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FIRST STATE BANK

Member FDIC

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Frequently Asked Questions

Q.How do I add an account?

1. Click the “Add Accounts” button in your left sidebar.
2. Locate the external financial institution for which the account to be added belongs by one of two available methods

- To use the search by name feature, type the external financial institution name in the box.
- From the list, click the name of the external financial institution.

3. Once the external financial institution is selected, click “NEXT”.
4. Enter the User ID and Password associated with the previously selected financial institution.
5. To add accounts from multiple external financial institutions, click “SELECT ANOTHER BANK” and repeat steps 2 through 4.
6. After you add all external credentials, click “NEXT”.
7. To add additional accounts, click “ADD MORE ACCOUNTS” and repeats steps 2 through 6.
8. After you add all financial institutions and accounts, click “CLOSE”.

Q.How do I delete an account?

1. Click the “SETTINGS” Tab.
2. In the “ACCOUNTS” widget, located the account to delete under the appropriate financial institution name.
3. Click the “DELETE ICON” next to the account.
4. Do one of the following:

- To confirm the deletion of the selected account, click "DELETE ACCOUNT".
- To return to the Accounts Management Widget without processing the request, click "CANCEL".

Q.How do I search for a transaction?

1. Click the "TRANSACTIONS" tab.
2. In the "TRANSACTION" widget, in the "SEARCH" box, type keywords.
3. Click the "MAGNIFYING GLASS ICON".

Q.How do I change the description or category of a transaction?

1. Select a transaction from the transactions list.
   - Transaction detail overlay page appears with additional transaction details.
2. When applicable, in the "DESCRIPTION" box, edit the text.
   - NOTE: the description field is a required field, as noted by the asterisk. *
3. From the "CATEGORY" list, select an alternate category.
   - NOTE: Changing the category or subcategory provides the additional option of creating a rule to categorize all similar future transactions in the same way.
4. Do ONE of the following:
   - To retain all applicable edits, click "SAVE".
   - To return to the transactions menu without saving any changes, click "CANCEL".

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Q.How do I view transactions for a specific date ranch?

1. In the Date Filter, Select the "DATE RANGE" option.
2. Select from a specific range or by the last 7, 30, or 90 days.

3. To generate the data for the specified filter option, click "FILTER BY DATE".

Q.How do I add a new budget?

1. In the Budgets widget, Click "ADD NEW BUDGET".
2. Enter the details for the new budget.
3. Complete ONE of the following:

-To create the new budget, click "SAVE".
-To exit without saving changes, click "CANCEL".

Q.How do I add a new goal?

1. In the Goals widget, click "ADD NEW GOAL".
2. Enter the details for the new goal.
3. Complete one of the following
   - To create the new goal, click "SAVE".
   - To exit without saving changes, click "CANCEL".

Q. How do I resolve an alert notification?

1. Click "RESOLVE" to the right of the associated alert.
2. Enter applicable information in the window that appears.
3. Click "SAVE".

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Q.How do I add a new goal?

4. In the Goals widget, click "ADD NEW GOAL".
5. Enter the details for the new goal.
6. Complete one of the following
   - To create the new goal, click "SAVE".
   - To exit without saving changes, click "CANCEL".

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