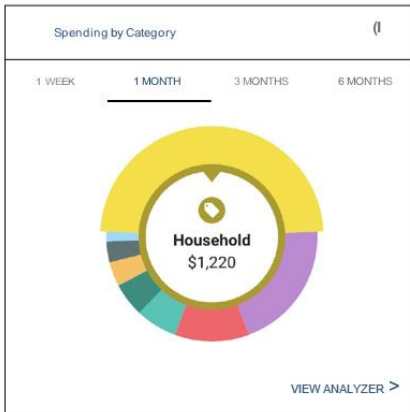


Quick Start Guide



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.

The form is titled 'Choose which tags to track'. It includes a sub-header: 'Select the tags for the transactions you want to track. Below each of the tags is the average monthly. Have tags you don't use anymore? Click here to delete your old tags.' There are four checkboxes with labels: 'Apple Bill', 'Auto', 'Appliances', and 'Auto Expense'. Each checkbox has a '\$0' value below it. A 'SHOW MORE' link is below the first two. A 'NEXT' button is at the bottom. A progress indicator on the left shows four steps: 1. Choose which tags to track (active), 2. Choose the name & amount, 3. Alert Setup, and 4. Choose accounts.

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.

The form is for adding a new entry. It has a close button (X) at the top right. The first field is 'Bill Name *' with a text input. Below it are two buttons: 'BILL' (highlighted in red) and 'INCOME' (highlighted in grey). The next field is 'Amount *' with a '\$' symbol and a text input. Below that is 'Frequency *' with a dropdown menu. The final field is 'Start On Date' with a calendar icon and the date 'May 16, 2023' entered. A 'SAVE' button is 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.

Q 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.”