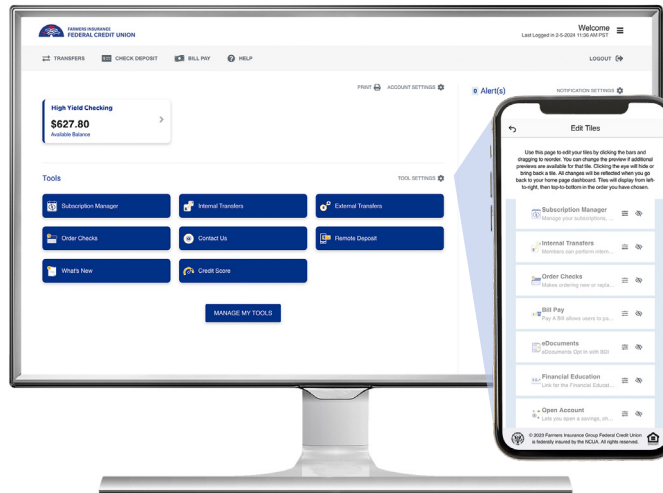




Step 1:

The **Tools** section on the home page lists all the available Tools. Click on **Subscription Manager** to get started.

If the **Subscription Manager** Tool isn't listed, check the **Tool Settings** screen on the **Tulee** Home Screen. On the **Tool Settings** screen, click the grayed-out eyeball to add the **Subscription Manager** to the home screen.

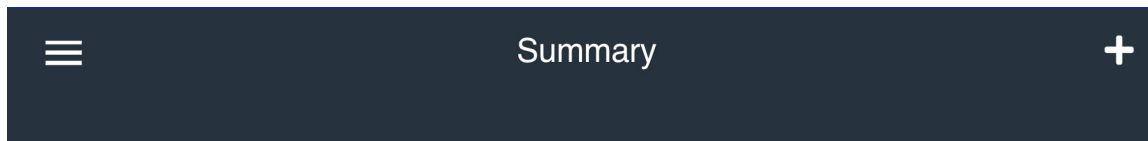


Tool Settings Screen

Step 2:

How To Link External Accounts

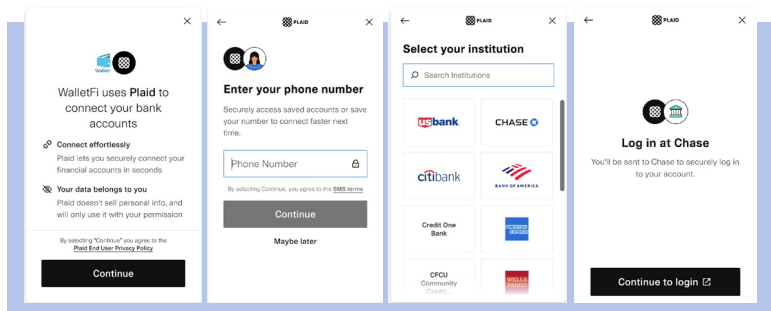
A. Make Subscription Manager your one-stop-shop for managing your **Subscriptions**, **Recurring payments**, and **Card on File** transactions inside and outside the Credit Union. To add external financial institutions, go to the Subscription Manager home screen and click the **+** icon at the top right hand side of the screen.



B. A dialogue box will appear, informing you that you are going to an external site. Click **LET'S GO**.



C. Subscription Manager uses **WalletFi** and **Plaid** to link accounts outside the Credit Union to the Credit Union. Follow the on-screen instructions to find, log in, and link your external financial institution accounts to us.



! Your FIGFCA accounts will be included automatically in Subscription Manager.

Subscription Manager Tool Overview

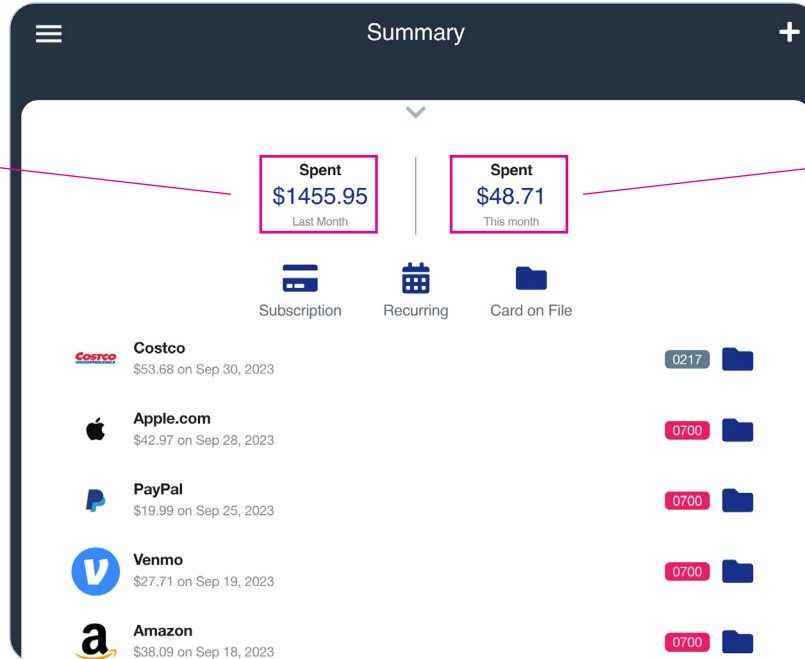
Step 3: View

Subscriptions, Recurring, and Card on File Transactions.

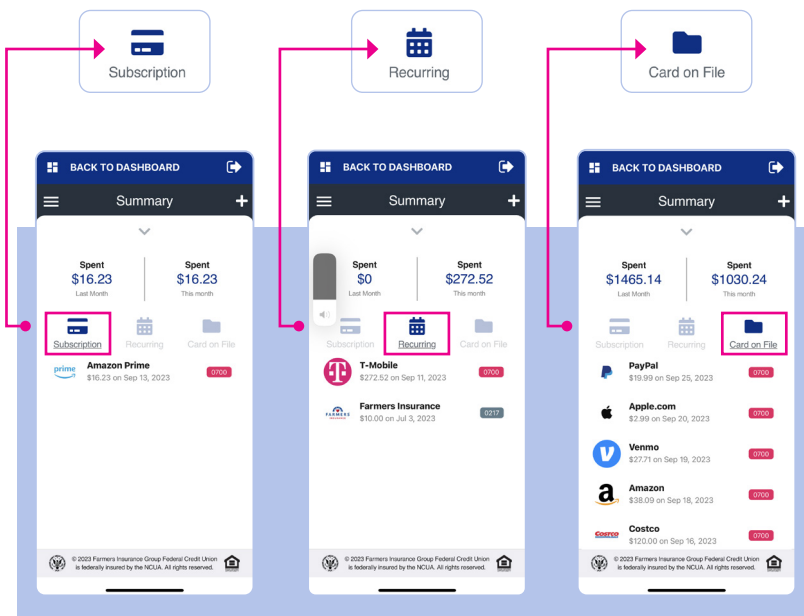
The Summary screen shows all your **Subscriptions**, **Recurring payments**, and **Card on File** transactions. Accounts linked from outside the Credit Union will also appear here.

Main Tool Page

We've included the amount of money you spent last month.



We've also included the amount of money you've spent this month to date.



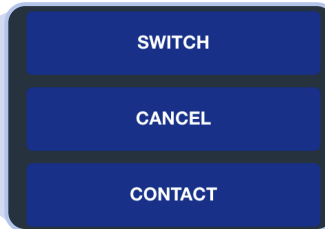
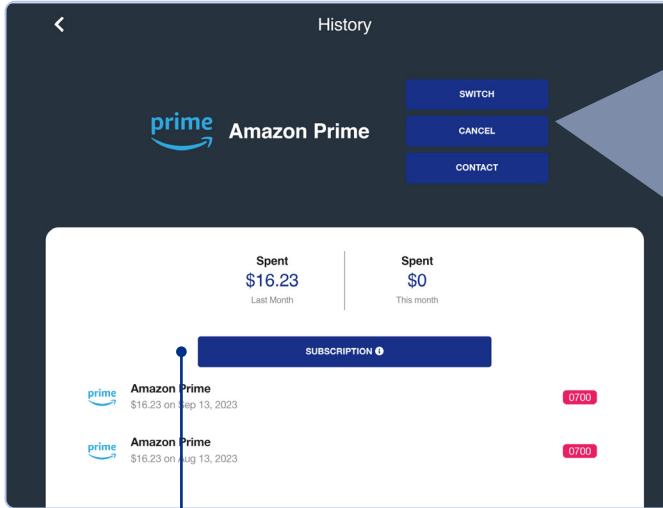
! Click each icon for a list of your spending on Subscriptions, Recurring payments, and Card on File transactions.

Visit page 3 for definitions of each spending category.

Subscription Manager Tool Overview

How To Manage Payments

Start by selecting a company from the list within the **Subscription, Recurring payments,** or **Card on File** transaction categories. You will be taken to the **History** screen for that company, such as *Amazon Prime*.



! Subscription Manager connects you directly to the company you choose, so you can **SWITCH** payment types/account on file, **CANCEL** your subscription, or **CONTACT** the vendor.



Transaction Type Definitions

Click the **i** icon to read the definition of each transaction type.

Transaction Types

- Subscription**
A subscription is an agreement between you and the company for them to automatically bill you on a set time frame, for the same amount, in exchange for the goods or services you receive. Examples include streaming services like Netflix or Hulu, subscription boxes, or software subscriptions.
- Recurring
- Card on File

Transaction Types

- Subscription
- Recurring**
A recurring bill is an expense that occurs on a set schedule, but the amount may vary depending on your usage of the service or other reasons, and the payment dates may vary slightly if you pay manually instead of through auto-billing. Examples include insurance, utilities, or other bills.
- Card on File

Transaction Types

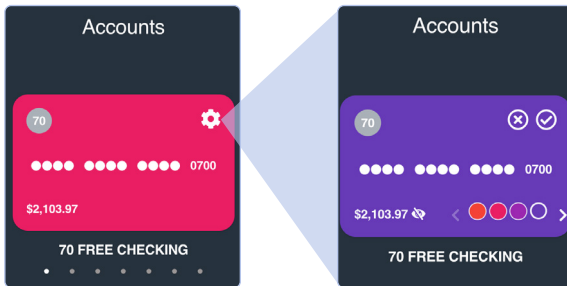
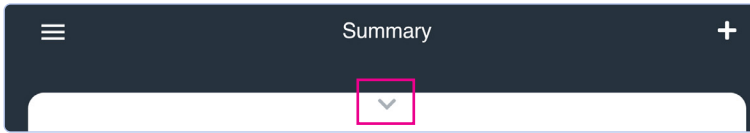
- Subscription
- Recurring
- Card on File**
A card on file is a method of payment that is saved with a company to make purchases easier in the future. Many e-commerce stores, apps, or other merchants may save your card information to make checking out quicker and easier for you. Examples include shopping websites like Amazon or Target, apps like Uber or Airbnb, or payment providers like Venmo or PayPal.

Subscription Manager Tool Overview

Personalizing Account Icons

Payment Options

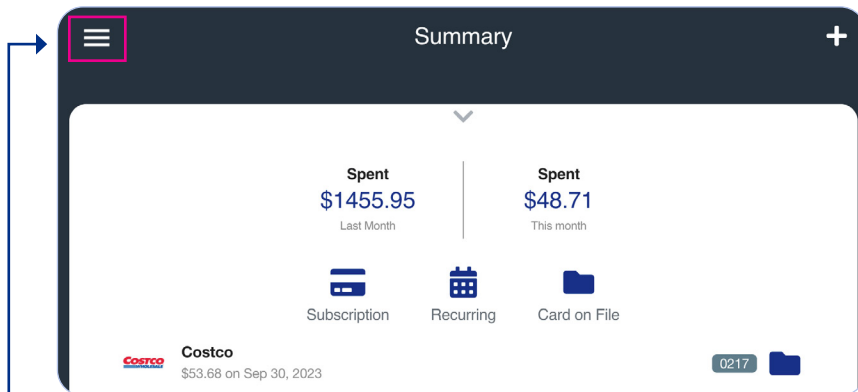
From the Summary home screen, click the down arrow to show all your linked accounts.



! To personalize your accounts by color, click the settings cogwheel. You can change the color of each of your accounts. When done, press the check mark. To exit the color setting option, click the x.

Hamburger Menu

From the Summary home screen, click the hamburger menu in the top left-hand corner to show the three menu options: **Linked Accounts** contains a list of your linked financial institutions/accounts. New subscriptions are in **Notifications**. **Help** links you to the external WalletFi Help Center.



! You cannot review transactions from joint accounts.

