

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](#)
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