

Using Junovy Money

Manage your finances through your AI assistant.

- [Getting Started with Junovy Money](#)
- [Transactions & Invoices](#)
- [Budgets & Reports](#)

Getting Started with Junovy Money

Once the Junovy Money connector is installed and you've signed in, you can start managing your finances through your AI assistant.

Your first conversation

Try asking your AI assistant something simple to confirm everything is working:

“Give me a financial overview”

The assistant will call the Junovy Money tools and return a summary of your account balances, recent activity, and key figures. If you see real data from your Junovy Money account, you're all set.

What you can ask

The Junovy Money connector gives your AI assistant access to 23+ tools. You don't need to know the tool names; just ask in plain language. Here are some good starting points:

- **"What's my current balance?"** ; quick snapshot of your financial position
- **"Show my expenses from last week"** ; filter transactions by date
- **"Who are my top customers by revenue?"** ; look up customer data
- **"How much did I spend on office supplies this month?"** ; filter by category

How it works behind the scenes

When you ask a question, your AI assistant picks the right Junovy Money tool, calls it with the appropriate filters, and formats the result for you. For example, asking "What did I spend last month?" triggers the transaction listing tool with a date filter and an expense type filter.

You can be as specific or as vague as you like. The assistant will ask follow-up questions if it needs more detail.

Tips

- Be specific with dates when you can. "Last month" works, but "January 2026" is clearer.
- You can chain requests: "Show my unpaid invoices, then summarise how much is overdue."
- The connector works with whatever currency your Junovy Money account uses.

Next steps

- Record transactions and manage invoices: [Transactions & Invoices](#)
- Work with budgets and reports: [Budgets & Reports](#)

Transactions & Invoices

The Junovy Money connector lets you record transactions, create invoices, and track payments without opening the Junovy Money web app.

Recording transactions

Ask your AI assistant to record income or expenses directly:

“Record a €120 expense for office supplies, paid today”

“I received €2,500 from Acme Corp for the January invoice”

The assistant will confirm the details before saving. You can specify the amount, category, date, description, and whether it's income or an expense.

Listing and filtering transactions

Pull up your transaction history with natural language filters:

“Show my expenses from the last 30 days”

“List all income over €1,000 this quarter”

“What transactions are in the 'Marketing' category?”

Results include the date, description, amount, category, and type (income/expense) for each transaction.

Creating invoices

Generate invoices by describing what you need:

“Create an invoice for €800 to Widget Co for web design services, due in 30 days”

The assistant will create the invoice in Junovy Money with the customer, amount, description, and due date filled in. You can review and send it from the Junovy Money web app, or ask the assistant to send a reminder later.

Tracking invoice status

Check which invoices are paid, pending, or overdue:

“Show my unpaid invoices”

“Which invoices are overdue?”

“What's the total amount outstanding from all customers?”

Managing customers and vendors

Look up or manage your business contacts:

“Show me details for customer Acme Corp”

“List my top 5 vendors by total spend”

“What's the outstanding balance for Widget Co?”

Tips

- When recording a transaction, the assistant will try to match the category automatically. You can always specify one: "Record €50 for lunch, category: meals & entertainment."
- Invoice creation fills in the basics. For complex invoices with multiple line items, it's easier to use the Junovy Money web app.
- You can ask follow-up questions about results: "Now show me just the ones over €500."

Next steps

- Set up budgets and pull reports: [Budgets & Reports](#)

Budgets & Reports

Use the Junovy Money connector to set budgets, track spending, and pull financial reports through your AI assistant.

Working with budgets

Create and monitor budgets using natural language:

“Create a monthly budget of €2,000 for marketing”

“How much of my office supplies budget have I used this month?”

“Am I over budget on any categories?”

The assistant will check your spending against your budget limits and flag anything that needs attention.

Financial reports

Pull summary reports without opening the Junovy Money dashboard:

“Give me a financial overview for January 2026”

“Show my income vs expenses for the last quarter”

“What are my top expense categories this year?”

Reports can cover any time period and can be broken down by category, customer, or vendor.

KPIs and insights

Ask for key performance indicators:

“ "What's my profit margin this month?"

“ "How does this month's revenue compare to last month?"

“ "What's my average invoice value?"

The assistant calculates these from your transaction and invoice data.

Exporting data

While the connector is great for quick lookups and summaries, detailed exports (CSV, PDF) are best done through the Junovy Money web app at <https://money.junovy.com>. You can ask the assistant to point you there:

“ "I need to export my Q1 transactions as a CSV"

Tips

- Budgets are tracked per category. Make sure your transactions are categorised consistently for accurate tracking.
- The assistant can compare time periods: "Compare my January and February expenses."
- For complex financial analysis, consider using the data alongside Junovy Office spreadsheets via the Business Suite connector.

Next steps

- Set up the Business Suite connector: [Files & Folders](#)
- Having issues? See [Troubleshooting & Support](#)