Money Manager User Manual: Accounts

coastcapital®

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Accounts Help

Monitor your financial activity across all of your accounts in one convenient place.

How it works:

- Scroll to the bottom of the My Accounts page to view all of your accounts together.
- All of your accounts will be listed together alphabetically below your Coast Capital accounts.

Add an Account

Add your accounts from other financial institutions so you can view them all in the same place.

1. Tap **Add an Account** to open the **Add Accounts** window.
    a. On mobile, tap **View All Accounts** from the main dashboard and then tap the **+** icon at the top right to see a list of financial institutions to choose from.
2. Search for a financial institution by name or enter their website URL.
    a. On mobile, if you still cannot find the account then tap **Search Accounts** and enter the name of the institution you're looking for. If you still cannot find it, then search by entering the web address for the institution.
3. Select your institution from the list and enter the necessary login credentials.

Manual Accounts

There may be some financial details or financial institutions that cannot link with Money Manager. In this case, you will need to add the accounts manually.

Note that if you have a mortgage or loan that was used to acquire an asset like a property or a car, you should add a manual account for that asset. That will allow Money Manager to track the positive value of the asset in addition to the mortgage/loan debt.

To add a manual account:

1. In the Accounts tab, tap **Add an Account**
2. Tap **Add a Manual Account**
3. Choose the account type. You may choose from the following:
    a. Chequing
    b. Savings
    c. Loan
    d. Credit Card
    e. Investment
    f. Line of Credit
    g. Mortgage

h. Property
i. Cash
j. Insurance
k. Prepaid
l. Other

4. Enter the details of the account, including the name you'd like to give the account. The details will differ for each account type. For example, a mortgage account would require a balance, interest rate, and payment amount while insurance would not require interest rates or balances.
5. Tap **Save.**

To delete a manual account:

1. Tap the account you would wish to delete.
2. Tap the ••• icon and then choose **Delete Account**.
3. Type "**DELETE".**
4. Tap **Delete** to confirm that you want to delete the account, or tap **Cancel** if you change your mind.

Account Details

Easily view your recent transactions, balances, and specific account details with a few taps.

1. On the Accounts tab, tap the account you would wish to view.
2. Tap Activity, History, or Details.

- This window will show your latest activity in the form of recent transactions.
- The History tab will show the monthly debits and credits to that account over the last 12 months.
- The Details tab will display information such as the account name, account type, interest rate, and more.

Edit Account

To edit information on any account, from the **Accounts** tab:

1. Select any account listed to open the **Account Details** window. Tap **Details** to edit the account.

Here, you can edit information such as:

- Account Name
- Account Type
- Interest Rate (%)
- Credit Limit and Original Balance (applicable to debt accounts only)
- Account Balance (applicable to manual accounts only)
- Business Account Toggle

Hide Account

If you have accounts that you do not want to be used in Money Manager's features or reports, you can choose to hide the account. This will stop information or transactions from the account to factor into other tabs of Money Manager. By hiding an account the data related to it won't be deleted, and you can easily unhide an account.

To hide an account:

1. Bring up the **Account Details** window for the account you wish to hide.
2. Tap the ••• icon on the top right and choose **Hide Account** from the dropdown menu. A warning message will appear asking you to confirm that you like to hide the account.
3. Tap **Hide** to confirm, or **Cancel** if you change your mind.

Hidden accounts will still be visible on the **Accounts** tab. You can find them on the bottom of the list of accounts with their icons greyed out and marked as "Hidden".

Unhide an account

To unhide an account:

1. Tap the hidden account to bring up its **Account Details** window.
2. Tap the **Unhide** button. Your account data will appear instantly and will now be included in the other Money Manager features.

Merge duplicate accounts

Duplicate accounts may appear when existing account connections are altered. Examples of this are when a financial institution changes the way they name their accounts in their system, or when a lost/stolen debit card is replaced. When an account is relayed to Money Manager under a different name or identity in the past, it is created as a new account in Money Manager. The duplicate account can be merged with the previous account to ensure all data is retained.

NOTE: This action cannot be undone.

To merge duplicate accounts:

1. Determine which account is the original — it should have a longer transaction history than the new account.
2. In the “Account Details” view of the original account, tap the ••• icon on the top right and tap **Mark as Duplicate** from the dropdown.
3. Tap the duplicate account from the list of accounts that appears. A message will appear warning you that merging two accounts into one can’t be undone.
4. Tap **Merge**.
5. Type the word “**MERGE**” (in capital letters) and tap **Confirm** to complete the process.

a. On mobile, you can skip this step.