

How to Add Accounts to be Viewable in PFM

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

The screenshot displays the Geezeo PFM dashboard. At the top, a navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A search icon, a notification bell with '12', and a share icon are on the right. A dropdown menu is open over the 'Accounts' section, listing 'Transaction Search', 'Accounts', 'Link Account', 'Alerts', and 'Help'. A blue arrow points to the 'Accounts' option. Below the navigation bar, the 'Accounts' section shows a table of accounts with their balances and a 'VIEW ACCOUNTS >' button. The 'Transactions' section shows a list of transactions with categories like 'Diningout', 'Utilities', and 'personal', and a 'VIEW TRANSACTIONS >' button. At the bottom, the 'Goals Progress' section shows two goals: 'Custom savings goal' (0% complete, Saved \$16 of \$500,000) and 'Pay off a credit card' (0% complete, Paid \$0 of \$16,785).

Account Name	Balance
American	\$16,784.98
Car Loan	\$21,982.78
401(k) Fidelity	\$89,078.11
Primary Savings	\$1,000.00

Transaction	Category	Amount
Starbucks	Diningout	-\$6.83
Vonage	Utilities	-\$10.95
Check #125	personal	-\$200.00

Goal Name	Progress
Custom savings goal	0% complete Saved \$16 of \$500,000
Pay off a credit card	0% complete Paid \$0 of \$16,785

Step 2: Click the *Edit* pen/pencil button next to the account you are wanting to work with.

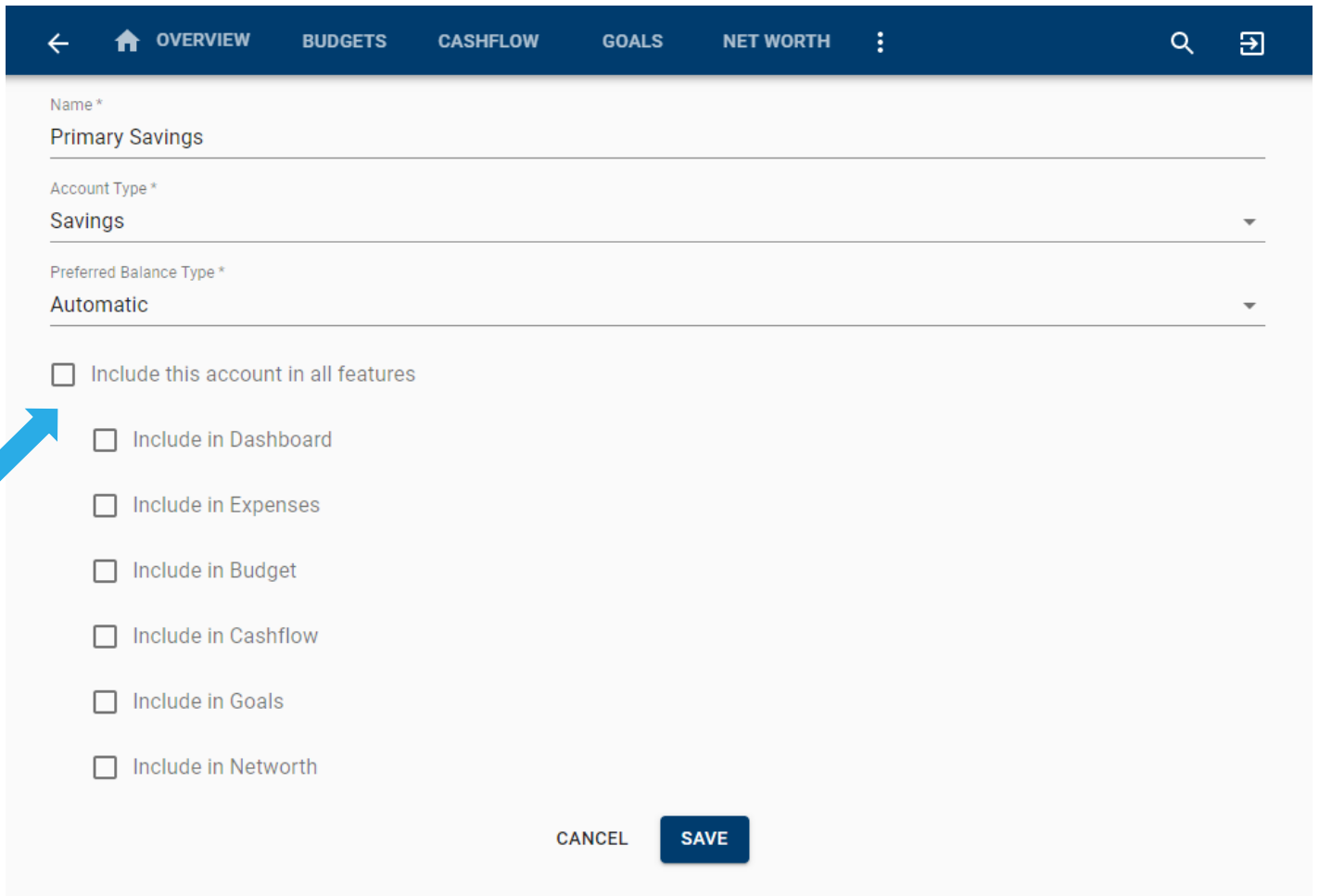
The screenshot shows a financial dashboard with a dark blue header containing navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. Below the header, there are two tabs: ACTIVE and INACTIVE. The main content area displays a list of financial categories and their balances:

Category	Balance
Cash	\$1,000.00
Primary Savings	\$1,000.00
Credit Cards	\$16,784.98
American Card	\$16,784.98
Debts	\$21,982.78
Car Loan	\$21,982.78
Investments	\$89,078.11
401(k) Fidelity	\$89,078.11

A blue arrow points to the edit icon (pen/pencil) next to the 'Primary Savings' account name. A 'Mortgages' button is visible in the banner image. A plus sign icon is located in the bottom right corner of the dashboard area.

The More You Know: Our *PFM* feature allows you to aggregate in external accounts from outside of our Financial Institution in order to provide you with a full financial picture. Navigate to the *External Accounts* tab or choose the *Plus* icon in the bottom right of the above screen to begin linking.

Step 3: Complete the following fields – use the checkboxes to choose which PFM features to include this account in.



The screenshot shows a mobile application interface with a dark blue navigation bar at the top. The navigation bar contains a back arrow, a home icon, and menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. On the right side of the navigation bar are a search icon and a share icon. Below the navigation bar is a form for configuring an account. The form has three input fields: 'Name *' with the value 'Primary Savings', 'Account Type *' with a dropdown menu showing 'Savings', and 'Preferred Balance Type *' with a dropdown menu showing 'Automatic'. Below these fields is a list of seven checkboxes, each with a label: 'Include this account in all features', 'Include in Dashboard', 'Include in Expenses', 'Include in Budget', 'Include in Cashflow', 'Include in Goals', and 'Include in Network'. A blue arrow points to the first checkbox. At the bottom right of the form are two buttons: 'CANCEL' and 'SAVE'.

Name *
Primary Savings

Account Type *
Savings

Preferred Balance Type *
Automatic

Include this account in all features

Include in Dashboard

Include in Expenses

Include in Budget

Include in Cashflow

Include in Goals

Include in Network

CANCEL SAVE

Step 4: Click Save.