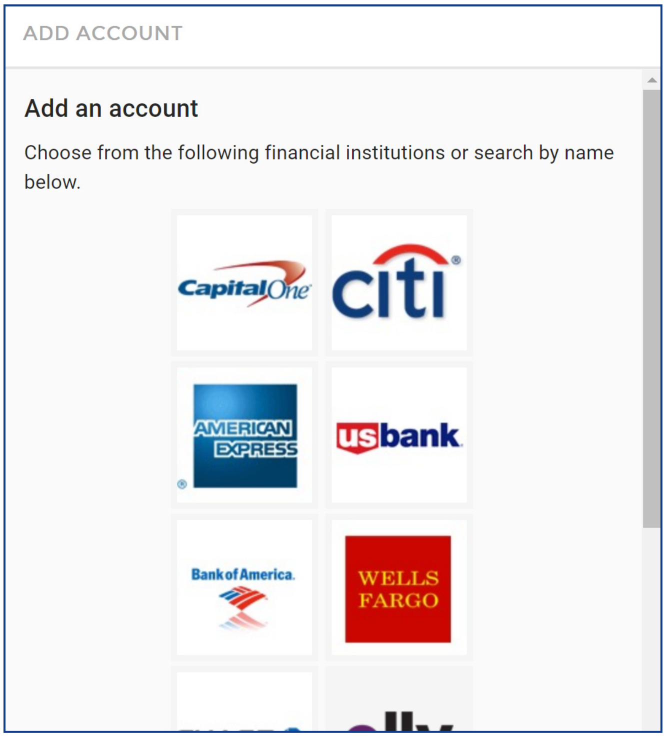
Kish TotalView Quick Start Guide



ADD AN ACCOUNT

Easily link your accounts from other financial institutions for a complete financial picture.

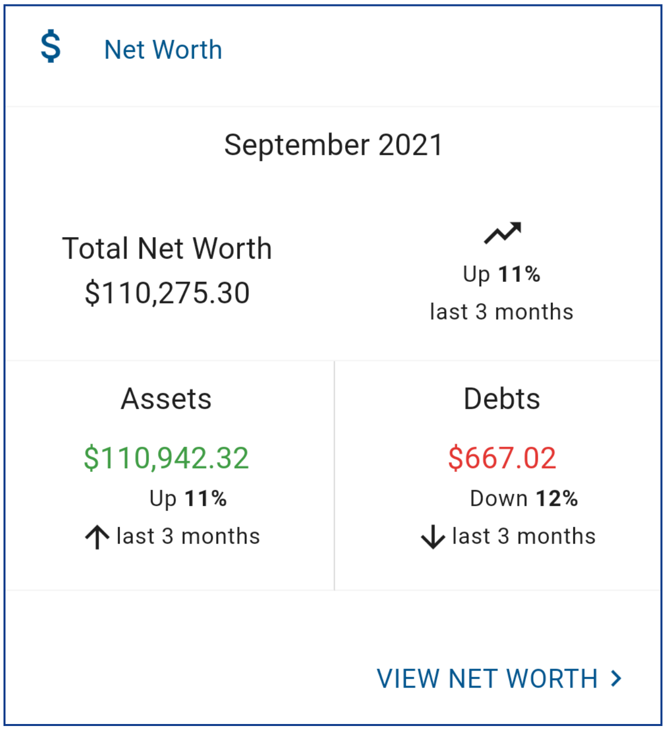
Step 1: Navigate to My Accounts and click the plus sign to “Add New Account”

Step 2: Select an institution or use the search to find your institution.

Step 3: Enter the required credentials and select “Connect” to add the account.

Please note that Kish credit cards must be linked by searching "Elan Card." Kish Financial Solutions accounts are currently not linkable.

⚠ You may find that some other accounts, such as Discover, are unavailable. This is due to that institution’s decision not to allow external access to customer data.



NET WORTH

Net Worth gives a complete overview of your assets and liabilities. Your Kish Bank accounts will display automatically, and other accounts will display after being linked.

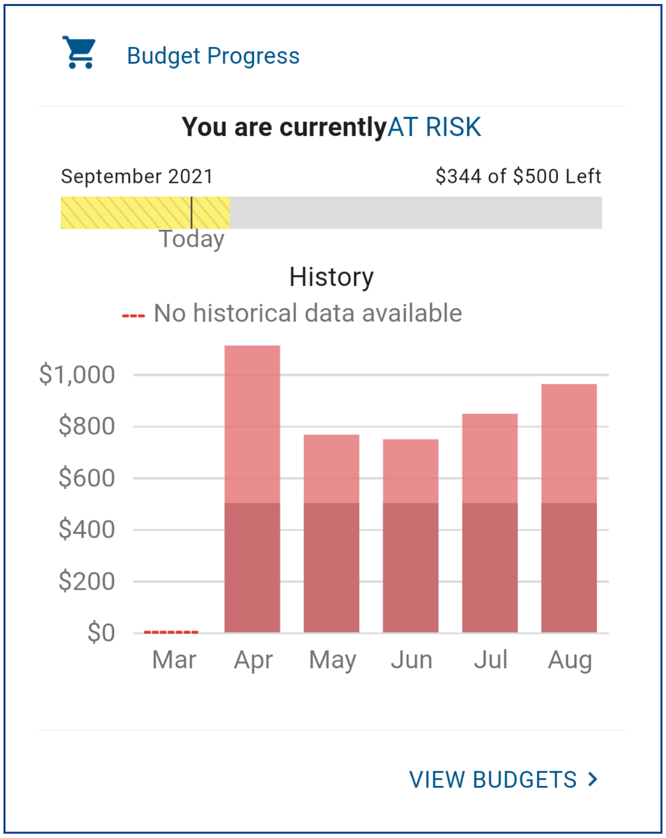
You can also add assets and liabilities manually without linking to a financial institution.

Step 1: Click "View Net Worth" at the bottom of Net Worth.

Step 2: Select "Add Asset" or "Add Liability."

Step 3: Enter a name and amount for the asset or liability.

Step 3: Click "Save" to add the asset or liability.



BUDGETS

Setting budgets helps keep your spending on track. Users can select "View Budgets" to add a new budget, edit an existing budget, and create budget alerts.

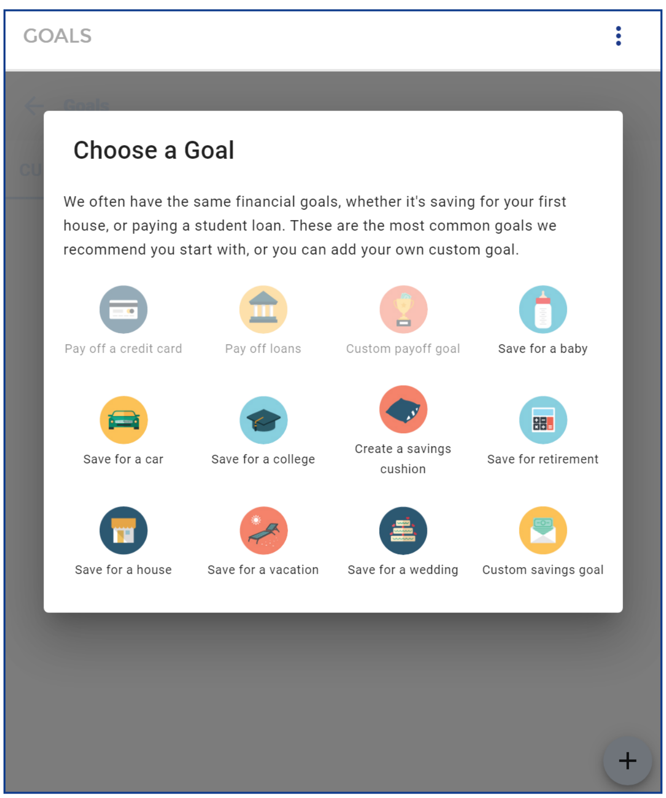
Step 1: Navigate to Budgets and select "Add Budget."

Step 2: Select the tag (spending category) you would like to track.

Step 3: Enter a name and monthly limit, set up an optional alert, and choose accounts to monitor.

Step 4: Click "Finish" to add the new budget.

To edit or delete a budget, select the budget and click "Edit Budget."



GOALS

Create savings goals, like saving for a vacation or a house, or a debt reduction goal, like paying off a loan or a credit card.

Step 1: Navigate to Goals and select “Add Goal.”

Step 2: Select your desired savings or pay-off goal.

Step 3: Fill in the required information for your goal.

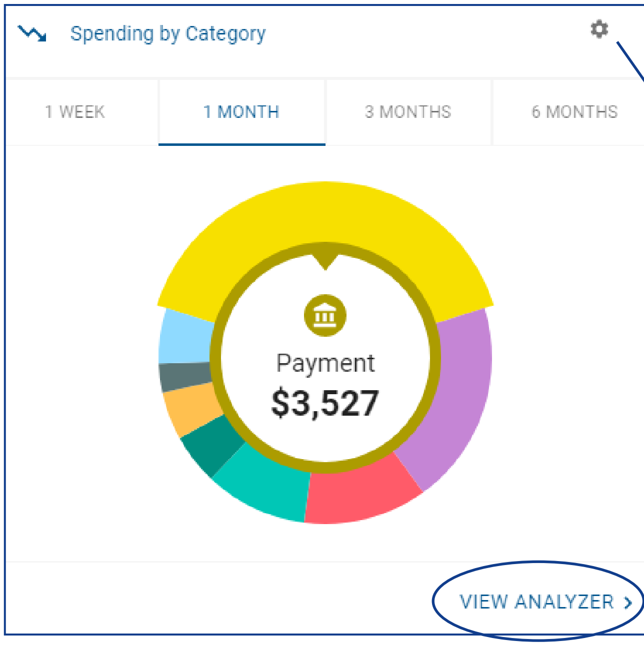
Step 4: Click “Save” to add the new goal.

Your Goal Summary will update the completion date and amount needed per month according to your preferences. Goals will automatically update with your progress and will reflect your day-to-day account balances in TotalView.

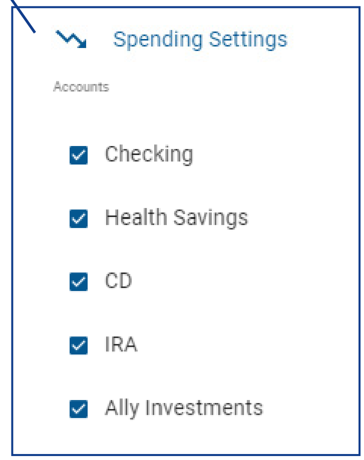
SPENDING WHEEL

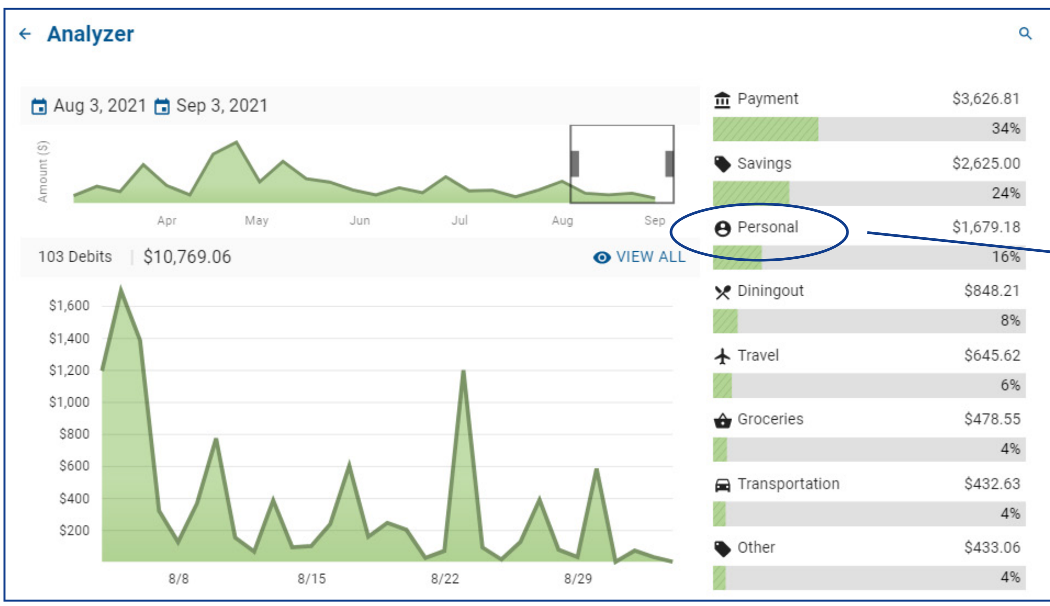
The Spending Wheel displays a summary of your spending habits by category during the past week, month, 3-month, and 6-month periods.

Transactions are automatically categorized based on origin and type. Users can personalize categories for each type of transaction.



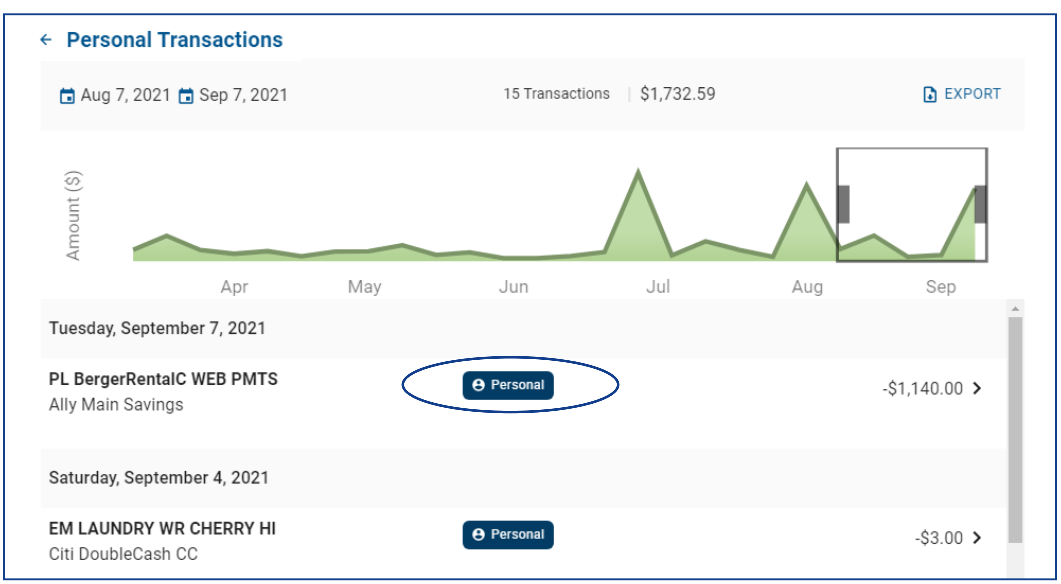
Select which accounts appear on the Spending Wheel within Spending Settings.





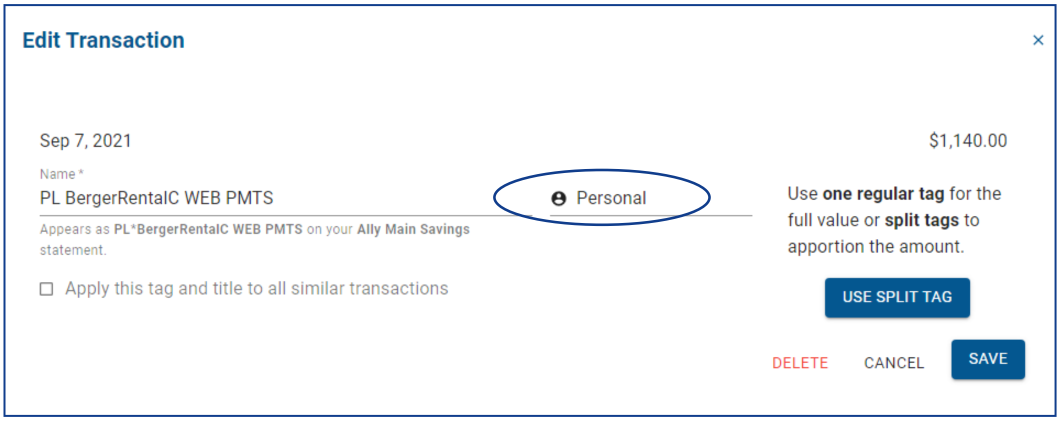
Step 1: Click "View Analyzer" under the wheel to view a detailed breakdown.

Step 2: Click on a category listed on the right (or on the previous screen, click on a section of the wheel).



Step 3: Click on a transaction.

(Continued on next page.)



Step 4: Click on the tag to rename it. Either choose from the options listed or customize your own.

Step 5: Click "Save" to apply the changes.

CASHFLOW

Cashflow brings your budget to life through an interactive calendar.

Step 1: Navigate to Cashflow.

Step 2: Click the plus sign to "Add Income" or "Add Bill."

Step 3: Enter in the required information and select "Save."

The Cashflow calendar can only be modified on a computer at this time. Access it through the TotalView option in the main menu.

For assistance with TotalView, please contact our Client Solutions Center at 1-800-981-5474.

KISH BANK expect more

1-800-981-5474
www.KishBank.com

09/2021