**Budgets FAQs**

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

Overview

- Auto-generated budgets use averages from last 90 days of transactions – recommendation is to use the auto-generate option the first time you access Budgets

- **Green = less than 80% of a budget is used.**

- **Yellow = more than 80% of a budget is used.**

- **Red = more than 100% of a budget is used.**

- Bands around the edge of each bubble represent status of sub-budgets

- Top middle: Select a different month

- Upper right: "Add New Budget" to add a budget for categories not yet selected. Cannot create new categories (i.e. Budgets) – but can create sub-budgets under each

  o Ability to recalculate budgets is under "Add New Budget"

- Projected Income is calculated for you, but can edit by selecting pencil icon

- Note: Depending on your product, the list view might be collapsed at the bottom. There will be an icon to expand it

- Select a budget (bubble or from list) to manage it
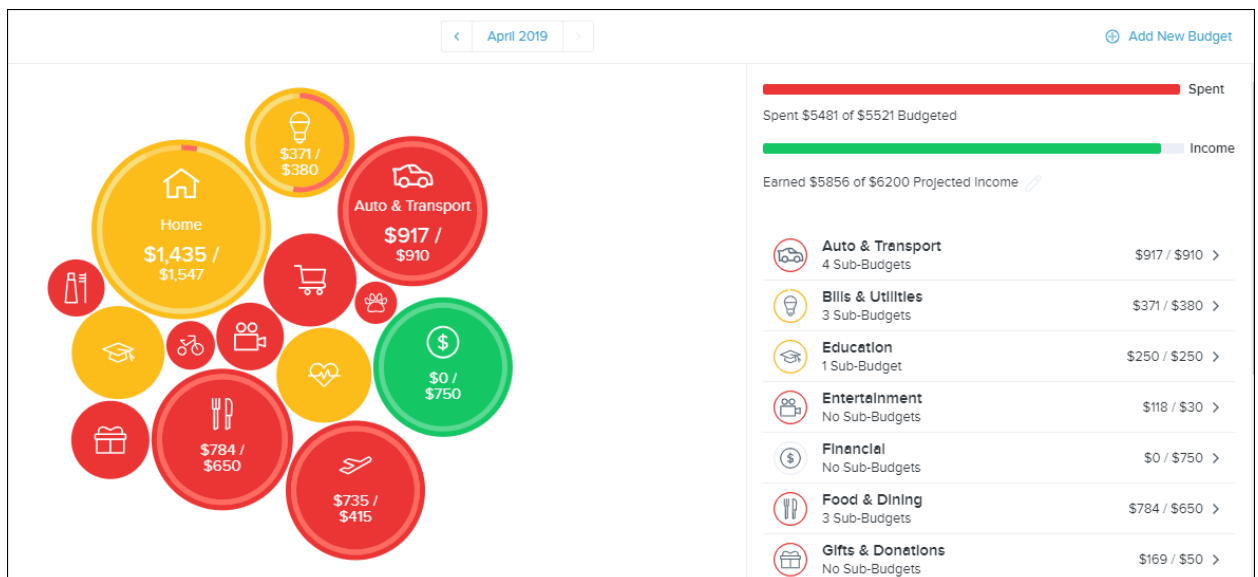
Manage a Budget

- Select the budget item to view this screen
- "Transactions" – view transactions in this budget for this month
- "Edit Budget" – see next page
- "Add New Sub-Budget" - select from list of existing sub-categories or create your own
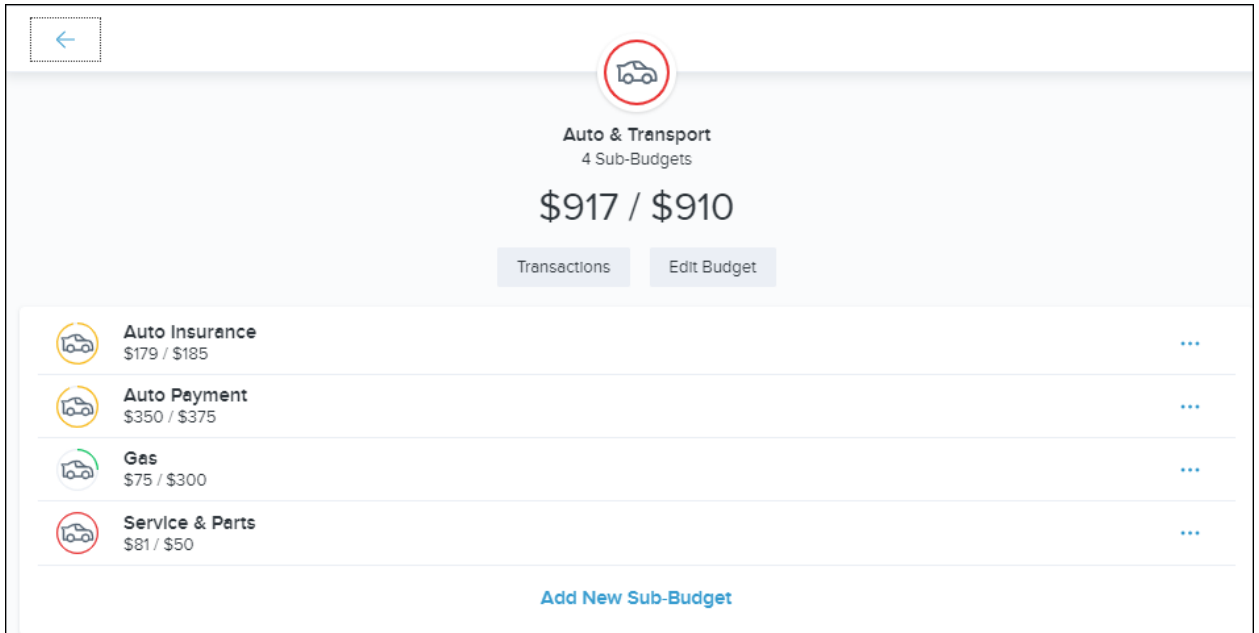
- Dot menu next to each sub-budget – view transactions, edit its amount, or delete it.
- Note that the parent budget's amount won't decrease if you delete a sub-budget
- If you add a sub-budget or increase its amount, the parent amount will increase
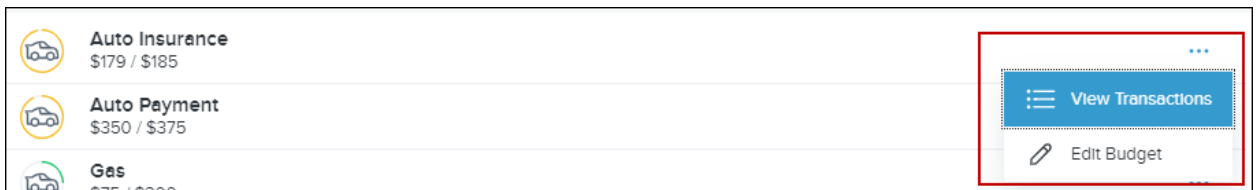
Edit a Budget

- Edit the amount (note line at top that tells you amount of unbudgeted projected income remaining for you to use)

- Delete this budget

Edit Auto & Transport Budget?

Unbudgeted Projected Income: $679

Auto & Transport Budget Amount

$ 910

4 Sub-budgets: $910

Cancel   Save

🗑 Delete Auto & Transport Budget