



Compare: FinanceWorks (PFM) vs. Money Management



Feature	FinanceWorks	Money Management
Outside account widget on home page	X	X
Spending widget on home page	X	
Budget widget on home page		X
Aggregate outside accounts	X	X
Quick peek	X	X
Auto categorization success rate	63%	~90%
History	X	X
Split transactions	X	X
Tag transactions		X
Add notes/memos to transactions	X	X
Adding sub-categories	X	X
Flag & view business transactions	X	X
Spending chart	X	X
Budgets	X	X
Goals		X
View trends		X
Debt payoff calculator		X
Net worth	X	X
Email alerts	X	X
Text alerts		X
Mobile		X
Promotions within the product **	X	X
Access to outside account data and transaction data **		X

as of February 9, 2017
 ** Requires the data add-on

Top advantages of Money Management:

- Available on mobile
- Better representation of data to the user (bubble budget, trend chart, debt payoff)
- Better auto-categorization rates so users have to do less work
- Access to outside account and transaction data that can be used to target users with relevant promotions.

For example, search for all users who have aggregated an outside credit card with an interest rate of 5% or higher. Then take those results and have your underwriting department pre-approve them for your credit card. Within Promotion Suite, target those pre-approved users with targeted promotion.