

Getting Started Guide



www.cashflowinsite.com

Accepting an Invitation from your Advisor

1. Click [accept](#) from the email invitation. You will be directed to the Cashflow INSITE Invitation Accept Screen.
2. Click the [consumer](#) link to setup a new Cashflow INSITE account.
3. You will be presented with the sign up screen. Complete all fields.
4. Click [Submit] to create your account.
5. A confirmation screen will be displayed, click the [here](#) link to accept the invitation.
6. The Invitation Response screen will be displayed. Type the text displayed in the distorted image into the "Image Text" field. Click [Load].
7. Click [Accept].
8. Click [x].
9. Sign Out of Cashflow INSITE.

Sign In

1. An email has been sent to the address you provided during the sign-up process. Open the email (Cashflow INSITE-Personal Financial Manager).
2. Copy the temporary password provided in the email.
3. Go to www.cashflowinsite.com to sign in.
4. In the "User ID" field, type your User ID.
5. Paste your temporary password in the "Password" field.
6. Click [SIGN IN].
7. Provide your answer to one of the security questions.
8. Paste your temporary password in the "Current Password" field.
9. Type and re-type a new password (6-23 characters, including at least one number and special character).
10. Click [Change Password].
11. Click [Continue].
12. You will be presented with the [Welcome Page](#).

From: Cashflow INSITE [mailto:admin@cashflowinsite.com]
Subject: Cashflow INSITE - invitation from your advisor

Hello,

Cashflow INSITE Advisor "John Smith (john.smith@mail.com)" has sent you an invitation to become your Cashflow INSITE Advisor. This will allow your advisor to view your account information.

If you are not sure that you want an advisor for your account, you can still join up and use Cashflow INSITE on your own.

To learn more visit [Cashflow INSITE](#).

Please click [accept](#) or here to [reject](#).

Sign-up

Image: [Try a different image](#)

* Image Text:

* User ID:

* Email:

* Security Question 1:

* Security Answer 1:

* Security Question 2:

* Security Answer 2:

* Security Question 3:

* Security Answer 3:

I have read and agree to the Cashflow INSITE™ Terms Of Service and Cashflow INSITE™ Privacy Policy, and to receive important communications from Cashflow INSITE.

Fields marked with * are required.

cashflow insite
know your money

Consumer [Welcome](#) [My Activity](#) [My Budget](#) [My Account](#)

Invitation Response

Enter the value displayed in the picture below, and the invitation ID (if not already set below), and click "Load" to load the invitation detail and accept or reject it.

Images:

* Image Text: [Try a different image](#)

* Invitation ID:

Personal Financial Manager 1.2.5.7 [Terms of Service](#) [Privacy Policy](#)

Cashflow INSITE - Personal Financial Manager
Cashflow INSITE - admin@cashflowinsite.com

Thank you for creating a Personal Financial Manager account.

Your account has been created successfully. Your user ID is [redacted] and your new temporary password is displayed below.

[Q]LRS

You will be prompted to change this temporary password the first time you login.

Please note that an extra space sometimes gets included by email clients when highlighting text to copy. If you copy/paste the password, you may wish to type the password directly, rather than copying and pasting it.

If you have received this email in error, please send an email to admin@cashflowinsite.com.

Sign In

User ID:

Remember Me [\(Info\)](#)

Password:

[Forgot Your Password?](#)

Change Password

You have been successfully authenticated. However, your password has expired, or this is your first time signing into the application with a password that we sent to you by email. Please enter a new password now to proceed. [Learn more](#)

Choose a security question:

Enter your answer:

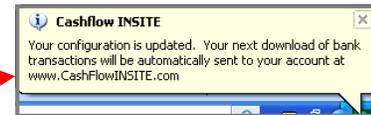
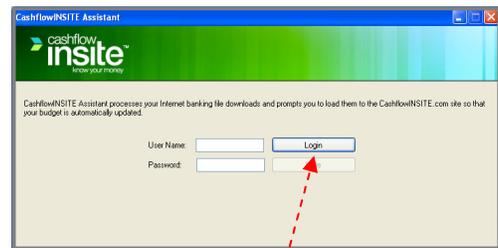
Current Password:

New Password:

Confirm New Password:

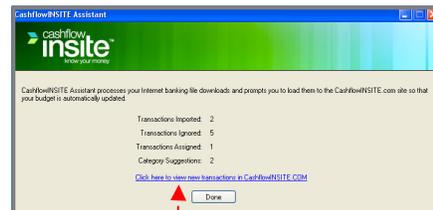
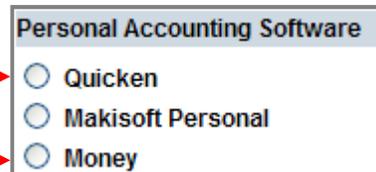
Downloading the Cashflow INSITE Assistant

1. While signed into your Cashflow INSITE account go to My Activity > Import.
2. Click the link [Cashflow INSITE Assistant](#).
3. Click the link [Click to download Cashflow INSITE Assistant](#).
4. On the following download screens Click ([Run], [Run], [Next], select folder and click [Next], [Next], [Close]).
5. Click on your Windows "start" Menu.
6. Select "All Programs" > "Cashflow INSITE".
8. Click on "Shortcut to CashflowINSITE Assistant.exe".
9. Click [Okay], the Assistant screen will be displayed.
10. Enter your User ID and Password.
11. Click [Login].
12. Your next download of transaction will automatically be sent into your Cashflow INSITE account.



Downloading Transactions

1. Log into your online banking or credit card site.
2. Locate the area of your banking or credit card site that allows you to download your transactions.
3. Select either a Quicken (QFX) or Money (OFX) file format.
4. Select the account/s and time period you would like imported into Cashflow INSITE (a time period of around 2 months is preferred for your first download).
6. Click [Download].
7. The Cashflow INSITE Assistant will automatically open and import your transactions into Cashflow INSITE.
8. Click the link [Click here to view new transactions in CashflowINSITE.com](#).
9. You will be brought into the Transactions Page of your Cashflow INSITE account. You can begin to categorize your newly imported transactions.



**The download process will vary from one institution to another.*

A more in depth review of Cashflow INSITE and its features can be found at www.cashflowinsite.com