



BUDGETING FOR INCOME AND EXPENSES SIMULATION:

3-Day

OPTIONAL STUDENT RESOURCE

The following screenshots should guide students through Mint:

- 1. Students log in but will not have to provide any personal information.
- 2. The Mint dashboard.
- 3. The Transactions tab.
- 4. Click to edit any transaction.
- 5. The left side of transaction allows to select a specific account.
- 6. Use the search bar to find a transaction.
- 7. The Trends tab, has various chart options listed on the left side.
- 8. Spending by category allows for analysis of transactions.
- 9. The Budget tab.
- 10. Adding pieces to a Budget in the Budget tab.

Intuit	intuit mint.		+ ADD ACCOUNTS SETTINGS PROFILE TOUR LOG OUT
🔇 mint 🚭 quickbooks 🔗 turbotax	OVERVIEW TRANSACTIONS	CREDIT SCORE	BILLS BUDGETS GOALS TRENDS INVESTMENTS WAYS TO SAVE
One Account. Everything Intuit. Sign in to your Intuit access all our products including Mint. Lear more	ACCOUNTS	٥	
Email or user ID	> 💽 Cash	\$4,500.00	DEC 1 MARK AS PAID MORTGAGE LOAN \$ 1,500.00 View Bill Details
Password	Credit Cards	- \$500.00	DEC 11 MARK AS PAID CREDIT CARD \$100 View Bill Details
Remember me	CREDIT CARD	400 .00 15 minutes ago	
🔒 Sign In	CREDIT CARD	100.00 15 minutes ago	Showing 2 of 2 bills due. See my bills

Figure 1 – Mint login screen

Figure 2 – Mint dashboard

\ ou h dd :	Cash & nave added another?	Credit Accounts 3 accounts.			SEARCH
отац \$4,	сазн 252.00	тотаl debt \$1,827.45			
		+ TRANSACTION			o
	Date 👻	Description	Category	Y	Amount
	JUN 7	SHOPHERE.COM ONLINE SHOPPING	Shopping 🗘		-\$40.00
	JUN 6	CITY WATER SUPPLY UNET DIE - WAT	Utilities		-\$40.00
	JUN 5	THE STUDENT DEBT COLLECTORS STU	Student Loan		-\$200.00
Earn	n 3% cash bac	k on transit (including rideshare). Terms apply.			Apply now
	JUN 4	JAVA SHOPPE COFFEE SHOP	Coffee Shops		-\$6.00
	JUN 3	HILLSIDE APARTMENTS RENT PAYMENT	Mortgage & Rent		-\$750.00
	JUN 2	Gas & Electric	Utilities		-\$100.00
	JUN 1	TRANSFER TO SAVINGS	Transfer		-\$250.00
	MAY 30	PAYCHECK!	Income		\$1,400.00
	MAY 30	BANK INTEREST CHARGE INTEREST ON	Finance Charge		-\$30.17
	MAY 30	INTEREST PAYMENT SAVINGS ACCOUNT	Interest Income		\$16.00
	MAY 29	TIKI HUT FAST FOOD	MAY 29 TIKI HU	JT FAST	FOOD
	MAY 28	CREDIT SERVICE PAYMENT CREDIT CA	MAY 28 CREDI MAY 28 TRANS MAY 27 Dollar	T SERVIC SFER FRC Shave C	DE PAYMENT CREDITO
igure	e 3 – Transo	actions tab	MAY 26 GROC	ERY GIA	



Figure 5 – Transactions left side, select only Checking or Credit Card.

	MAY 29	TIKI HUT FAST FOOD	Food & Dining 🗘	-\$25.00	TIKI HUT FAST FOOD
	MAY 28	CREDIT SERVICE PAYIMENT CREDIT CA	Auto & Transport	-\$60.00	DETAILS
	MAY 28	TRANSFER FROM CHECKING CREDIT C	Bills & Utilities Business Services	\$60.00	Account:
	MAY 27	Dollar Shave Club	Education	-\$18.00	Nibank for agg modernization - My
	MAY 26	GROCERY GIANT GROCERIES	Entertainment	-\$140.00	Checking
	MAY 25	SUPER SNIPS HAIRCUT	Fees & Charges	-\$25.00	You vs. US Avg
	MAY 24	THE GREASY SPOON EAST FOOD	Financial	612.00	\$28
_			Food & Dining	Alcohol & Bars	\$21
	MAY 23	GAS MART GAS/FUEL	Gifts & Donations	Coffee Shops	\$14
	MAY 22	SHIRTEXPRESS.COM ONLINE SHOPPING	Health & Fitness	Fast Food	\$7
	MAY 21	FAB ABS FITNESS GYM MEMBERSHIP	Home	Groceries	JUN
	MAY 20	ATM WITHDRAWAL ATM CASH WITHDR	Income	Restaurants	\$8.33
	MAY 19	UNIVERSAL WIRELESS UTILITIES BILL - C	Investments	Add/Edit Cate	HUT FAST FOOD
_			Nids	C24.00	Show all Food & Dining
	MAY 18	PRESS 'N CLEAN DRY CLEANING	Misc Expenses	-521.00	
	MAY 17	BAGEL PALACE RESTAURANT	Personal Care	-\$8.00	
	MAY 16	CITY OF MINTVILLE SPEEDING TICKET	Pets	-\$300.00	
	MAY 15	PAYCHECK!	Taxes	\$1,400.00	
	MAY 14	4-WHEELS LOAN AUTO LOAN	Transfer	-\$280.00	
	MAY 13	SHOP MART RETAIL SHOPPING	Travel	-\$75.00	
	MAY 10	GROCERY GIANT GROCERIES	Uncategorized	-\$90.00	
	MANY 8	GAS IT UP GAS/FUEL	Gas & Fuel	-\$50.00	

Figure 4 – Editing a transaction

Q	СН

Figure 6 – Search for a transaction







Figure 8 – Spending pie chart for analysis.

NS	CREDIT SCORE	BILLS	BUDGETS	GOALS	TRENDS	INVESTMENTS	WAYS TO SA
July 2	2019 SEP OCT NOV	/ DEC JAN	FEB MAR APR	This Year MAY JUN	All Time		
You'	re right on tra	ack with your	r July budge	t! Have yo	u thought		
			noney even i	Hiding: N	one (EDIT)		
+ (UREATE A BUDGET]	Sorting by	Category	•	You've b	udgeted

Figure 9 – The Budget tab	
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+ CREATE A BUDGET	
Choose a Category Auto Payment When will this happen? Every Month Every Few Months Once	Auto Payment spending • You vs. • US Avg
 Start each new month with the previous month's leftover amount Amount 280 We'll set a budget of \$280 each month for Auto Payment that 	FEB MAR APR MAY JUN JUL Historically you've spent about \$280/mo on Auto Payment. CANCEL SAVE

Figure 10 – Create a budget in the Budget tab.