PFM Quick Start Guide



Dashboard

1. Add accounts from other financial institutions. (Your primary accounts will already be added to this service)



- 2. When you add accounts, your transactions and balances will update accordingly.
- 3. Your transactions will categorize themselves. To personalize these categories, select the transaction and edit the Tag.



Cashflow

- 1. Navigate to the Cashflow tab to see your monthly cashflow.
- 2. Add Incomes & Bills like your paycheck, rent or utilities to accurately forecast your daily cash flow.



Budget

- 1. Navigate to the Budget tab to create Spending Targets and a monthly budget.
- 2. Complete the addition form to see your budget progress for the current month.



Goals

- 1. Follow the last prompt to create financial goals.
- 2. Select and create one of the following goal types to begin tracking your savings progress.



Congratulations!

You've completed the Quick Start Set Up. Continue to explore and monitor your finances!

