MONEYFIT BANK SET-UP GUIDE

ADDING YOUR BANK TO MONEYFIT

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

3:03	■ \$ In.
Q moneyfit.me	Cancel
Financial Coach In	n Your Po
a sendor	a mangline a
money/R.me	0
	Extension Server
	₫ Q
roday Games Apps	Arcade search

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.

	3:03		II 🗢 🔳	
L		moneyfit.me		l
L		Welcome		l
L		yours@example.com		l
L	ð	your password	•	l
L	D	on't remember your password'	?	l
		LOG IN >		l
L				l
L				l
L				l
L				l

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'.

3:03	3:03 .ul ♀ ■ Done ● uth.moneyfit.me AA ♂
Reset your password	
moneyfit 2:23 PM ~ ··· to me ~	Change Your Password
	Enter a new password below to change your password.
moneyfit.me You have submitted a password change request. If it wasn't you please disregard this email and make sure you can still login to your account. If it was you, then confirm the password	New password
Thanks! The Moneyfit Team	Re-enter new password 💿
If you did not make this request, please disregard this email.	Reset password
← Reply ← Forward	< > 🖞 🥥

5. Click 'Get Started'.



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

3:03		°
mon	eyfit.me _{129.8}	0800 001 526
Му	Details	Accounts
	My Detai	ls
Here w up you	e need some inform r profile to best info goals and outco	ation to help set rm your financial omes.
First N	ame	
Rose		
Last N	ame	
Mone	eyFit	
	Before using this the Moneyfit app read carefully and yourself with our <u>Conditions</u> and <u>P</u> Note that these li standard enable and Privacy Polic	website and lication, please d acquaint <u>Terms &</u> rivacy Policy. nks are to the de T's and C's y.
	Contin	ue

7. Click 'Link Accounts'

3:03 ull ♀ ■ moneyfit.meizaa 0800 001 526
Moneyfit uses Akahu to link to
your bank
Secure - Your information is protected end to end
Private - Your credentials will never be made accessible to this app
Please ensure you link all your
Learn More
Link Accounts
Complete Later

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'**

3:03 pp Store
× - V (marked)
Kia ora W MoneyFit uses Akahu to link your financial accounts.
Get started By clicking "Continue" you agree to Akahu providing MonevFit with the access described
below, and agree to the Akahu Privacy Notice and End User Terms.
MoneyFit is requesting ongoing access to the
following: Personal Information

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

3	:03		- •	I 🗢 🔳
< App	Store	oauth.a	akahu.io	AA Ĉ
÷			Ð	×
Ve	erify y	our em	ail	
Aka add	hu will sen Iress	d a verificatio	on code to you	r email
		00	gmail.com	
		Cont	inue	
	Hint: If you Akahu, ple	've already cr ease use the	onnected acco same email ad	unts via Idress.

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.

3:03 App Store		ali ≎ ■
Done 🔒	oauth.akahu	.io 🗚 🖒
	•	×
Search		
ANZ ANZ	<mark>АБВ</mark> ASB	American Express
bazi BNZ	Booster	Demo Bank Demo Bank
Fisher Euroda	G Generate Viviaovor	Hatch
R	eturn to MoneyF	<u>iit</u>
<	> (†	

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.

3:03 App Store		- •	
Done	a oauth.a	kahu.io	AA Ĉ
÷	E		×
Enter yo	our BNZ	creder	tials
Access	Number		
Passwo	ord		O
	Conti	nue	
	Forgot pas	sword?	
		•	
<	>	Û	Ø

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'**.

3:03 ▲ App Store	3:03 App Store	•	all 🗢 🗖
\equiv moneyfit.me \bigcirc		Set PIN	×
My Actions Here's all your required monthly actions to review	Selec If you have will need to	t a pin for this d more than one set a separate device.	evice. device, you pin on each
Create a PIN			
Speed up Logging in Set a device specific application PIN.	Please e	nter your new Pl	N again.
Set PIN			
	1	2 	3 DEF
CATEGORISE	4 вні	5 JKL	6 MN0
	7 PORS	8	9 wxyz
Nice Work!	+ * #	0	\otimes
Air transactions reconciled.			

EDITING LINKED MONEYFIT ACCOUNTS

- 1. Go to 'My Accounts'
- 2. Scroll down to the very bottom of the page and click 'Edit Linked Accounts'

3:03	_	- •		
\equiv	money	fit.me	¢	
	. ,		U	
	LINKED AC	COUNTS		
Mair				
\$0			\rightarrow	
Savi	ngs Account			
\$2	4		÷	
	Create A	ccount		
	dit Linked	Account		
	art Enikeu i	Account		
Dise	connect All Lir	nked Acco	ounts	

- 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'.**

Kia ora MoneyFit uses Akahu to link your financial accounts.
Get started
By clicking "Continue" you agree to Akahu providing MoneyFit with the access described below, and agree to the Akahu <u>Privacy</u> <u>Notice</u> and <u>End User Terms</u> .
Continue
MoneyFit is requesting ongoing access to the following:
Personal Information

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

3	:03	_	- •	all 3	-
Do	ne 🕯	oauth.	.akahu.io	AA	C
÷		menegitur	Ð		×
V	erify yo	our en	nail		
Aka ado	ahu will send Iress	l a verificat	ion code to y	our emai	I
		0	gmail.co	m	
		Con	tinue		
	Hint: If you'	ve already (connected ac	counts v	ia
	Akahu, ple	ase use the	e 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.'

3:03							.ul 🤋	
		Upload Transactions X						
Crea	te a n	ew ba	ink ac	count	for m	anual	updat	es
		Accou Overc	nt Na draft A	me \ccoun	(
		с	reat	te Ac	count	t		
C W		r		t v	(1		i	
q w	е	r		t y	/ι	1	ic	p p
q w a	e s	r d	f	t y g	/ L h	ı j	i c k	p I
q w a \$	e s z	r d x	f c	t y g v	/ L h b	j n	i c k m	
q w a む 123	e s z	r d x	f c	t y g v space	/ L h b	j n	ic k m	p I X

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

3:03 upload Transactions X					
Upload transactions from internet banking.					
Choose File Main-Account-7					
Upload transactions between					
Start Date End Date					
1/10/2022					
Balance					
25679					
Please check columns correspond to your CSV file.					
The column headers listed below should be in the same order as your CSV file.					
Any columns in your file that do not coincide with any of the given					
Date Amount Payee x Particulars x					
col 1 (D col 2 (A col 3 (P col 4 (P					
Processed 🗙					
Code Reference Type Date					
сого (С.,, т сого (к.,, т сог / (1.,, т сог 14 (.,, т					
_					
Upload Transactions					

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.

	Income Expe \$17,786 -\$17	nses ,759	Ð
	Opening Balance: \$10,220 Closing Balance: \$10,253	6 I	Ŵ
	Net Difference: \$28		
	Showing 192 transaction	s	Ť
	FRIDAY, 21 APRIL 202	2.3	
0	FT SAVINGS ACCOUNT INTERNET		\$20.00
	Reconcile		Ø
0	FT SAVINGS ACCOUNT INTERNET		-\$23.84
•	Reconcile		Ø
0	FT SAVINGS ACCOUNT INTERNET		\$20.00
	Reconcile		Ø
0	FT SAVINGS ACCOUNT INTERNET		\$27.94
	Reconcile		Ø
0	FT SAVINGS ACCOUNT INTERNET		-\$16.34
	Reconcile		Ø
	Categorise transacti	ons	

- 3. Click the upload button on the top right-side corner.
- 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

3:03 Upload Tr	ansactions X				
Upload transactions from internet banking.					
Choose File	Main-Account-7				
Upload transacti	ons between				
Start Date	End Date				
1/10/2022	8/05/2023				
Ba	lance				
2	5679				
The column headers listed below	v should be in the same order as your				
C	SV file.				
Any columns in your file that do	o not coincide with any of the given				
Date Amount	Pavee Particulars				
col 1/D = col 2/A					
COIT(D + COI2 (A	+ COI 3 (F + COI 4 (F +				
Code Reference	x Type x Date				
col 5 (C., - col 6 (R., - col 7 (T., - col 14 (
•					
Upload Transactions					

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