

How to Add Income and Bills to the Cashflow Calendar

Step 1: Navigate to *PFM* and select the *View Cashflow* button on your dashboard; or choose the *Cashflow* tab on the toolbar.

The screenshot displays the Geezeo dashboard interface. At the top, a dark blue navigation bar contains several tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. The CASHFLOW tab is highlighted with a blue arrow pointing to it. To the right of the navigation bar are search, notification (12), and share icons. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Cashflow' and shows a calendar view. It displays the 'Current Balance' as \$1,000.00 and a '7 Day Projection' as \$10,150.00. Below this, there are three entries: a 'test bill reminder alert' for -\$100.00 on Nov 2, a 'paycheck' for \$10,000.00 on Nov 3, and another 'test bill reminder alert' for -\$100.00 on Nov 3. A blue arrow points to a 'VIEW CASHFLOW >' button at the bottom of this section. The right column is titled 'Net Worth' and shows data for November 2021. It displays 'Total Net Worth' as \$203,084.33, which is 'Down 84%' last 3 months. Below this, it shows 'Assets' as \$280,078.11 (Down 78% last 3 months) and 'Debts' as \$76,993.78 (Up 79% last 3 months). A 'VIEW NET WORTH >' button is located at the bottom of this section. A banner at the top right of the dashboard features a house icon and the text 'Home ownership can be more than just a dream' with a 'Mortgages >' button.

Step 2: Click the *Plus* icon in the bottom right-hand corner of the screen.

Cashflow Update
Check out the latest changes (more info)

Today < > November 2021 Today's Balance \$900.00

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 test bill reminder alert \$100.00	2 test bill reminder alert \$100.00	3 test bill reminder alert \$100.00 paycheck \$10,000.00	4 test bill reminder alert \$100.00	5 Car, test bill reminder alert \$150.00	6 test bill reminder alert \$100.00
	Daily Balance \$900.00	Daily Balance \$900.00	Daily Balance \$10,800.00	Daily Balance \$10,700.00	Daily Balance \$10,550.00	Daily Balance \$10,450.00
7	8	9	10	11	12	13
test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00 paycheck \$10,000.00	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	test bill reminder alert \$100.00
Daily Balance \$10,350.00	Daily Balance \$10,250.00	Daily Balance \$10,150.00	Daily Balance \$20,050.00	Daily Balance \$19,950.00	Daily Balance \$19,800.00	Daily Balance \$19,700.00
14	15	16	17	18	19	20
test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00 paycheck \$10,000.00	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	test bill reminder alert \$100.00
Daily Balance \$19,600.00	Daily Balance \$19,500.00	Daily Balance \$19,400.00	Daily Balance \$29,300.00	Daily Balance \$29,200.00	Daily Balance \$29,050.00	Daily Balance \$28,950.00
21	22	23	24	25	26	27
Susan Comcast, test bill reminder alert \$400.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00 paycheck	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	gas bill, test bill reminder alert \$200.00

The More You Know: You can manage the accounts shown on your cashflow calendar by selecting the ellipsis button in the upper-right hand corner of the screen and choosing *Configure Accounts*.

Step 3: Click the *Bill* or *Income* tab and complete the following fields.

Cashflow Update
Check out the latest changes (more info)

Today < > November 2021 Today's Balance \$900.00

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 test bill reminder alert \$100.00					6 test bill reminder alert \$100.00
					5 Daily Balance \$10,550.00	Daily Balance \$10,450.00
7 test bill reminder alert \$100.00	8 test bill reminder alert \$100.00				12 test bill reminder alert \$100.00	13 test bill reminder alert \$100.00
Daily Balance \$10,350.00	Daily Balance \$10,250.00				Daily Balance \$9,800.00	Daily Balance \$19,700.00
14 test bill reminder alert \$100.00	15 test bill reminder alert \$100.00	\$100.00	\$100.00	\$100.00	19 test bill reminder alert \$150.00	20 test bill reminder alert \$100.00
Daily Balance \$19,600.00	Daily Balance \$19,500.00	Daily Balance \$19,400.00	Daily Balance \$29,300.00 paycheck \$10,000.00	Daily Balance \$29,200.00	Daily Balance \$29,050.00	Daily Balance \$28,950.00
21 Susan Comcast, test bill reminder alert \$400.00	22 test bill reminder alert \$100.00	23 test bill reminder alert \$100.00	24 test bill reminder alert \$100.00 paycheck	25 test bill reminder alert \$100.00	26 Car, test bill reminder alert \$150.00	27 gas bill, test bill reminder alert \$200.00

Step 4: Click Save.