

Introducing TRACK MY CA\$H! A brand-new personal budgeting tool to help you budget, plan and succeed!

You can access TRACK MY CA\$H from Online or Mobile Banking. Just select “Insights” from the main menu.



Dashboard



Messages



Accounts



Transfers



MBR to MBR Transfer



Remote deposits



Bill pay



Insights



Application center



Support

Expand the Insights menu using the drop down option



Dashboard



Messages



Accounts



Transfers



MBR to MBR Transfer



Remote deposits



Bill pay



Insights



Overview

Budgets

Cashflow

Goals

Net worth

Spending by category

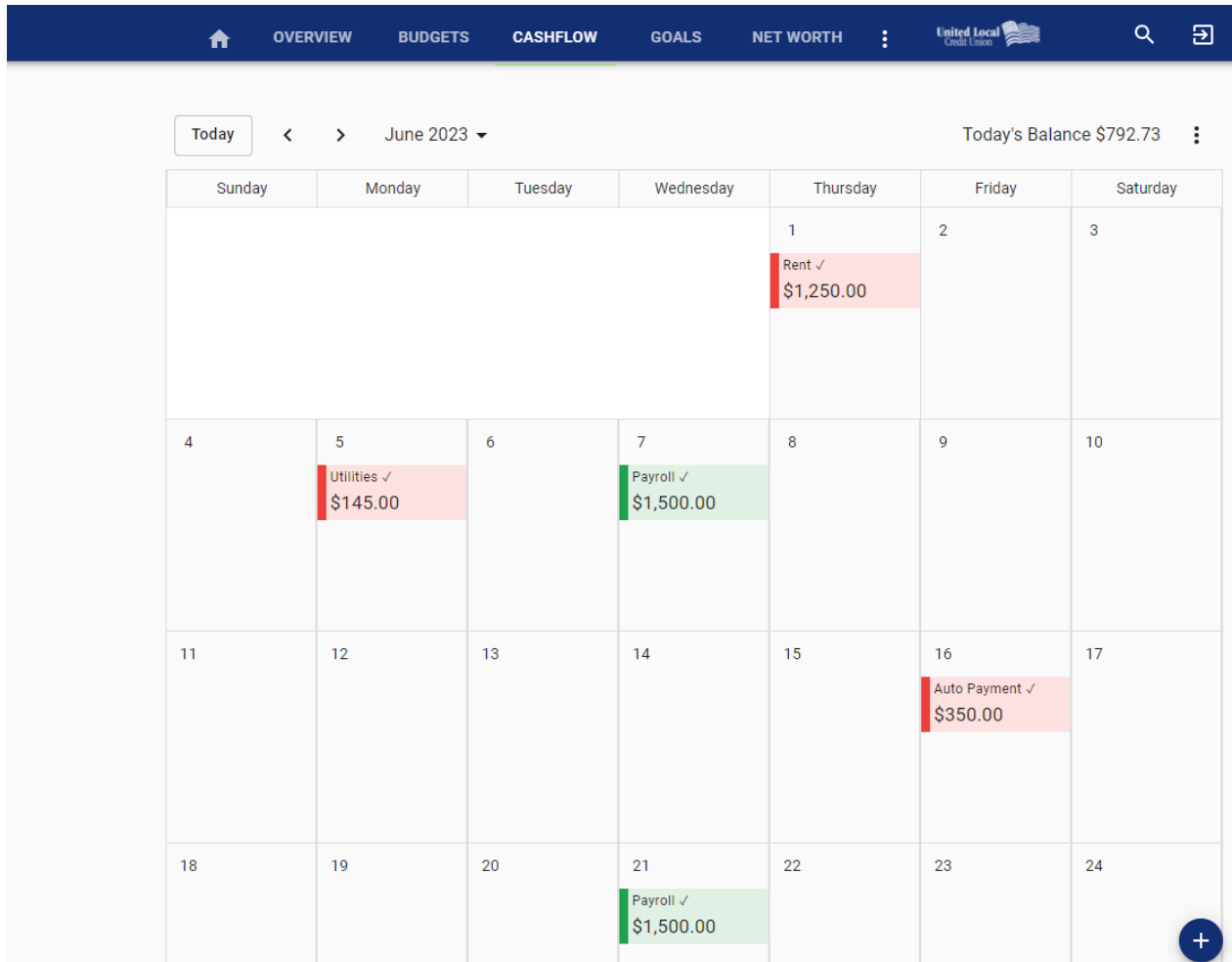


Application center

Overview gives you a glimpse of everything! Your budgets, goals, cashflow and net worth.

Budgets enable you to create or edit personalized budgets.

Cashflow is an interactive calendar that tracks your income and expenses, so you always know what you need and when!



Goals lets you create and edit personalized goals such as paying off credit cards or loans or hitting a savings goal, so you'll know exactly what to pay or save and when!

GOALS

CURRENT COMPLETED

VISA CR CARD \$998.61
Card

Pay off a credit card
Paid \$0.00 towards goal of \$998.61
Pay \$200.00 monthly to complete on 11/30/2023

OVERDRAFT LOC \$738.82

Pay off loans
Paid \$0.00 towards goal of \$738.82
Pay \$110.00 monthly to complete on 12/31/2023

Types of Goals

There are two types of goals to choose from: Save for Goals and Pay Off Goals.

Save for Goals could include saving for a house, car, or college fund.

Pay Off Goals could include paying off your credit card debt, short and long term financial goals.

Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals

ADD GOAL

ADD GOAL ALERT

Net worth lets you see your total assets and your total liabilities. You can even include assets and liabilities from other credit unions, banks, or investments!

NET WORTH

< 2023 >

--- No historical data available

\$0
-\$5k
-\$10k
-\$15k
-\$20k

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Assets \$792.73 >

Liabilities \$23,048.85 >

ADD ASSET

ADD LIABILITY

TOTAL (JUN 1) -\$22,256.12 **CHANGE (SINCE MAY 1)** \$0.00

The support menu can be accessed by selecting the 3 dots on the far-right side of the top menu.

Transaction Search allows you to search all your transaction and tag items you want to include in budgets or goals.

The screenshot displays a financial dashboard with a dark blue top navigation bar. The navigation bar includes a home icon, menu items for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH, and a search icon. A dropdown menu is open from the top right, listing options: Transaction Search, Accounts, Link Account, Alerts, and Help. Below the navigation bar, there is a search bar with the text "Search" and a "SELECT TAGS" button. To the right of the search bar, there is a date selector for "2023 Jun 30, 2023" and a "SEARCH" button. Below the search bar, there is a checkbox labeled "Show Untagged Transactions". The main content area shows a list of transactions for "Wednesday, June 28, 2023". The transactions are listed in a table with columns for the transaction name, account type, tag, and amount. The transactions are: Google Payments (Checking, Payment, -\$4.99), PayPal (Checking, Personal, -\$24.95), Amazon.com (Checking, Personal, -\$16.19), Payment (VISA CR CARD, Entertainment, -\$29.99), Transfer (2018 NISSAN ROGUE SPORT, Savings, \$360.39), DEPOSIT ACH UNITED LOCAL CRE (CHECKING, Income, \$330.00), and Transfer (CHECKING, Savings, -\$360.39). Below the transaction list, there is a date selector for "Tuesday, June 27, 2023".

Transaction Name	Account Type	Tag	Amount
Google Payments	Checking	Payment	-\$4.99
PayPal	Checking	Personal	-\$24.95
Amazon.com	Checking	Personal	-\$16.19
Payment	VISA CR CARD	Entertainment	-\$29.99
Transfer	2018 NISSAN ROGUE SPORT	Savings	\$360.39
DEPOSIT ACH UNITED LOCAL CRE	CHECKING	Income	\$330.00
Transfer	CHECKING	Savings	-\$360.39

Accounts gives you a list of all accounts used in TRACK MY CA\$H. You can also use this page to hide inactive accounts or accounts you do not want included in your budgets or net worth.

ACTIVE		INACTIVE
Cash		\$748.57
Secondary CHECKING	Checking	\$0.00 >
Primary 1 CHECKING	Checking	\$0.00 >
House Pymnt & Solar	Noble Credit Union	\$738.57 >
Home Improvement Funds	Noble Credit Union	\$5.00 >
Equity Loan	Noble Credit Union	\$5.00 >
Credit Cards		\$998.61
VISA CR CARD	Card	\$998.61 >
Debts		\$22,050.24

Link Account allows you to add an account at another credit union, bank, lender, or investment firm. Funds in these accounts can then be used in your budgets, goals, and net worth.

Transaction Search
Accounts
Link Account
Alerts
Help

Find your bank

Bank connections

[Review](#)

Search for your bank

Alerts enables you to set up alerts of your choosing for transactions, budgets, and goals.

Transaction Search

- Accounts
- Link Account
- Alerts
- Help

Goal Progress

- Notify me when my **Pay off a credit card** goal is **25%** of the way there.
- Notify me when my **Pay off a credit card** goal is **50%** of the way there.
- Notify me when my **Pay off a credit card** goal is **80%** of the way there.
- Notify me when my **Pay off loans** goal is **50%** of the way there.
- Notify me when my **Pay off loans** goal is **25%** of the way there.
- Notify me when my **Pay off loans** goal is **80%** of the way there.

Spending Target Exceeded

- Notify me when my **Diningout Budget** exceeds **80%**.
- Notify me when my **Home, Savings & Transportation Budget** exceeds **80%**.

Help contains FAQs to answer a wide range of questions about TRACK MY CA\$H. You can also send in a support request.

Transaction Search

- Accounts
- Link Account
- Alerts
- Help

Q. How does changing the method for accessing and adding third party accounts affect accounts already added?

Q. Why are the third party accounts I previously added no longer updating, or showing?

Q. Why are third party accounts I previously added now being shown as Inactive accounts?

Q. Why are my Goals no longer updating?

Q. Why do I no longer see a Goal I previously added?

Q. When looking through my transactions, why do I see entries that appear to be duplicates?

Q. Why do I no longer see transactions from one of my third party accounts in one of my budgets?

Q. What does it mean if an account I linked using the previous method of adding accounts is closed?

Q. Should I archive accounts that were linked using the previous method of adding accounts?

Q. Can I link investment accounts using the new method of adding third party accounts?

Q. Why do I need to accept Terms & Conditions when linking to an external account?

Q. When I accept the Terms & Conditions to link an external account, who is my information being shared with?

Submit a Support Request

Email *

Area of help needed *

I want to request a feature

Please describe the issue *

SEND