

Money Desktop

Frequently asked questions

Get answers to your most commonly-asked questions about Money Desktop, our financial management tool.

Q: What is Money Desktop?

A: Money Desktop is Northwest's personal financial management tool that allows you to budget and manage your finances by aggregating all your accounts across multiple financial institutions. With Money Desktop, you can see balances and transactions in one place, on any device. You can view your spending and saving trends and have access to budgeting, debt management, net worth, and other personal financial data.

Q: How do I get started with Money Desktop?

A: Log in to your online banking and click 'Link Account' in the navigation bar. Accept the Terms & Conditions, then click **Get Started**. Your Northwest accounts will automatically sync to Money Desktop. To link external accounts, type the name of your institution to search the database, then select the correct option from the list and enter your login credentials.

The screenshot displays the Money Desktop interface. At the top, there is a navigation bar with tabs for Spending, Budget, Trends, Cash Flow, Net Worth, and Debts, and a prominent orange 'Link Account' button. Below the navigation bar, the 'Accounts' section shows two linked accounts: 'Northwest Card' (with an 'External' tag) and 'Affinity Money Market *0333'. The main content area features a 'Welcome to Money Desktop' message with three key benefits: 1) 'See all your accounts, including those with other financial institutions, in one place.' 2) 'Every transaction is automatically categorized so you can spend smarter.' 3) 'Keep your finances on track with a budgeting tool that makes sense and is easy to use.' A blue 'Get Started' button is centered below these benefits, with a note: 'By clicking "Get Started", you agree to our [Terms and Conditions](#).' Below this is the 'Link Account' section, which includes a search box and a grid of 10 financial institutions: Bank of America, Wells Fargo, American Express Credit Card, Citibank, Chase Bank, Capital One, SunTrust, PNC Bank, TD Bank (US), and Key Bank.

Q: How far back will Money Desktop import my data from Northwest and other institutions?

A: Money Desktop will import 90 days of transaction history from Northwest and other institutions.

Q: How far back does Money Desktop save my transaction and budget history?

A: Money Desktop will save your history for as long as you keep your account with Northwest.

Q: How does Money Desktop track my expenses?

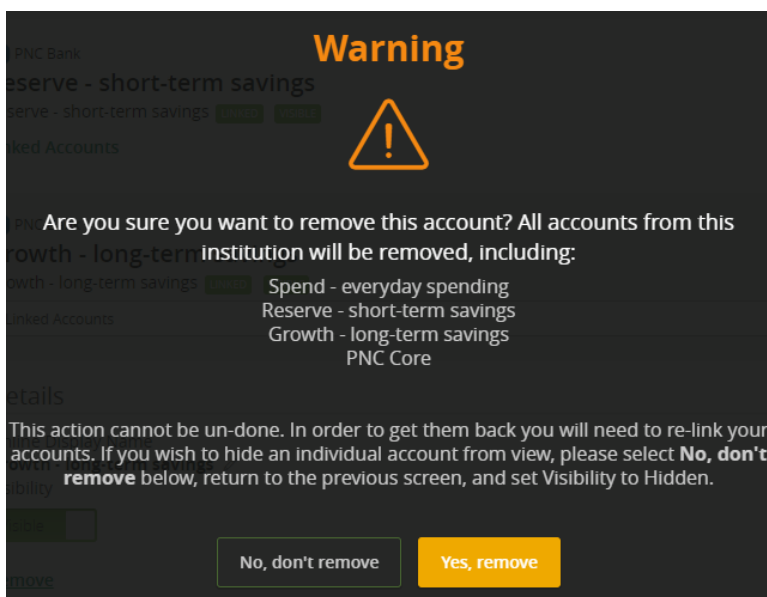
A: Once you've set up all of your accounts, MoneyDesktop automatically categorizes & tracks spending from all your accounts, so you can see where your money is really going. Then you can create relative budgets based off your actual spending, income, debts, and expenses.

Q: How do I edit the Account Name for a linked account?

A: To edit, click **Preferences > Account Preferences > Online Display Name**.

Q: How do I remove an account from a linked financial institution?

A: You cannot remove just **one** account from a linked financial institution (FI) – if you wish to remove a linked FI, **all accounts will be removed**. To remove a linked account, click **Preferences > Account Preferences > Linked Accounts > Remove and confirm**. Please Note - Removing an account also removes all historical balance and transaction data associated with that account. Do not remove an account unless you are sure you are okay with losing all associated data.



Q: I'm having trouble linking my account in Money Desktop.

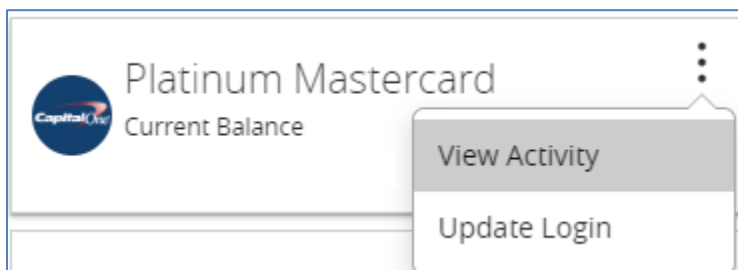
A: Not all types of online banking accounts are compatible. For example, you can only link accounts from domestic, US-based financial institutions. If a specific financial institution does not appear during a search, it may not be currently accessible through our aggregation services.

Q: Can I transact against my linked accounts?

A: No, linked account information is display-only.

Q: If I update my login information for a linked account, how do I update it in Money Desktop?

A: Click the three dots on the account tile to reveal the Quick Actions. Click **Update Login**. When the Update Login window appears, make any necessary changes.



Q: Can I print Money Desktop reports?

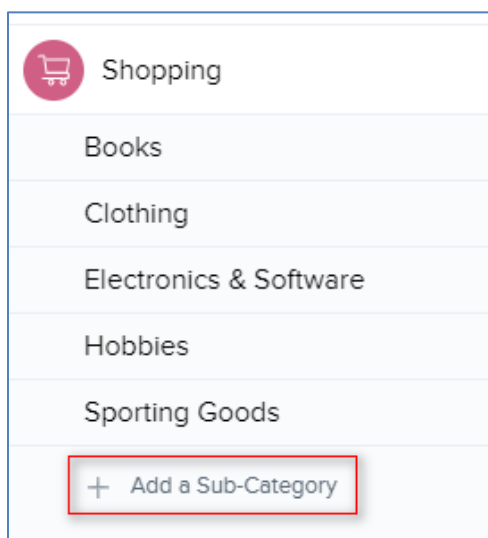
A: Using the printing capabilities built into your browser, you can print Money Desktop charts and graphs.

Q: If I hide a linked account held at another financial institution, will Money Desktop continue to pull transaction data from that account?

A: Yes, as long as at least one other aggregated account for that financial institution is visible. If you hide all accounts for a given aggregated financial institution, all of them will be deleted from your profile and Money Desktop will no longer receive transaction data for those accounts.


Q: Can I change the names of Money Desktop categories?

A: You cannot change the names of or delete the default categories or subcategories. You can add your own subcategories and then rename or delete them as you choose.



Q: How will I know if my login credentials are out of date for a linked account?

A: A **Last Updated** date appears on each linked account tile. If Money Desktop determines the credentials are invalid, a warning icon will appear, along with the length of time since the last successful update. If you click **Account Details** for the account, the system will prompt you to update the credentials for that account.

	Platinum Mastercard	⋮
	Current Balance	\$803.60
	⚠ Updated 8 days ago	



Platinum Mastercard is out of date. [Click here to update your Capital One login credentials.](#)