

My Budget Tracker – Frequently Asked Questions

Q. Why do I have a red error on one of my external accounts?

A red symbol is an indication of a login error. This can mean that your password needs to be updated, or you have a security questions that need to be answered. Click the link provided in the error message to manually update your username and password. You may also be prompted with additional security questions. If your account still does not update, please contact us.

Q. How do I add an account?

1. Click the : or + button.
2. Select 'LINK ACCOUNT' or 'ADD LINKED ACCOUNT.'
3. Enter your financial institution's name into the search box and click 'SEARCH'
4. Enter your login information EXACTLY as you would when logging into your financial institution directly and click 'CONNECT'
5. Wait several moments for your accounts(s) to upload. More than one account may result in a longer load time.
6. If an account is listed, that has already uploaded automatically, or you see an account you don't which to link, you can **uncheck** those accounts. Then you click **SAVE**.

If you receive an error message:

- First check that your login credentials are correct and are still working by logging directly on the institution's website.
- If you are still unable to add your account, please contact us. Be sure to provide the following information:
 - The name of the financial institution you are trying to add
 - The website (URL) used to access the account directly
 - Please leave the partially added attempt in your account, as this is necessary for troubleshooting.

Q. How do I add or change a tag?

1. Click on the transaction requiring a new or updated tag.
2. Highlight and delete the existing tag.
3. Type a new tag and press 'Enter' or select an existing tag.
4. Optional create a rule: Check the box to apply this tag and title to all similar transactions.
5. Click 'SAVE'
6. Refresh the page to apply the new rule, if applicable.

Q. How do I handle cash transactions like ATM withdrawals?

Use 'split tags' to categorize your cash withdrawal transactions. You are unable to manually enter cash transactions, but using 'split tags' will allow you to break down a cash transaction into groceries, dining out, transportation, etc.

Q. Can I pay bills with the Cashflow Calendar?

The Cashflow calendar is designed for planning and estimation purposes only. No real money is ever withdrawn from your account(s) in My Budget Tracker. The Cashflow calendar simply uses your current daily balance and then takes into account all future income and bills that you've entered. The Cashflow calendar will project your cash flow going forward.

Q. Your site is not working in my browser!

There are a lot of browser out there, and we do our best to support as many browsers as we can.

We currently support.

- Mozilla Firefox (Windows & Mac)
- Safari (Windows & Mac)
- Google Chrome (Windows & Mac)
- Internet Explorer 11
- Microsoft Edge

If you have an older browser, please try upgrading to one of these supported browsers. Also, ensure that your security settings all My Budget Tracker to function properly. You may experience issues if your browser has cookies turned off, is operating with a high security level, or has additional add-ons installed. If you experience a problem with one of our supported browsers, please contact support after verifying your browser settings.

Q. I have more My Budget Tracker questions. How do I contact you?

Submit a Support Request