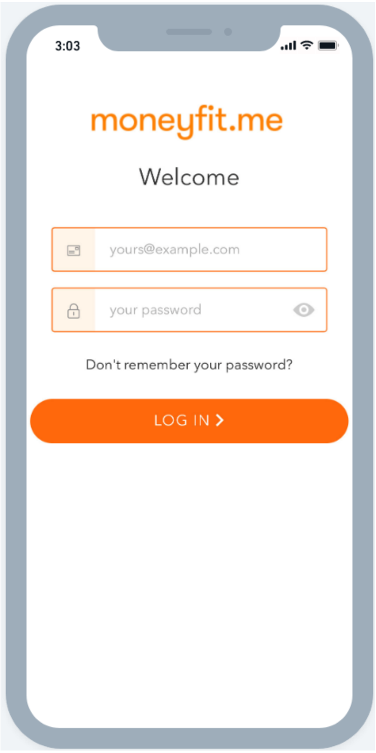
moneyfit.me

MONEYFIT BANK SET-UP GUIDE

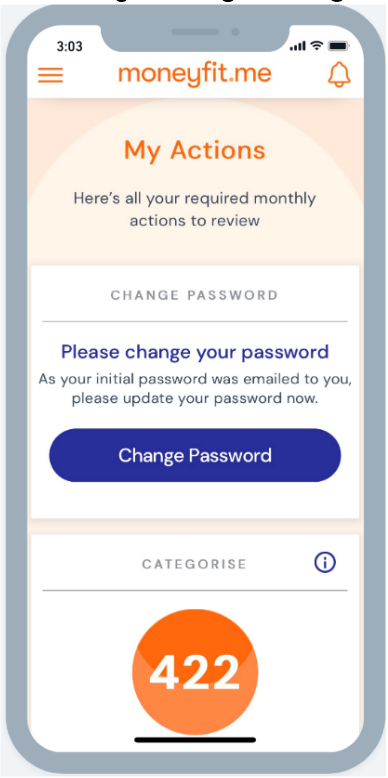
ADDING YOUR BANK TO MONEYFIT

1. Ensure that you have Moneyfit.me downloaded from your device's app store

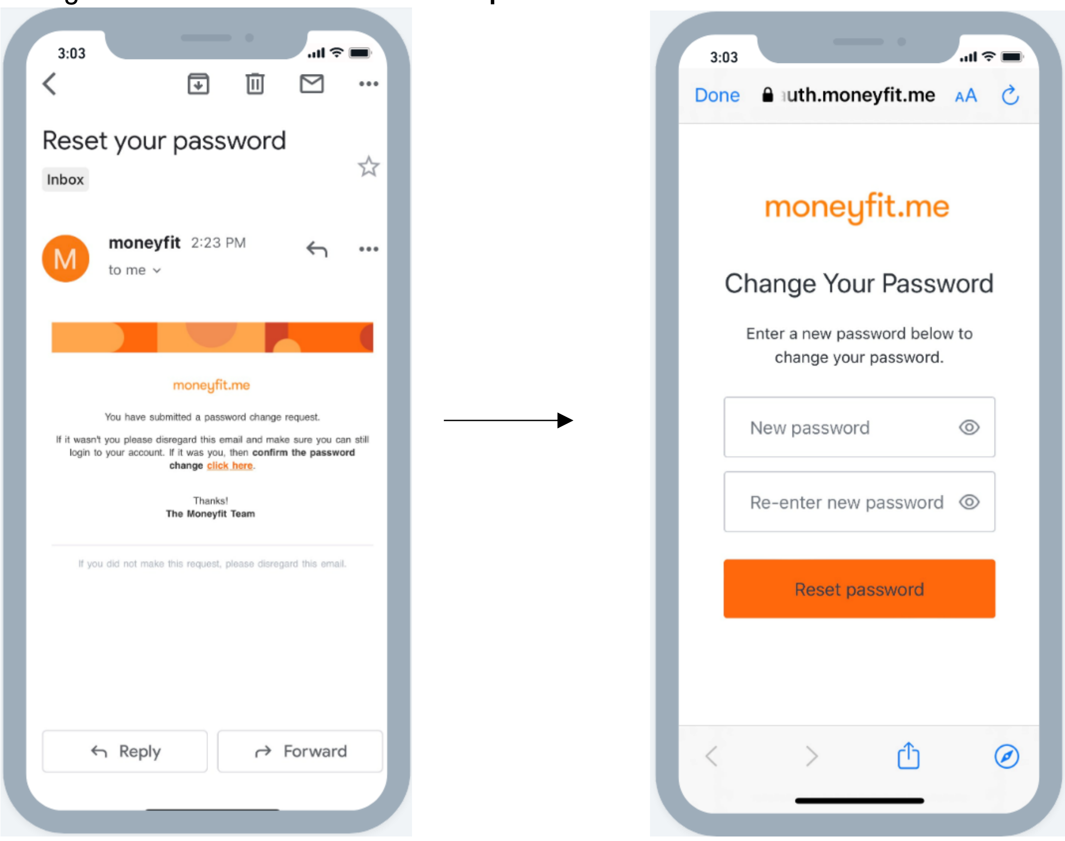
2. Login into your account using the moneyfit email address you registered with and the default password that was sent to you via email, you will be asked to re-set a new password once logged in for security reasons.



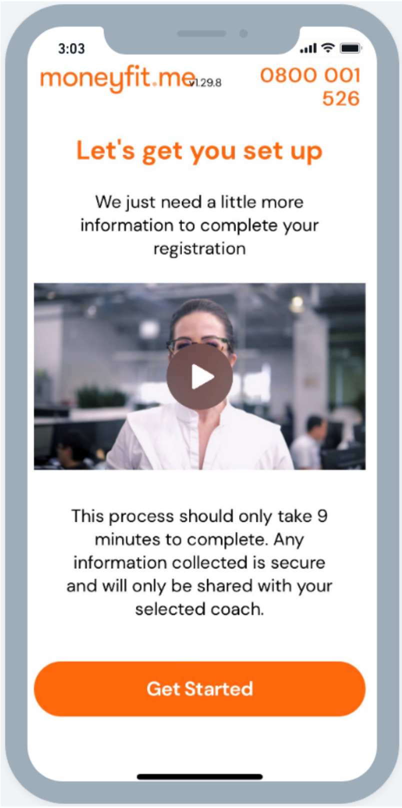
3. You will be asked to reset this after your initial log in for security reasons, you can do this by clicking **'Change Password'.**



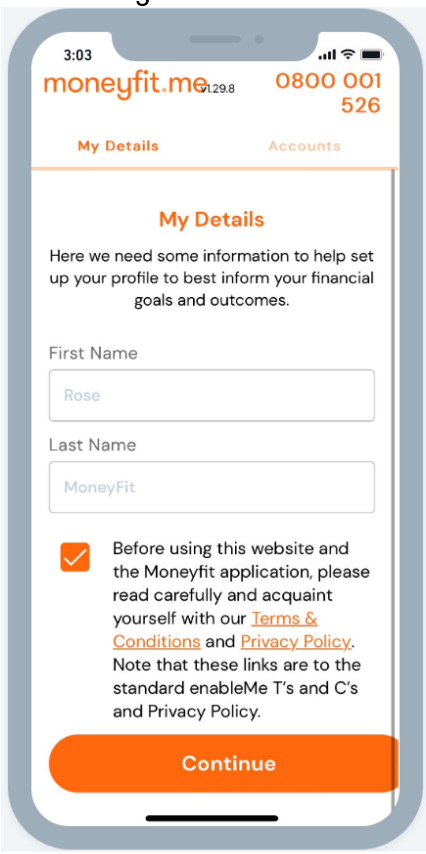
4. It will send a reset password link to your email, confirm the password change by clicking **'Click Here'.** It will redirect you to a new window to change your password. One you have done this click **'Re-set password'.**



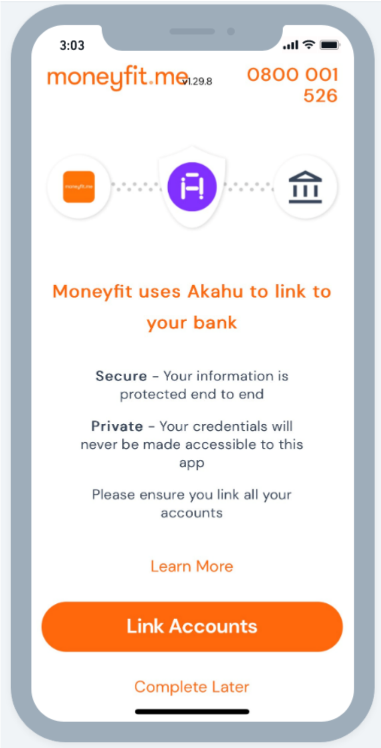
5. Click **'Get Started'.**



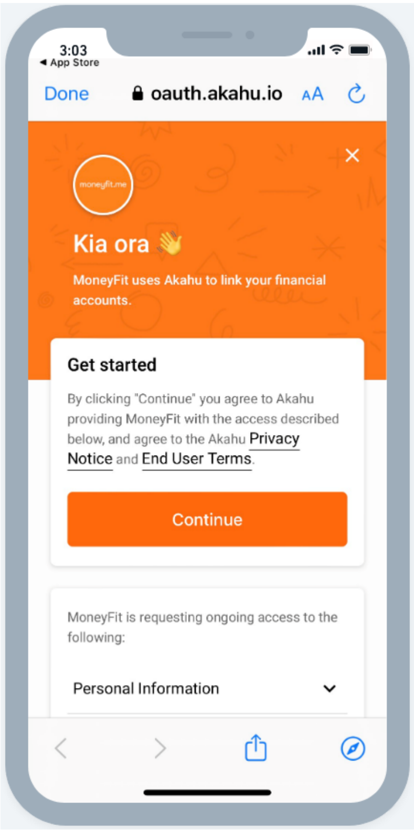
6. Enter in your details and select continue **'Continue'.**



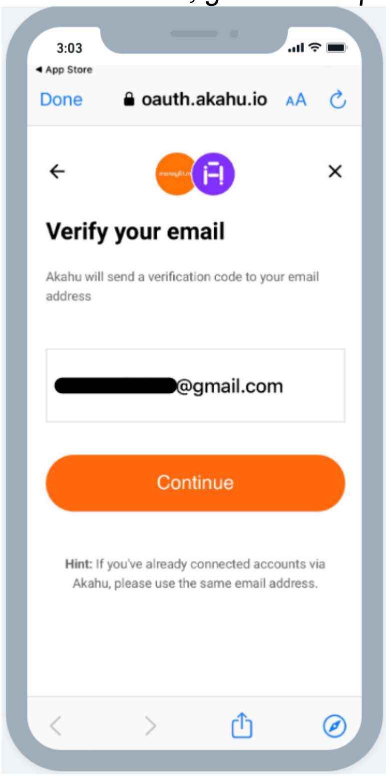
7. Click **'Link Accounts'**



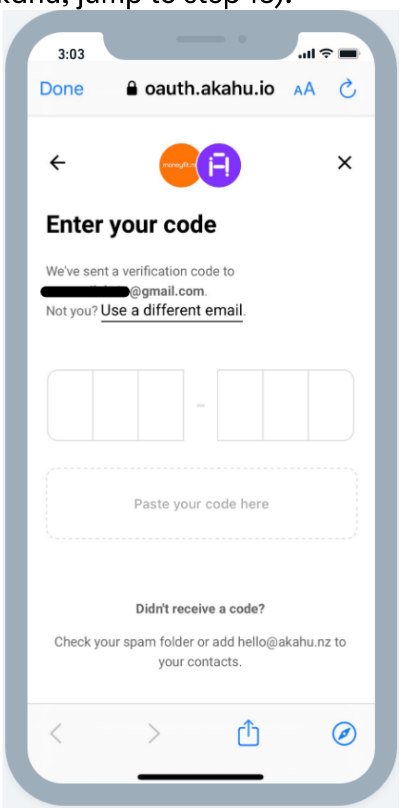
8. You will be taken to the Akahu Connect interface pop-up window.
Note: Consenting to Akahu to access your bank will allow Moneyfit to gain access to ensure all transactions flow through, click ***'Continue'***



9. Enter your email address.
   Note: If you have already used Akahu (e.g., PocketSmith) to previously link your bank accounts, you'll be required to enter in the same email address

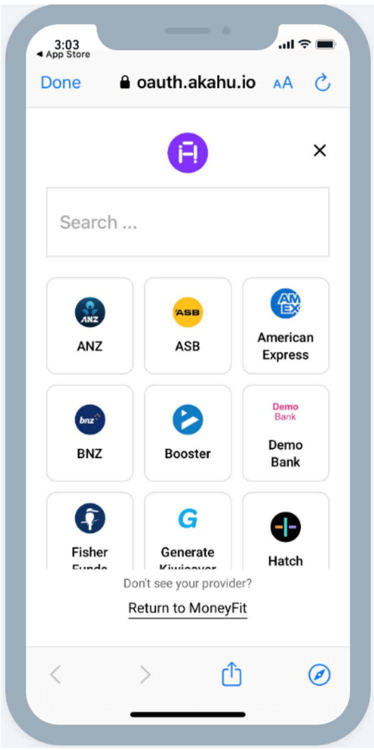


10. Enter in the six-digit verification code sent to your email address (If you have used Akahu, jump to step 13).

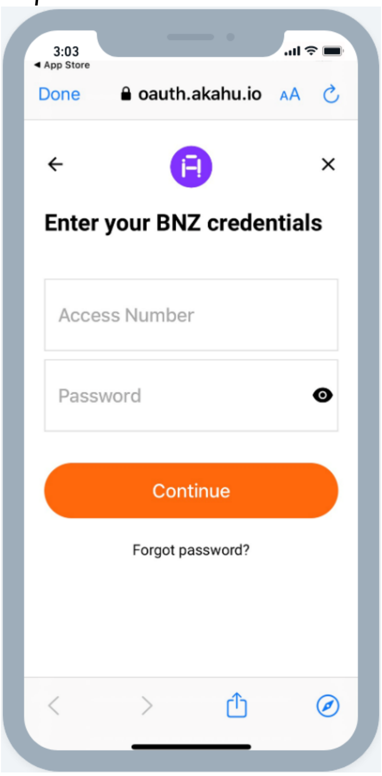


11. Select your bank.

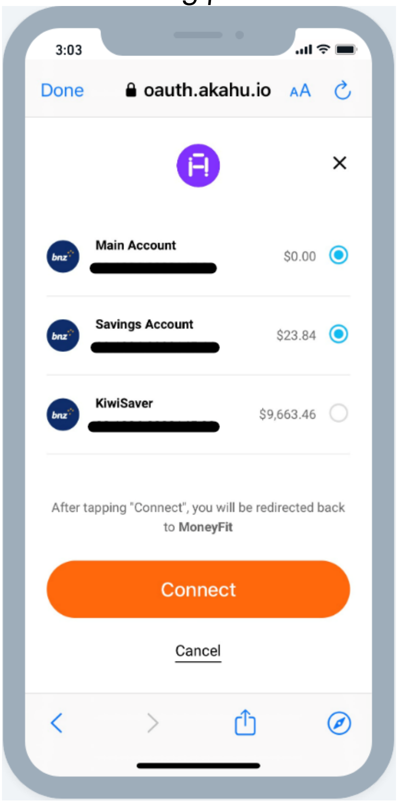
Note: if you are unable to find your bank, this may be a matter of Akahu not supporting that bank connection, please get in contact with your Coach or email support@enable.me .



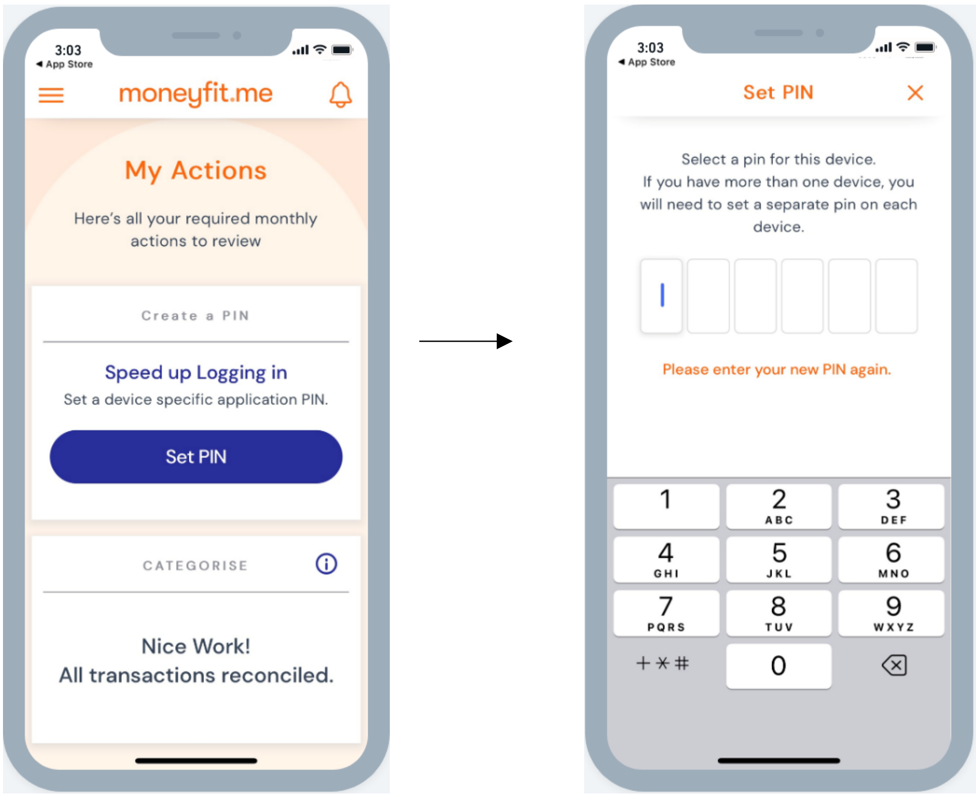
12. Enter your bank credentials (this is the same credentials you use to log into your online banking) and click **'Continue'**.
    Note: If required, some banks require additional verification like a pin, asks security questions or Multi-factor Authentication after credentials is entered.



13. Each of your bank accounts will be listed. Tick all accounts you'd like to connect to moneyfit and Click '**Connect'.**
Akahu will then redirect you back to moneyfit where you will have finished the onboarding process.

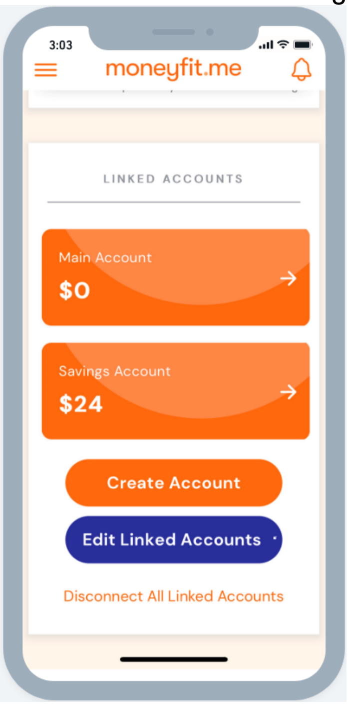


*Extra for experts: To speed up the login process next time you login, set-up a 6-digit pin by clicking **'Set Pin'**.*

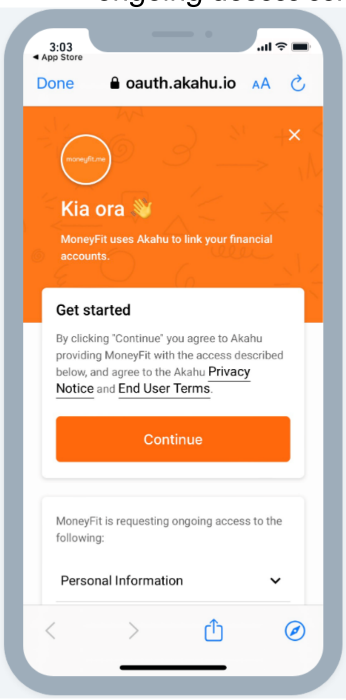


EDITING LINKED MONEYFIT ACCOUNTS

1. Go to ‘**My Accounts’**
2. Scroll down to the very bottom of the page and click ‘**Edit Linked Accounts’**

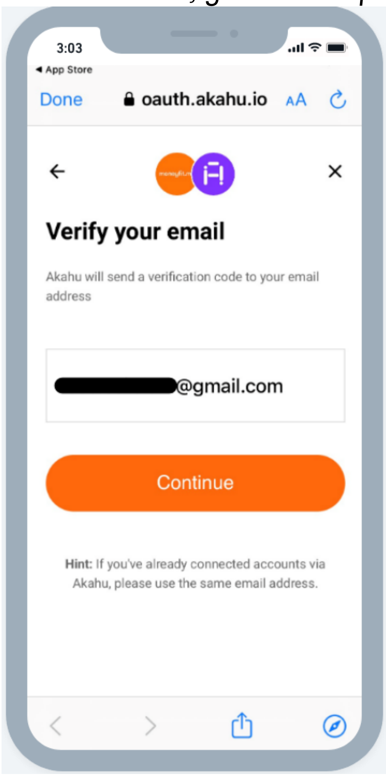


3. You will be taken to the Akahu pop-up window.
   Note: If you consent for Akahu to access your bank data and provide MoneyFit ongoing access select ***‘Continue’.***

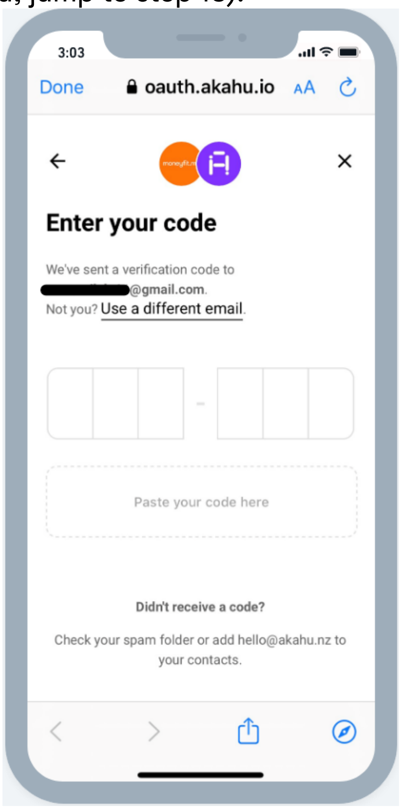


4. Enter your email address.

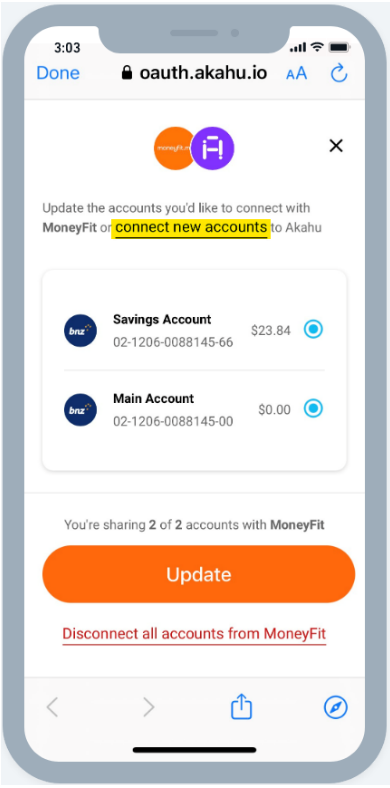
   Note: If you have already used Akahu (e.g., PocketSmith) to previously link your bank accounts, you'll be required to enter in the same email address



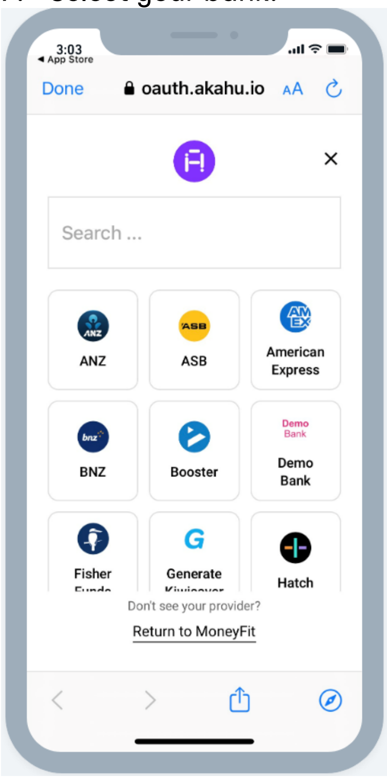
5. Enter in the six-digit verification code sent to your email address (If you have used Akahu, jump to step 13).



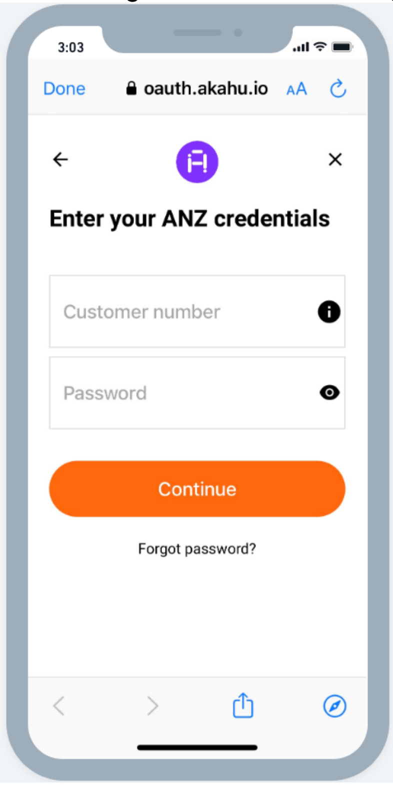
6. Click **'Connect new accounts'** to Akahu.



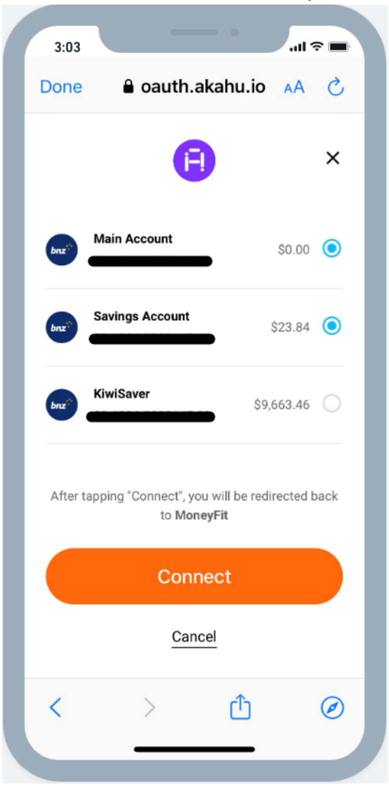
7. Select your bank.

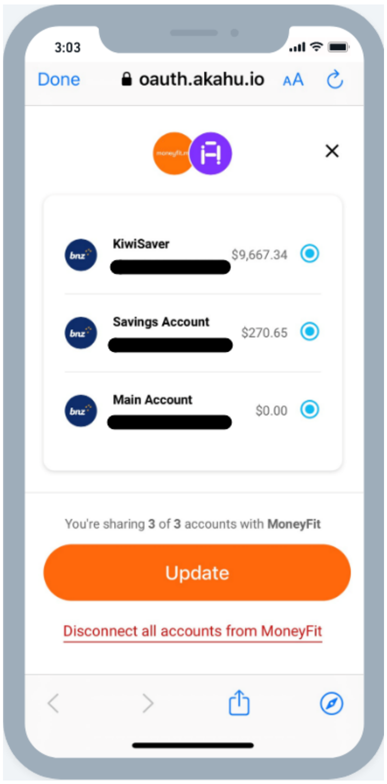


8. Enter your credentials for your secondary bank and click ‘**Continue**’.



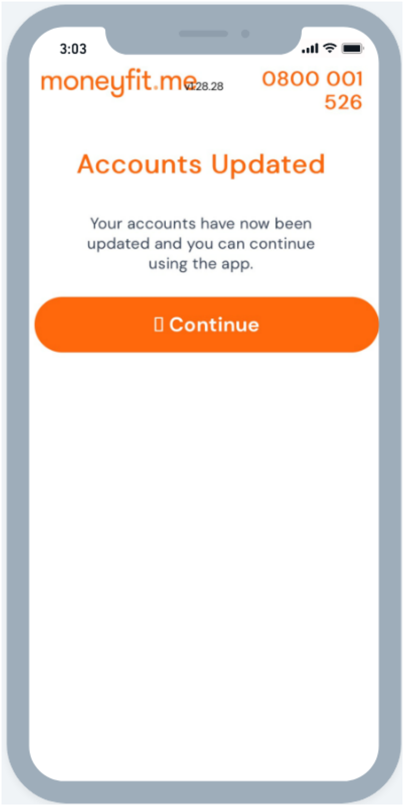
9. Tick all accounts you would like to make available to PocketSmith. Scroll down to access all accounts, then select ‘**Connect**’.





*Note: It will redirect you back to the list of your accounts already linked to PocketSmith and these new ones you have selected, you may need to select the new accounts again by making sure the circle on the right is blue before clicking **“Update”**.*

10. Click **'Continue'**



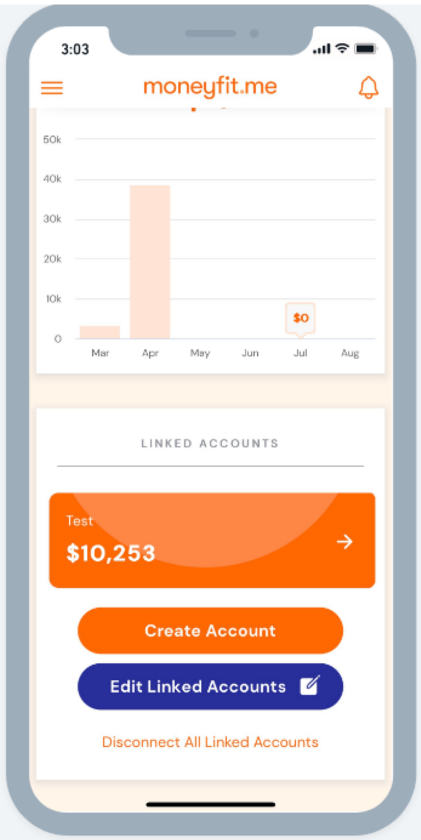
IF YOUR BANK ACCOUNT IS NOT AVAILABLE ON AKAHU PLEASE FOLLOW THE STEPS BELOW:

HOW TO DOWNLOAD CSV/OFX FILES FROM YOUR ONLINE BANKING

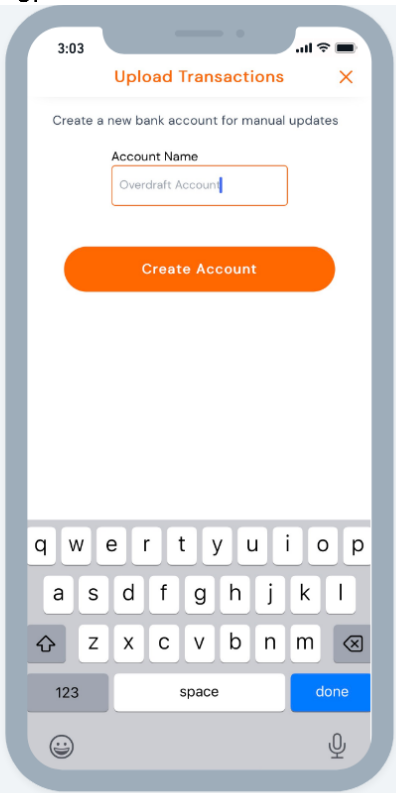
1. Log-in to your online banking
2. Select the account you want to download (Please download accounts separately)
3. You may need to go to a "view statements" or "view transaction history" if you cannot click into your account by just selecting it to see the transactions.
4. Insert date range required in the search *example; September19th 2021 – October 23rd, 2022.*
5. Click export or save (this should automatically save on your PC to default place in downloads)

HOW TO MANUALLY ADD IN AN ACCOUNT

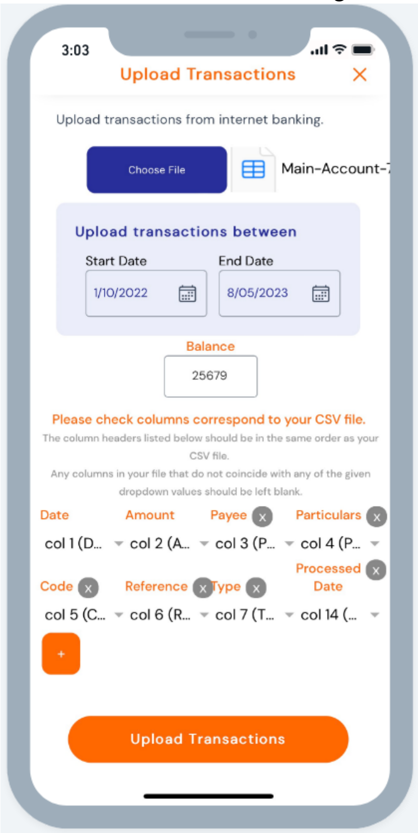
11. Go to '**My Accounts**'
12. Scroll down to the very bottom of the page and click '**Create Account**'.



13. Type in an Account Name and click **'Create Account.'**



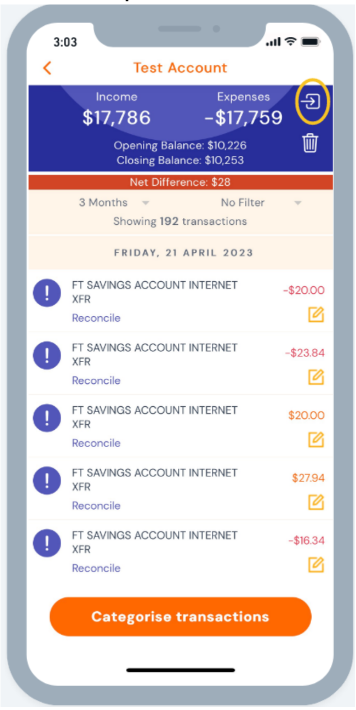
14. Adjust the date range and then click **'Choose File.'**
Note: Ensure that the file you are uploading is either a CSV file or OFX format



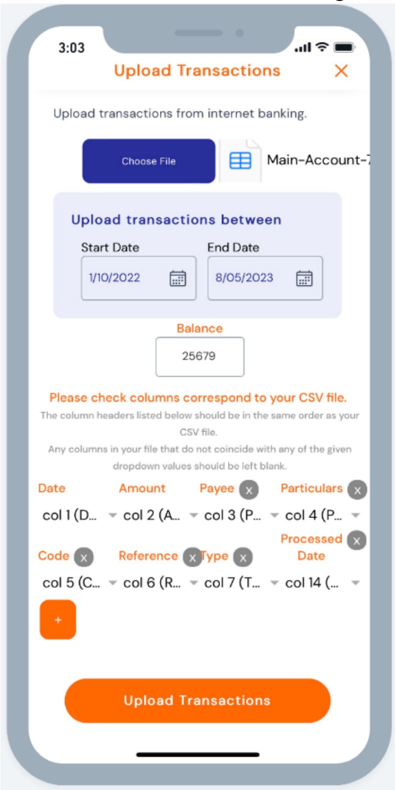
15. Double check that the columns are correct then Select **'Upload Transaction.'**

HOW TO MANUALLY UPLOAD TRASNACTIONS

1. Go to the ‘**My Accounts**’
2. Scroll down to the bottom of the screen and click on the bank account you want to do a manual upload for.



3. Click the upload button on the top right-side corner.
4. Adjust the date range and then click **‘Choose File.’**
   Note: Ensure that the file you are uploading is either a CSV file or OFX format



5. Double check that the columns are correct then Select **‘Upload Transaction.’**