FinanceWorks Instructions

1. To access FinanceWorks, go to the KSCFCU website and select “Log On To FinanceWorks.”

2. Become familiar with how to use FinanceWorks by selecting “Take a Tour”.
   Icon is located on the bottom right hand corner of the screen.

3. Create a separate login for FinanceWorks that is separate from PCU.
   A. Select “Create an account for free”.
   B. Complete all fields and check the box to agree to the terms and conditions.
      *(**Do not** use your KSCFCU account number as your FinanceWorks User ID)*
      Note: If you receive the message “User ID already exists”, add additional information to your User ID that is specific to you.

4. Enter your KSCFCU User ID and password to download your accounts.
   Note: If you change your PCU password, you must update the KSCFCU password within FinanceWorks by going to “Accounts”.

5. Select your accounts.
   A. To unselect an account, click the check mark under next to the applicable account.
   B. To change an account type, click the drop down arrow (Ex. Savings, Checking etc.).
   C. Click Continue.

6. Select “Start using FinanceWorks”.

7. Add other accounts from KSCFCU or another financial institution:
   “Where else do you have accounts?” *(Located under Accounts on left side of screen)*
   Type in the first few letters of the institution name **or** select “List All” to see a complete listing of institutions that can be added.
   A. Select the applicable financial institution.
   B. If the institution is not listed and/or does not appear when you enter the initials, it cannot be added.
   C. You will need to know your login information to access and download the other institution.
   D. If you change your password with any of the websites you will need to update the password in FinanceWorks.

8. Go to the “Transactions” tab to categorize your transactions.
   Note: Some of the accounts will automatically be categorized and some will say “choose a category”.
   To change a category
   >Click in the “category” column for the item being updated
   >Click the drop down arrow
   >Select the applicable category
   Add a category
   >In the “Category + Add” column, click on “Add”
   >Click on “Add Category”
   >Scroll to the bottom and click Save and Close
   Separate a transaction into multiple categories
   >Choose the applicable transaction and click on the category
   >Edit Details
   >Add another category
   >Click the drop down and choose the applicable category
   >Enter the dollar amount
   >Save (A $ sign will appear next to the transactions amount)

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9. Go to the “Goals” tab to establish your spending goals.

Add a Goal

>Scroll to the bottom and select a category
>Click Edit
>Enter a dollar amount
>Save

Edit a Goal

>Click Edit
>Enter a dollar amount
>Save

Delete a Goal

>Click Delete

10. Go to the “Alerts & Options” tab to set up alerts and notifications.

Email

>Enter the email address where the notification is to be sent

Quick ‘n Easy Highlights

>Click in the box to receive a weekly email with customized spending insights, recent spending and up-to-date balances

For the following notifications you may choose to receive your alert by email and/or the FinanceWorks home page:

Spending Money

>Alert me if any checking account balances go below $_____ (Designate the amount)

Bill Reminders

>Alert me of upcoming transactions this many days ahead ____ (Designate the number of days)

Credit Card Spending

>Alert me if any credit card account balance goes above $____ (Designate the amount)

Budget Limits

>Alert me if the amount left to spend for any goal goes below $_____ (Designated the amount)

Large Expenses & Deposits

>Alert me if an expense clears for more than $_____ (Designate the amount)

>Alert me if a deposit clears for more than $_____ (Designate the amount)

>Click Save