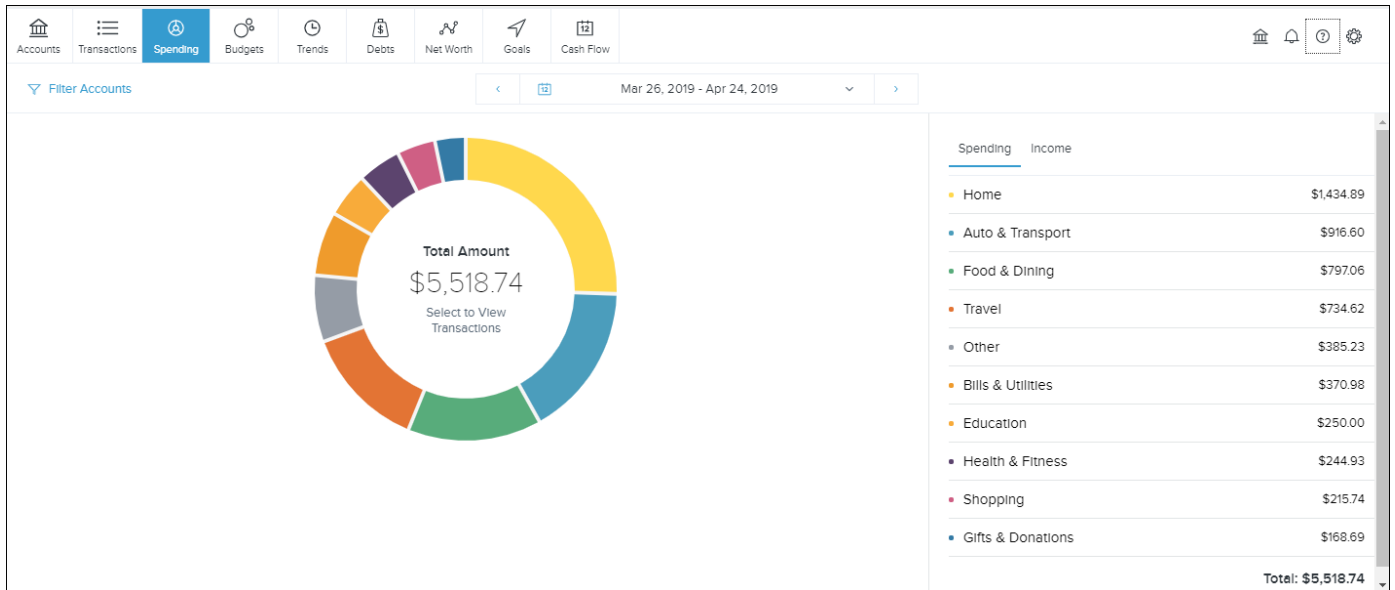


Spending FAQs

Note: These FAQs are taken directly from the in-product help. If you're assisting users and you're in your own account so you can talk them through their issue more effectively, you can find all of this information there.

Overview

- Select the date from the top navigation bar
- Filter Accounts to display or remove desired accounts
- 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 in the Other category.
- Be sure your transactions are properly categorized. The 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. The 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.