

Customize and view a spending analyzer at any time.

Step 1:

On the **Spending Analysis** tile, click the blue **Activate** button.

Accept the terms and conditions.

You will be alerted that your activation is in progress.



Spending Analysis:

Here you will see your spending broken down into categories along with a pie chart.

You can filter the analysis by **Accounts**, **Categories**, and **Time frames**.

'ou've spent 98% more than the pre	vious time s	pan			
All 1 Account Selected	~	All 7 Category Groups Selected	~	Last 30 Days	~
		Category Groups		Amount	% of Total
		Food Expenses		\$543.96	29%
\$1,848.07 Total Spend		Personal & Family		\$543.38	29%
		Miscellaneous Expenses		\$456.70	25%
		Automotive Expenses		\$229.33	12%
		• Travel		\$48.50	3%
		Healthcare		\$16.28	1%
		Home Expenses		\$9.97	1%

Categorize Spending:

You can re-categorize spending by clicking on a purchase in your transaction history.

Simple select a new category from the drop down menu and click **Save**.

Apollo Cafe		-\$2.43
Restaurants/Dining		\$1,640.98
Post Date		
July 13, 2023		
Name		
Apollo Cafe		
Original Name		
POS WD APOLLO CAFE CHELMSFORD MAUS		
Category		
Restaurants/Dining	~	

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