Hurdlr GMTSS Bank Tracking

	Done	Task Number 1 - 3 should Only Need to be done 1 time. After Setup is Complete You can jump right to number 5 in the future. Most transactions will auto remember categories as suggestions in the future as well making this process super quick!
1		1. Set up Hurdlr from unfranchise.com
2		After you are set up from unfranchise.com then you can log in directly from the internet browser.. I prefer Google Chrome.
3		2. Set up your Business GMTSS
4		Click on GEAR Sprocket Icon in the top Right corner for Settings on a Laptop Computer
5		Look under ACCOUNT for BUSINESSES & click that.
6		Click ADD Button
7		Name the Business and select Type and Save. This is a simple process. Just answer questions to create the account.
8		3. Now you are ready to add your bank account(s)
9		Click on GEAR Sprocket Icon in the top Right corner for Settings on a Laptop Computer
10		Click on Banks & Integrations under Income or Expenses
11		Click ADD Income Account or Add Expense Account. This will log you into your bank account and sync it to Hurdlr
12		Make sure to select the account(s) that you want to sync to Hurdlr
13		Income and Expenses will sync into Hurdlr
14		4. Click Home button
15		5. Click Expenses from Top Left Menu
16		Click EACH Individual Expense transaction
17		Choose Business
18		Add a NOTE to the Note Box = This is your description of what the transaction is.
19		Click on Category you want this to go into under the Category Heading. This allows you to select from a Pre-Loaded List of Categories. Then skip to Save Transaction *If you don't see an appropriate category suggestion you can search all categories and explore sub categories. If you still don't see something that fits what you are looking to do you can create another Business Category.
20		*Creating a new Business Category requires going to Settings: Click on GEAR Sprocket Icon in the top Right corner for Settings on a Laptop Computer
21		*Under Expenses Click on Business Categories
22		*View the Comprehensive Already Provided Categories
23		*Click the ADD Button in Orange at the Top

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24	☐	*Name the Category and Select the Parent Category & Expense Account and Save
25	☐	*Now This Expense Category will appear in the future
26	☐	SAVE DETAILS
27	☐	Do this for each Expense Item Listed that has yet to be Noted, categorized and Saved.
28	☐	6. Click Income from Top Left Menu
29	☐	Click EACH Individual Income transaction
30	☐	Choose Business
31	☐	Add a NOTE to the Note Box = This is your description of what the transaction is.
32	☐	Status is Business
33	☐	SAVE
34	☐	7. Click Reports from Top Left Menu
35	☐	8. Click VIEW Expenses by Business
36	☐	Select The Time Frame to which you wish to view and download a report for. It defaults to This Year. You can select many options from the drop down which includes CUSTOM. Custom Allows you to select the start and end date specifically. CLICK APPLY
37	☐	Select the Businesses to which you want to pull the report & Then Click Done
38	☐	View Report after the Screen refreshes to make sure your dates are correct and it shows ALL the EXPENSE Transactions listed on your Bank Statement for the Time Frame You Wish!
39	☐	Once All is Correct you can now CLICK DOWNLOAD
40	☐	A PDF will be downloaded
41	☐	SAVE This to a Folder on your Computer for your GMTSS Bank Info.
42	☐	9. Repeat the steps from number 8 above but Click and VIEW Income by Business
43	☐	Now you are ready to email the 3 Following items: A. Bank Statement(s) (downloaded from your Bank's Online Banking) B. Expense Report that matches the bank statement with detailed Notes(Description for each line item) C. Income Report that matches the bank statement with detailed Notes(Description for each line item) to Each Coordinator Applicable and the GMTSS Department at Market America.