

Getting started with Imago

Everything you need in the first ten minutes — and the two habits that keep your data safe for years.

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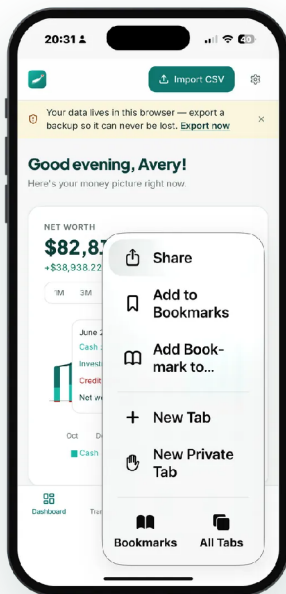
1. Install Imago — do this first

Imago runs in your browser, but it works best installed, with its own icon and window. **Install it before you enter anything** — especially on an iPhone or iPad.

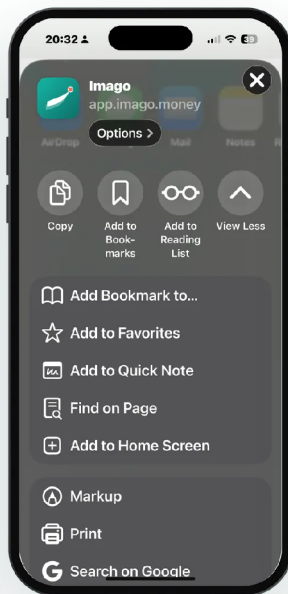
iPhone and iPad: install first, then set up. On Apple devices, the app on your Home Screen keeps its own storage, completely separate from Safari. If you activate your key and add data in a Safari tab and *then* install, the icon opens an empty app — your data is still sitting in Safari. So install first, open Imago from the icon, and do everything from there. (Android and computers don't have this problem, but installing first is still the tidiest start.)

iPhone / iPad (Safari)

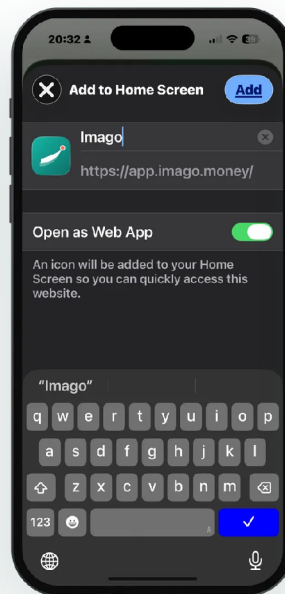
1. Open app.imago.money in **Safari**. If you tapped a link inside Instagram, Pinterest or another app, open it in Safari first — those built-in browsers can't install apps.
2. Tap **Share**. On newer iPhones it's inside the **•••** button at the bottom of the screen.
3. Choose **Add to Home Screen**. If it isn't listed, tap **View More** first.
4. Leave **Open as Web App** switched on, and tap **Add**.
5. **Close Safari and open Imago from your Home Screen**. Everything from here on happens in the installed app.



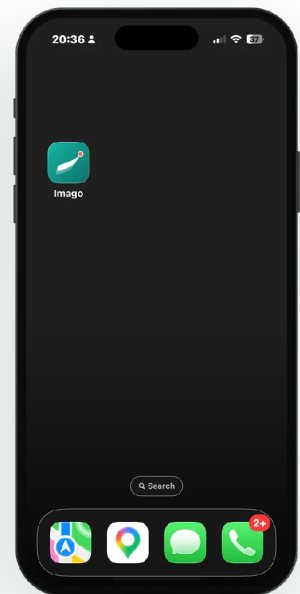
1 Tap **•••**, then **Share**



2 Tap **View More** if needed, then **Add to Home Screen**

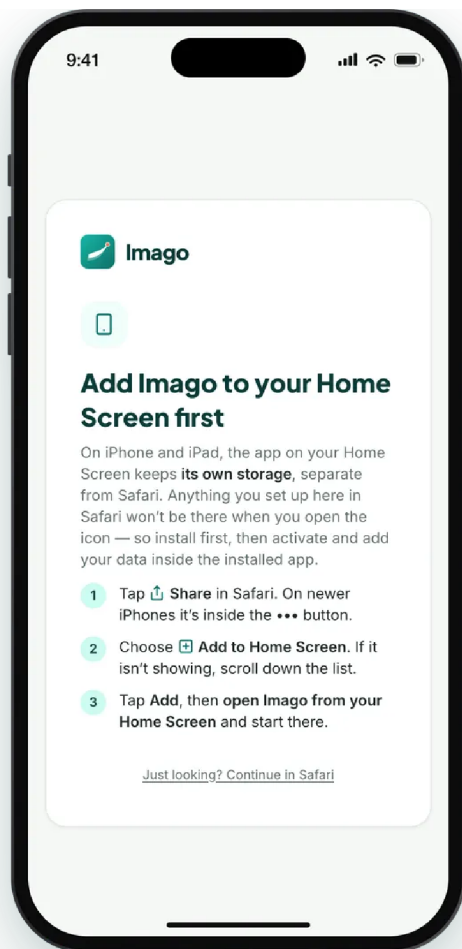


3 Leave **Open as Web App** on, then tap **Add**



4 Open Imago from your Home Screen

You don't have to remember this: opening Imago in Safari on an iPhone shows these steps before anything else.



What you'll see in Safari on an iPhone. Follow the steps, then open the icon.

Mac / Windows / Linux (Chrome or Edge)

Look for the install icon in the address bar — a small monitor with a downward arrow — or open the browser menu and choose **Install page as app**. You'll get a real window and an icon for your Dock or taskbar.

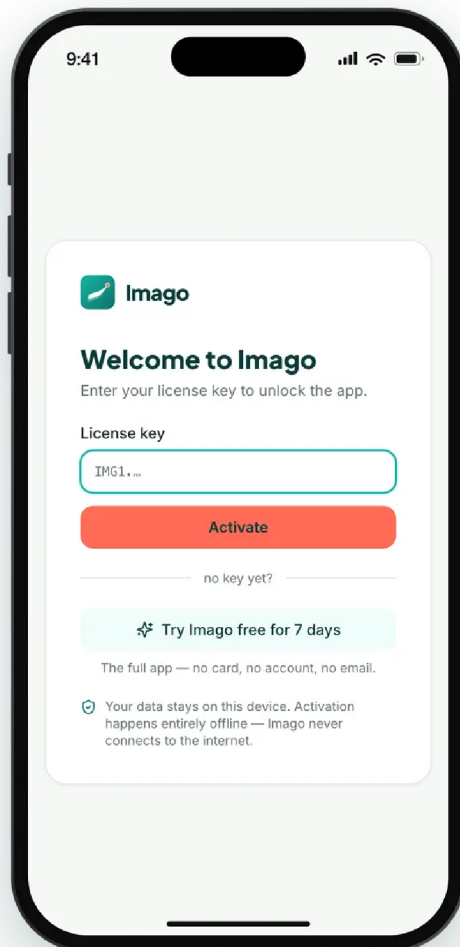
Android (Chrome)

Open the browser menu and tap **Install app**.

Once installed, Imago works with no internet at all — on a plane, in a basement, anywhere. Your data was never coming from the internet in the first place.

2. Activate

Open Imago from the icon you just installed, and paste the license key from your purchase email into the activation box. No key yet? **Try Imago free for 7 days** starts the full app with no card and no account.



Paste your key and tap Activate — or start the free trial.

Activation happens entirely inside the app using cryptography — Imago never contacts a server to check it. That's also why we can't look your key up for you: **keep the email**. It re-activates Imago on any device you own, and on a fresh install if you ever clear your browser.

If you started the free trial in the same app you're activating, everything you entered is still there. Activating just removes the countdown.

3. Bring in your transactions

Imago never asks for your banking password and never connects to your bank. You bring the data in yourself, from a file your bank already offers.

1. Sign in to your online banking and look for **Export, Download transactions**, or **Download CSV**. Choose CSV and a date range. On a phone, save the file to **Files**.
2. In Imago, tap **Import CSV** at the top of the screen.
3. Choose which account the file belongs to. Imago shows you when you last imported into that account and what date range it covered, so you know where to pick up.
4. Pick the file. Tell Imago which columns are the date, description and amount — it remembers your bank's layout, so you only do this once per bank.

Step 1 of 3: choose the account, then
pick your bank's file.

Overlapping date ranges are safe. Imago recognises transactions it has already seen and skips them, so you can re-import a period without creating duplicates.

As you categorize, Imago learns. Rules you create are applied automatically to future imports, and the review queue shrinks every month.

Where your data actually lives

On your device. That's the whole point, and it has one important consequence, so it's worth being precise.

Your accounts, transactions, budgets, rules, goals and settings are stored in your browser's own private storage, on the device you're using, tied to that browser. Nothing is uploaded. There is no Imago server holding a copy — not an encrypted one, not a backup one, none.

The consequence: if you clear your browsing data and choose to include site data, or you lose the device, that information is gone — and we genuinely cannot recover it, because we never had it. This is the trade you made for privacy, and it's a good trade. It just means the next section matters.

Two devices do not share data automatically. Your laptop and your phone each keep their own copy. See [Using Imago on another device](#).

How to back it up (please read)

In Imago, go to **Settings → Data & backup → Export all (JSON)**. You get a single `.json` file containing everything: accounts, transactions, categories, budgets, rules, recurring bills, goals, import history and your settings.

Put that file somewhere you'd put a tax document — your Documents folder, iCloud Drive, Dropbox, Google Drive, a USB stick. Anywhere you like. It's your file.

How often?

After every import session is a good rhythm — you've just done the work, so protect it. Imago will nudge you if it's been a while.

What's *not* in the backup

Your license key is deliberately excluded, along with your activation status. That's so a backup can be restored without disturbing activation, and so sharing a backup never shares your license. Keep your key email separately.

Settings → Data & backup. Export all
is your backup; Restore from file
reads one back.

Restoring

Settings → Data & backup → Restore from file, and pick the file. This replaces everything currently in the app with the contents of the backup, so restore onto a fresh install or when you genuinely want to roll back.

Using Imago on another device

Because data lives per-device, moving to a new laptop or adding your phone is a deliberate, two-step move:

1. On the device that has your data: **Settings → Data & backup → Export all (JSON)**.

2. Get the file to the other device — AirDrop, email it to yourself, or save it to a cloud folder both devices can see.
3. On the new device: [install Imago first](#) and open it from the icon. Paste your license key from the purchase email, then **Settings → Data & backup → Restore from file** and pick the file.

Your license covers every device you own — the same key activates all of them.

Be aware: this is a copy, not a sync. From the moment you restore, the two devices drift apart — a transaction you add on your phone won't appear on your laptop. Most people keep one device as the "real" one and treat the other as a viewer. Proper multi-device sync, encrypted so we still can't read your data, is what we're building next.

Keeping backups in iCloud or Dropbox

Yes, and it's a good idea. Saving your export to iCloud Drive, Dropbox, OneDrive or Google Drive gives you an off-device copy if your laptop is lost or stolen.

And yes — you can restore that same file on either your computer or your phone.

The backup format is identical across every device, so a backup exported from your desktop restores perfectly onto your iPhone, and the reverse works too. On a phone, choose the file from your cloud app when Imago asks for it.

Two things worth understanding about doing this:

- **It doesn't make your devices sync.** A file in Dropbox is a snapshot from the moment you exported it, not a live connection. Restoring on a second device gives you a copy of that moment.
- **Your backup file is not encrypted.** It's plain, readable JSON — deliberately, so you can open it, inspect it, or move it into another tool. That also means anyone who can open the file can read your finances. If your cloud account is protected by a strong password and two-factor authentication, that's reasonable protection. If you'd rather not put unencrypted finances in a cloud account at all, keep the file on an encrypted drive or a USB stick instead.

Updates

Nothing to do. Imago updates itself the next time you open it, and your data and license stay exactly where they are. Updates are included forever — that's part of the one-time purchase.

Getting help

Email support@imago.money and Rachel will answer personally, usually the same day.

Especially worth writing in about: a key that won't activate, a bank CSV that won't map cleanly, or a backup that won't restore. Those are our problems to solve, not yours.

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