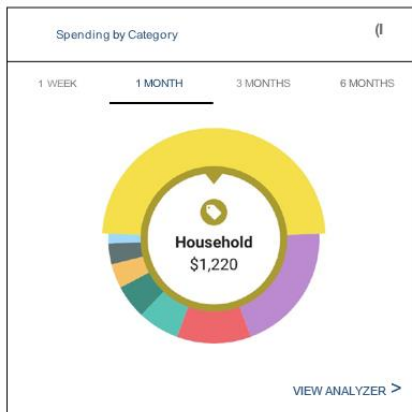




Quick Start Guide



Dashboard

See which spending category you have spent the most in so far this month.

Step 1: Select other parts of the wheel to see other major category spending. Your transactions will categorize themselves with 'tags'.

Step 2: To personalize these categories, or split the transaction between tags, select the transaction and edit the tag.

Step 3: When you select a transaction from the dashboard you can also change the name of the transaction, create a budget, or add a recurring transaction to your Cashflow Calendar.

A screenshot of the 'Spending Targets' setup screen, step 1: 'Choose which tags to track'. It lists various tags with checkboxes and average monthly amounts. On the left: 'Apple Bill' (\$0), 'Auto' (\$0), and a 'SHOW MORE' link. On the right: 'Appliances' (\$0) and 'Auto Expense' (\$0). A 'NEXT' button is at the bottom.

Spending Targets

New users can look at the insights for guidance on what to budget based on spending.

Step 1: Navigate to Budgets and click on "View Budgets."

Step 2: Click "Add Budget."

Step 3: You can choose the name, amount, tags, and accounts associated with this Spending Target.

A screenshot of the 'Cashflow' entry form. It has a close button (X) in the top right. The form includes: 'Bill Name *' with a text input; 'BILL' and 'INCOME' buttons; 'Amount *' with a dollar sign and a text input; 'Frequency *' with a dropdown menu; 'Start On Date' with a calendar icon and the date 'May 16, 2023'; and a 'SAVE' button at the bottom right.

Cashflow

The cashflow calendar brings your budget to life through an interactive calendar.

Step 1: Navigate to Cashflow.

Step 2: Click the plus sign to add a "Bill" or "Income."

Step 3: Enter the required information and select "Save."

Add Save For Goal

Save for a car

Accounts

Completion (Choose One)

☒ Complete By Date
Pick a Date

☐ Monthly Payment
\$

☒ Create an alert for your goal

CANCEL SAVE

Goals

Create savings goals, like saving for a vacation or a debt reduction goal, like paying off a high-rate credit card.

Step 1: Navigate to Goals and select “Add Goal.”

Step 2: Select your desired pay off or savings goal.

Step 3: Fill in the required information.

Step 4: Click “Save” to complete the process of adding a new goal.

Keep in mind, your Goal Summary will update your completion date and the amount needed per month, according to your preferences. Goals will automatically update your progress and will reflect your day-to-day account balances in PFM.

Search for your bank

CHASE

BANK OF AMERICA

WELLS FARGO

citi

usbank

TRUIST

Capital One

AMERICAN EXPRESS

Add an Account

Syncing other accounts for a complete financial picture is simple.

Step 1: Navigate to Accounts and click the plus sign to “Add Linked Account,” or click the three dots in the upper right corner and select “Link Account.”

Step 2: Select an institution or use the search bar to find your institution.

Step 3: Accept the Terms and Conditions by clicking “Next.”

Step 4: Log in to your account

Step 5: Select which account(s) you want to link and click “Submit.”