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

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