

Ray Onishi
CSE300
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How to make a budget on Mint

If you've ever had times where you suddenly realized that you spent way too much money on something, this guide is for you. When managing your finances, an important part of that is to set up a proper budget, the amount of money set aside for specific purposes like groceries. That's where tools like Mint can be very handy. Instead of having to manually keep track of your budget and expenses yourself, you can have Mint handle all of that for you while also having a tool that makes managing all your finances easier.

Materials Required

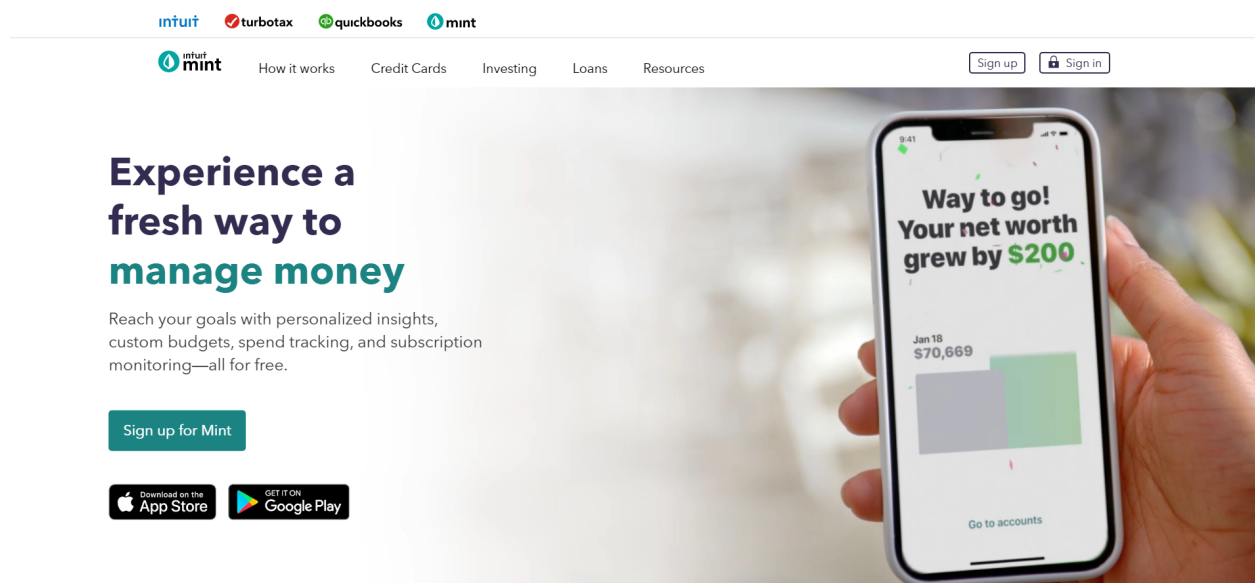
- A laptop or desktop computer
- Internet access
- Login information for your financial accounts (banks, brokerages, etc)

Warnings

- Do not share any of your login information or account information to anyone, it is imperative that only you have access to this
- Make sure you are on [mint.intuit.com](https://www.mint.intuit.com) before proceeding with any instructions past Step 1, scam websites exist that mimic the website and steal your information

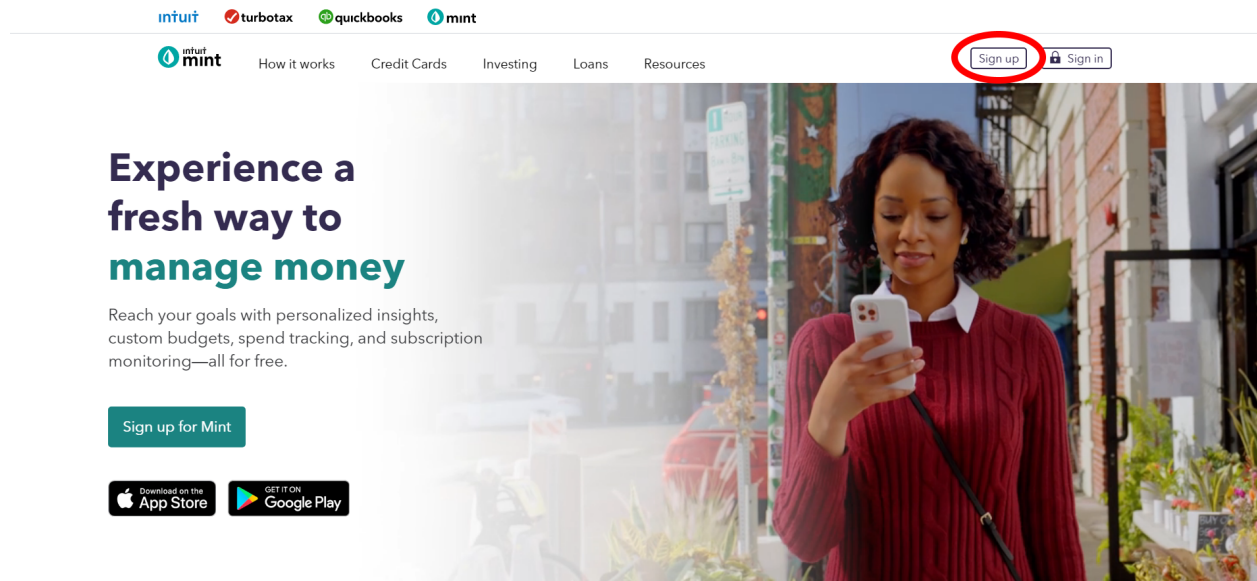
Step 1

Navigate to www.mint.intuit.com



Step 2

Click on the **Sign Up** button as highlighted in the image (or login if you already have an account)



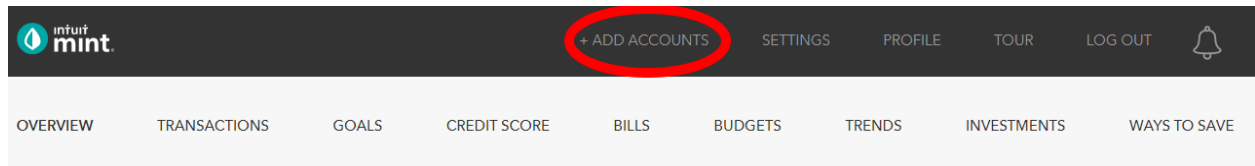
Step 3

Fill out the relevant information and press **Create Account** to finish the signup process

A screenshot of the Intuit account creation form. The form is titled 'Create an Intuit account' and includes the following fields: 'Email address', 'Phone (recommended)', and 'Password'. Below the 'Phone' field, there is a note: 'Standard call, message, or data rates may apply.' At the bottom of the form, there is a blue button labeled 'Create Account' with a lock icon. Below the button, there is a line of text: 'By selecting Create Account, you agree to our Terms and have read and acknowledge our Global Privacy Statement.' The Intuit logo and logos for 'mint', 'quickbooks', and 'turbotax' are displayed at the top of the form.

Step 4

Click on **+ ADD ACCOUNTS** from the navigation bar at the top of the screen (highlighted)



Step 5

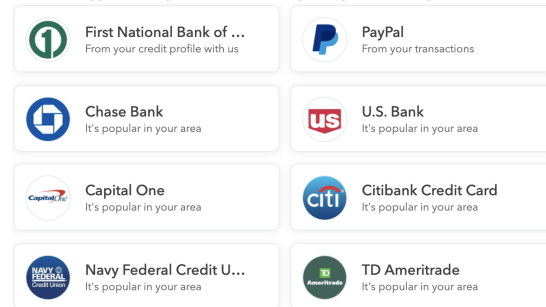
Search for and click on the financial institutions that you use such as banks, brokerages, and follow the instructions provided for each

Choose an account to link

Connect your **banks, bills** and **credit cards** to get insights into your spending. We even allow accounts like PayPal and Venmo.

Search by name or Sign-in URL

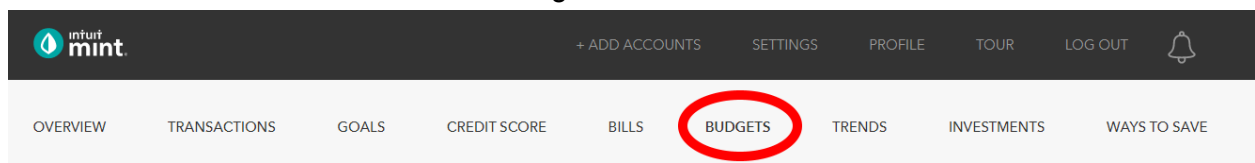
Here's our suggestions for you based on the data you've given us already



Show more

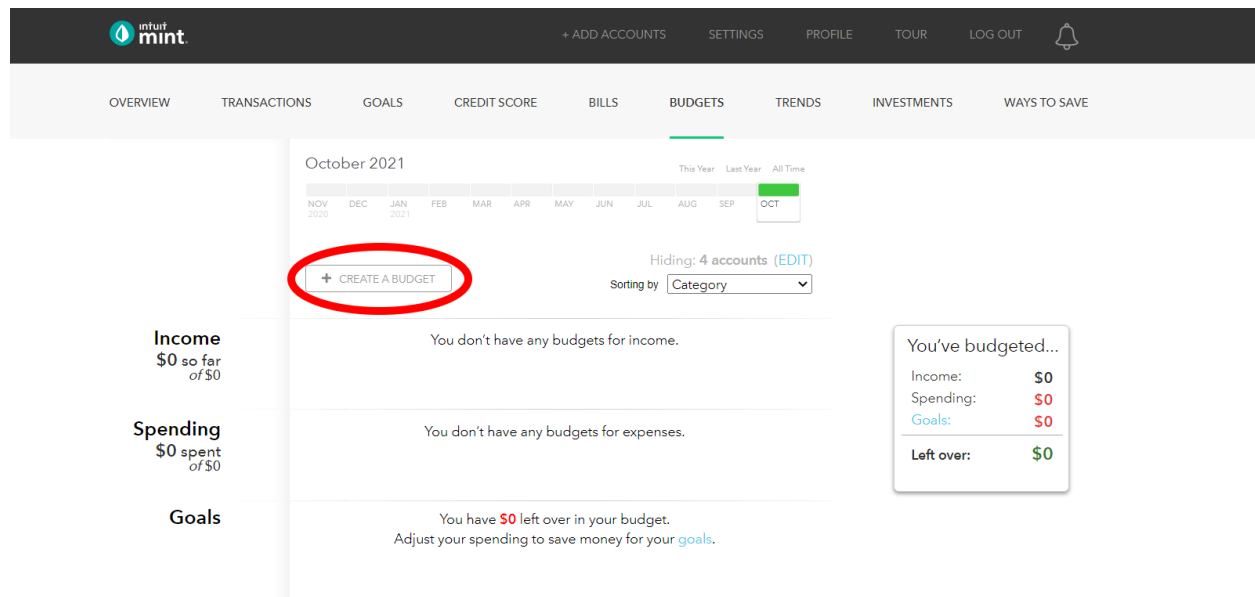
Step 6

Click on the **BUDGETS** tab under the navigation bar



Step 7

Click on the **+ CREATE A BUDGET** button



Note: Mint may automatically create budgets for income & spending based on your accounts provided so edit those if needed

Step 8

Choose your category using the dropdown menu and fill out the information to match your budget and you're done

The 'Create a Budget' form is displayed. It includes a 'Choose a Category' dropdown menu currently set to 'Groceries'. Below this, there's a section 'When will this happen?' with three radio button options: 'Every Month' (which is selected), 'Every Few Months', and 'Once'. There is also a checkbox labeled 'Start each new month with the previous month's leftover amount' which is currently unchecked. An 'Amount' field is set to '\$ 100'. At the bottom, a confirmation message reads: 'We'll set a budget of \$100 each month for Groceries that starts over at the beginning of every month.'

Note: Image above is filled out with information pertaining to a monthly grocery budget of \$100, you should tailor the category and numbers to fit how much money you want to allocate for each category based on your personal income and spending

Troubleshooting/Additional Notes

If necessary, you can edit the budget for each category you create by clicking on the **EDIT DETAILS** button highlighted in the image in order to change the frequency and amount of budget, or delete it. You can not change the category, if you would like to have a different category please refer back to Step 8.

The screenshot displays the Mint budgeting interface for October 2021. The top navigation bar includes a calendar view with months from November 2020 to October 2021, and tabs for 'This Year', 'Last Year', and 'All Time'. Below the calendar, there is a '+ CREATE A BUDGET' button and a 'Hiding: 4 accounts (EDIT)' notification. A 'Sorting by' dropdown menu is set to 'Category'. The main content area is divided into three sections: 'Income', 'Spending', and 'Goals'. The 'Income' section shows '\$0 so far of \$0' and a message 'You don't have any budgets for income.' The 'Spending' section shows '\$0 spent of \$100' and a budget for 'Food & Dining: Groceries' with a limit of '\$100' and a status of 'budgeted'. A red circle highlights the 'EDIT DETAILS' button. The 'Goals' section shows 'You have -\$100 left over in your budget. Adjust your spending to save money for your goals.' A summary box on the right titled 'You've budgeted...' shows 'Income: \$0', 'Spending: -\$100', 'Goals: \$0', and 'Left over: -\$100'.

Category	Budgeted	Spent
Income	\$0	\$0
Spending	-\$100	\$0
Goals	\$0	\$0
Total	-\$100	-\$100

Congratulations! You've now created your first budget, whether it was for groceries, personal spendings or clothes, you now have a way to keep track of your spending for those categories! Mint will automatically classify your spendings into those categories making it simple now to stay on top of your budget. You've made the first big step into managing your finances!