITE	Platinum Credit Card	Kids Clothing	-\$44.19
Jan 27, 2013	IRS	Easy 123 Checking	Unclassified	-\$356.00
Jan 25, 2013	STAPLES VALLEY FORGE	Platinum Credit Card	Home Supplies	-\$56.55
Jan 25, 2013	STAPLES VALLEY FORGE	Easy 123 Checking	Home Supplies	-\$3.22
Jan 23, 2013	PAYMENT	Easy 123 Checking	Bank Fee	-\$1.00
Jan 22, 2013	WAWA TOWN	Platinum Credit Card	Gas & Fuel	-\$3.99
Jan 21, 2013	OVERDRAFT PROTECTION	Easy 123 Checking	Bank Fee	-\$75.00
Jan 19, 2013	COLLEGEVILLE WEGMANS	Platinum Credit Card	Groceries	-\$111.42
Jan 19, 2013	INTEREST PAYMENT	Easy 123 Checking	Interest Income	\$0.22

2. Click the Category Drop down and choose from the pre-existing category list.

The screenshot shows the 'John and Sue Smith' client interface. The 'Spending' tab is active, and the 'Transactions' sub-tab is selected. The interface displays a list of transactions for the last 30 days. A transaction for 'IRS' on Jan 27, 2013, is highlighted, and its category dropdown menu is open, showing options like 'Unclassified', 'Electronics & Software', 'Merchandise/Misc', 'Sports & Hobbies', 'Taxes', 'Federal Tax', 'Local Tax', and 'Medicare Tax'. The 'Federal Tax' option is circled in red.

Date	Description	Account	Category	Value
Jan 29, 2013	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Jan 28, 2013	STRIDE RITE	Platinum Credit Card	Kids Clothing	-\$44.19
Jan 27, 2013	IRS	Easy 123 Checking	Unclassified	-\$356.00
Jan 25, 2013	STAPLES VALLEY FORGE	Platinum Credit Card		-\$56.55
Jan 25, 2013	STAPLES VALLEY FORGE	Easy 123 Checking		-\$3.22
Jan 23, 2013	PAYMENT	Easy 123 Checking	Federal Tax	-\$1.00
Jan 22, 2013	WAWA TOWN	Platinum Credit Card		-\$3.99
Jan 21, 2013	OVERDRAFT PROTECTION	Easy 123 Checking	Bank Fee	-\$75.00
Jan 19, 2013	COLLEGEVILLE WEGMANS	Platinum Credit Card	Groceries	-\$111.42

3. To recognize this transaction in the future, check the Create a Rule box.

The screenshot shows the 'Transactions' view for John and Sue Smith. The interface includes a navigation bar with tabs for Home, Organizer, Workshop, Spending, Investments, Vault, and Reports. Below this are filters for Date Range (Last 30 Days), Accounts (All Accounts), and Categories (All Categories). A search bar and 'Reset All' button are also present. The main area displays a table of transactions with columns for Date, Description, Account, Category, and Value. The transaction for 'PAYMENT' on Jan 23, 2013, is highlighted in yellow, and a 'Create a Rule' button is circled in red below it.

Date	Description	Account	Category	Value
Jan 29, 2013	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Jan 28, 2013	STRIDE RITE	Platinum Credit Card	Kids Clothing	-\$44.19
Jan 27, 2013	IRS	Easy 123 Checking	Unclassified	-\$356.00
Jan 25, 2013	STAPLES VALLEY FORGE	Platinum Credit Card	Home Supplies	-\$56.55
Jan 25, 2013	STAPLES VALLEY FORGE	Easy 123 Checking	Home Supplies	-\$3.22
Jan 23, 2013	PAYMENT	Easy 123 Checking	Bank Fee	-\$1.00
Jan 22, 2013	WAWA TOWN	Platinum Credit Card	Gas & Fuel	-\$3.99

4. Set up the **Rule** and click **Done**

The screenshot shows the 'Transactions' tab in the budgeting tool. At the top, there are navigation tabs: Home, Organizer, Workshop, Spending, Investments, Vault, Reports, and Settings. Below these are filters for Date Range (Last 30 Days), Accounts (All Accounts), and Categories (All Categories). A search bar and a 'Reset All' button are also present. The main area displays a table of transactions with columns for Date, Description, Account, Category, and Value. A transaction for 'IRS' is highlighted in yellow. Below the table, a 'Details' section shows the transaction description. A 'Rule' section is also highlighted in yellow, containing a checked checkbox and the text: 'Always rename transactions containing IRS in the description to IRS and categorize as Federal Tax.' A 'Manage Rules' link is visible. The 'Export Results' button is circled in red, and the 'Done' button is also circled in red.

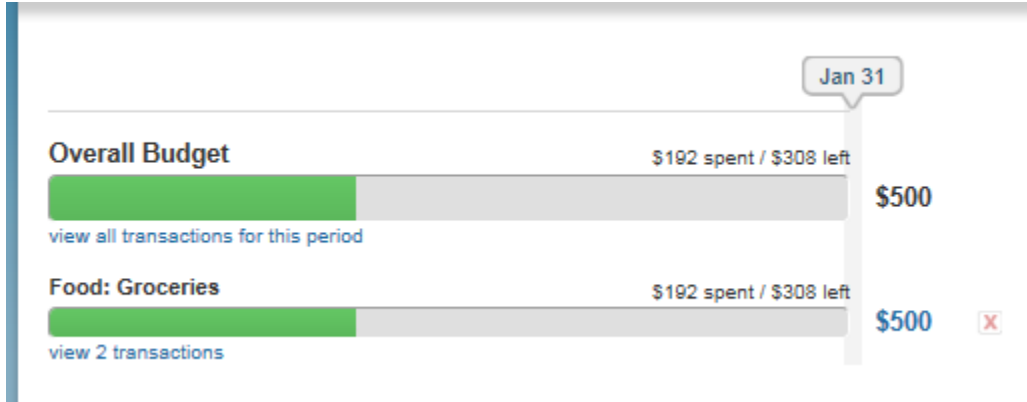
Date	Description	Account	Category	Value
Jan 29, 2013	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Jan 28, 2013	STRIDE RITE	Platinum Credit Card	Kids Clothing	-\$44.19
Jan 27, 2013	IRS	Easy 123 Checking	Federal Tax	-\$356.00

Note: To export your transactions, click on the **Export Results** tab

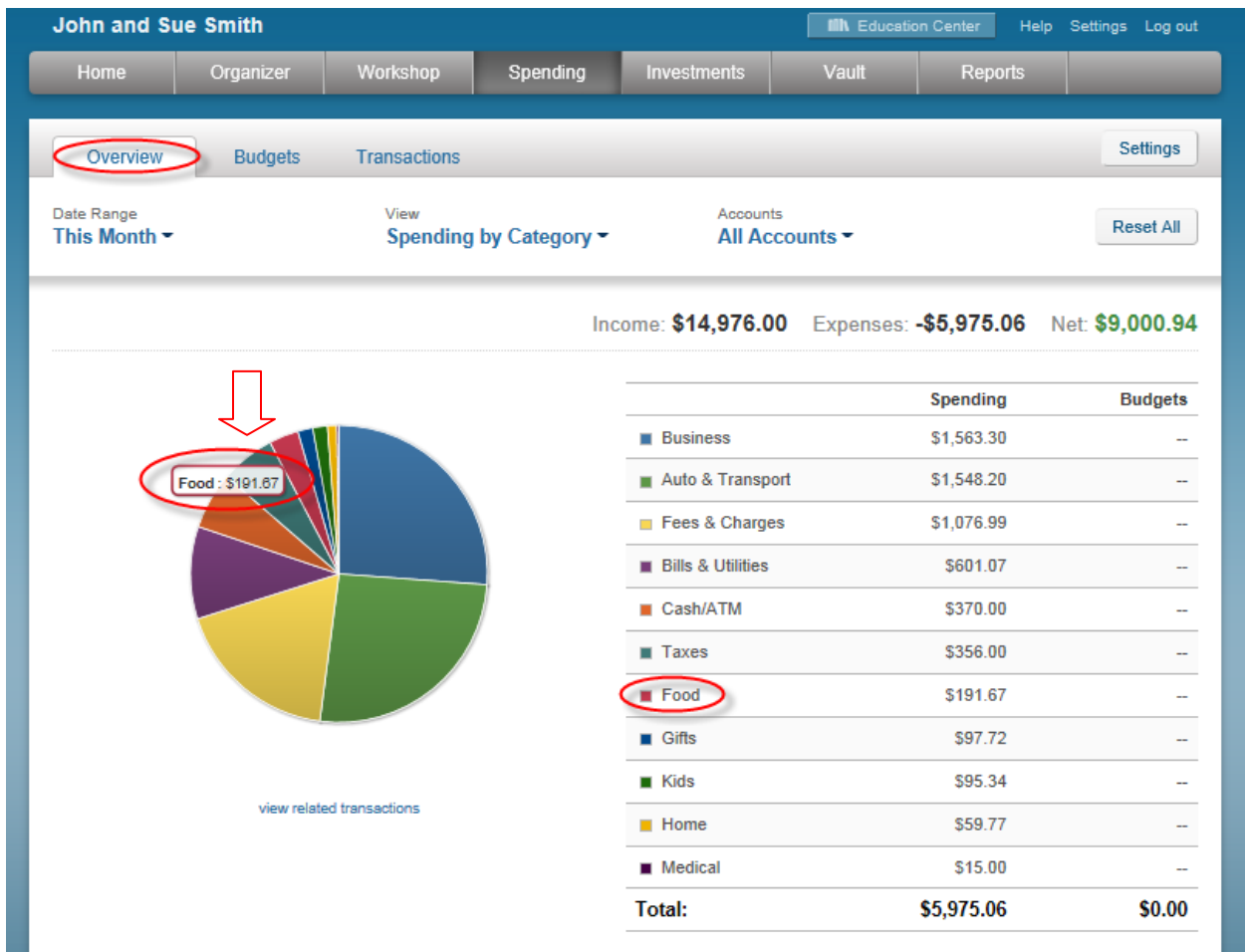
5. After classifying all transactions, you can view your **Budget** to track the expense.

Overview					Budgets					Transactions					Settings				
Date Range		Accounts		Categories		Search for transactions					Reset All								
Last 30 Days		All Accounts		All Categories															
Export Results					Transactions Found: 30					Total Amount: \$8,590.70									
Date	Description	Account	Category	Value															
Jan 29, 2013	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00															
Jan 28, 2013	STRIDE RITE	Platinum Credit Card	Kids Clothing	-\$44.19															
Jan 27, 2013	IRS	Easy 123 Checking	Federal Tax	-\$356.00															
Jan 25, 2013	STAPLES VALLEY FORGE	Platinum Credit Card	Home Supplies	-\$56.55															
Jan 25, 2013	STAPLES VALLEY FORGE	Easy 123 Checking	Home Supplies	-\$3.22															
Jan 23, 2013	PAYMENT	Easy 123 Checking	Bank Fee	-\$1.00															
Jan 22, 2013	WAWA TOWN	Platinum Credit Card	Gas & Fuel	-\$3.99															
Jan 21, 2013	OVERDRAFT PROTECTION	Easy 123 Checking	Bank Fee	-\$75.00															
Jan 19, 2013	COLLEGEVILLE WEGMANS	Platinum Credit Card	Groceries	-\$111.42															
Jan 19, 2013	INTEREST PAYMENT	Easy 123 Checking	Interest Income	\$0.22															
Jan 17, 2013	PORSCHE FINANCIAL SERVICES	Easy 123 Checking	Auto Payment	-\$638.11															
Jan 16, 2013	WWW.AMAZON.COM	Platinum Credit Card	Gifts	-\$20.37															
Jan 15, 2013	WHOLE FOODS MARKET	Easy 123 Checking	Groceries	-\$80.25															

6. The **Budget** Tab now displays the current amount spent on groceries & the amount left in the monthly grocery budget.



7. The **Spending Overview** tab now incorporates your budget.



8. The Home page will populate the **Spending & Budgeting** panes with the new data entered.



ADDITIONAL READING: Client Connection Booklet