



Mobile Manual

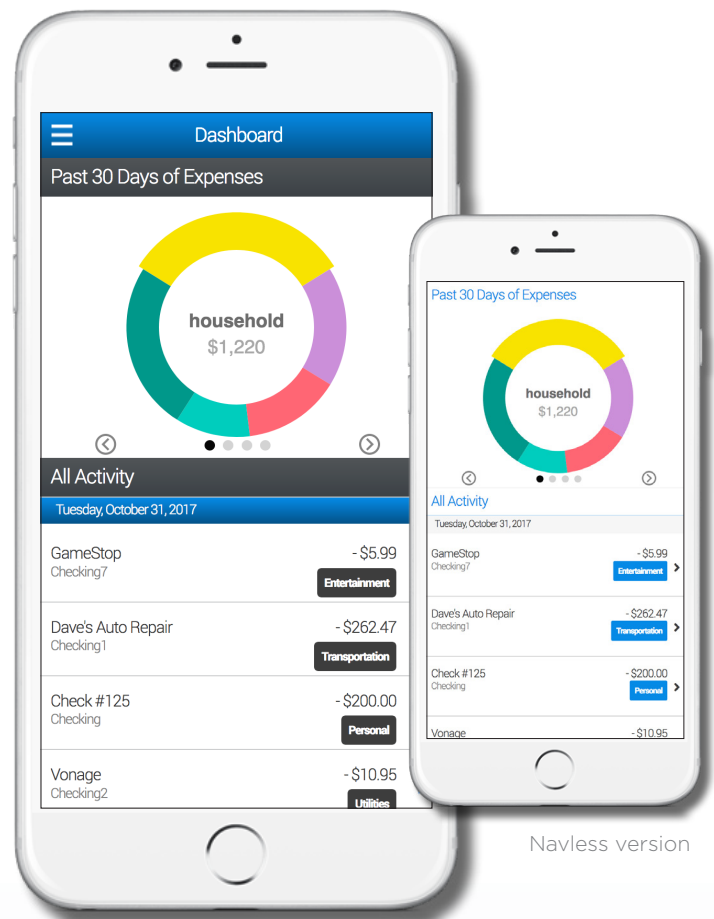
Dashboard

At the top of the Dashboard you can swipe through the available widgets. Your expense widget appears first. Swipe from right to left to navigate to the budget widget, cash-flow and net worth widgets.

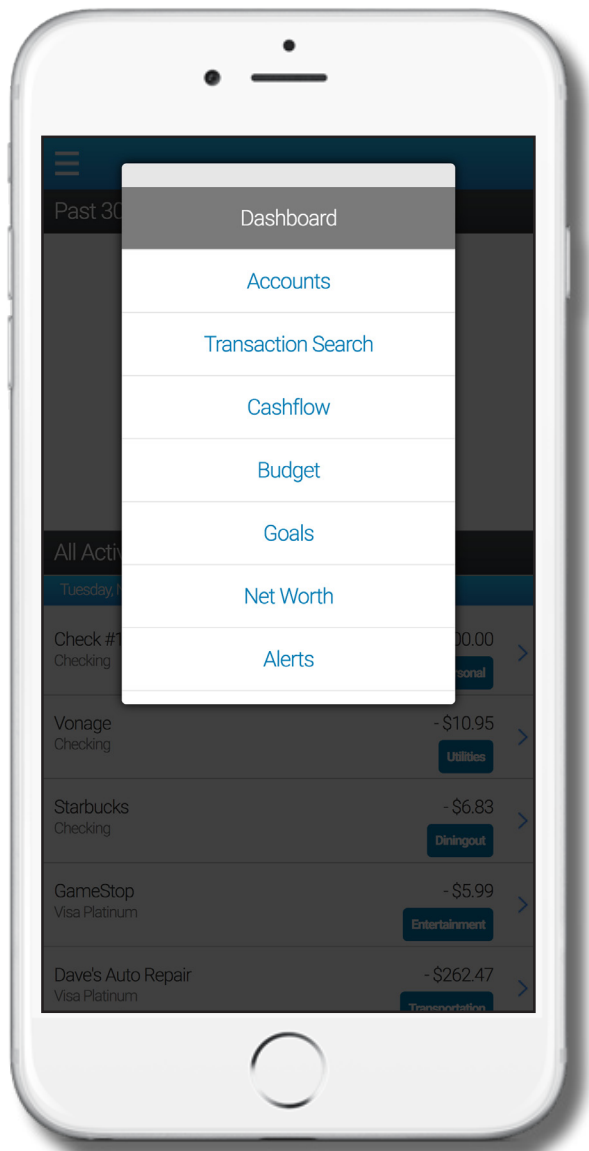
By scrolling down, you can view your most recent transactions and create or edit tags.

To edit a transaction, select the transaction on the screen. In the transaction detail you can change the transaction name, edit the tag, create a budget using the tag or add the transaction as a bill to your cash flow calendar.

Once you have made all changes, click the green save button to navigate back to the Dashboard.

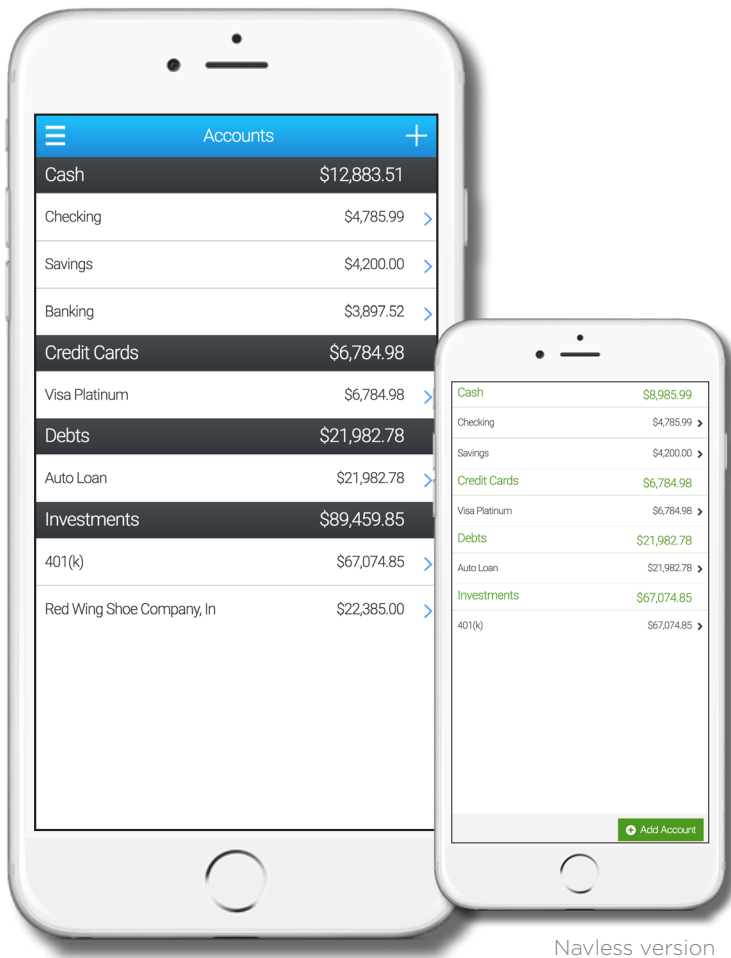


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Navigation

To navigate between features within PFM, select the menu button located at the top right of the screen next to the product name. This will open the selection of features and options from the left side.



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Accounts

To view all accounts connected to your PFM, choose “Accounts” in the navigation menu.

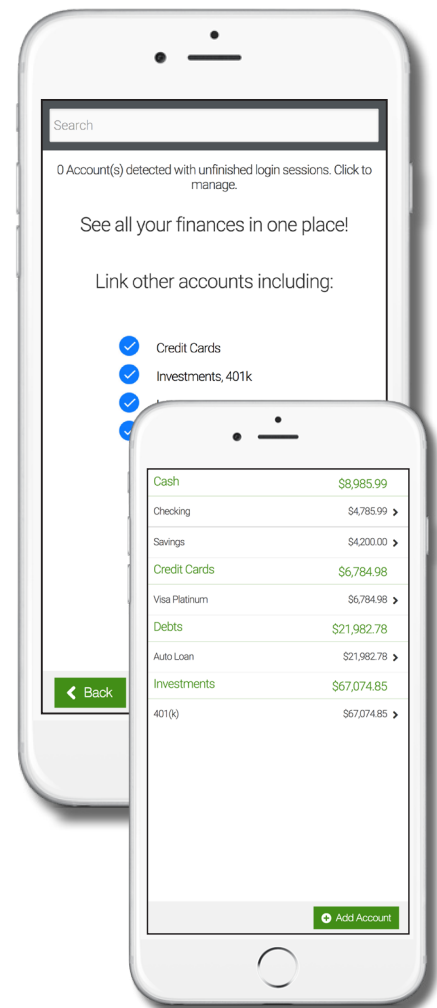
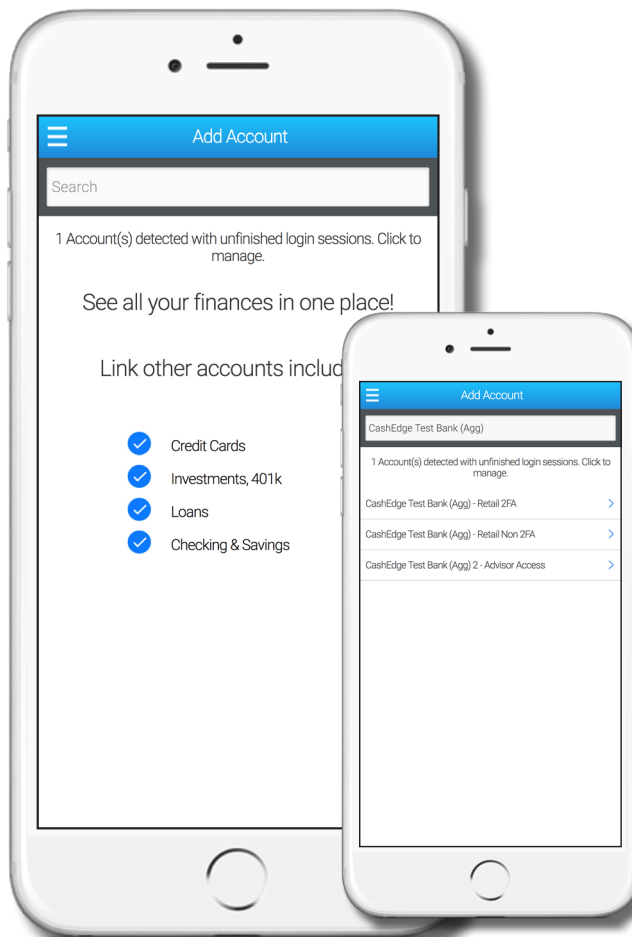
To view specific account details, select the account out of the list. Here you can see a list of recent transactions associated with the select account.

Add Accounts

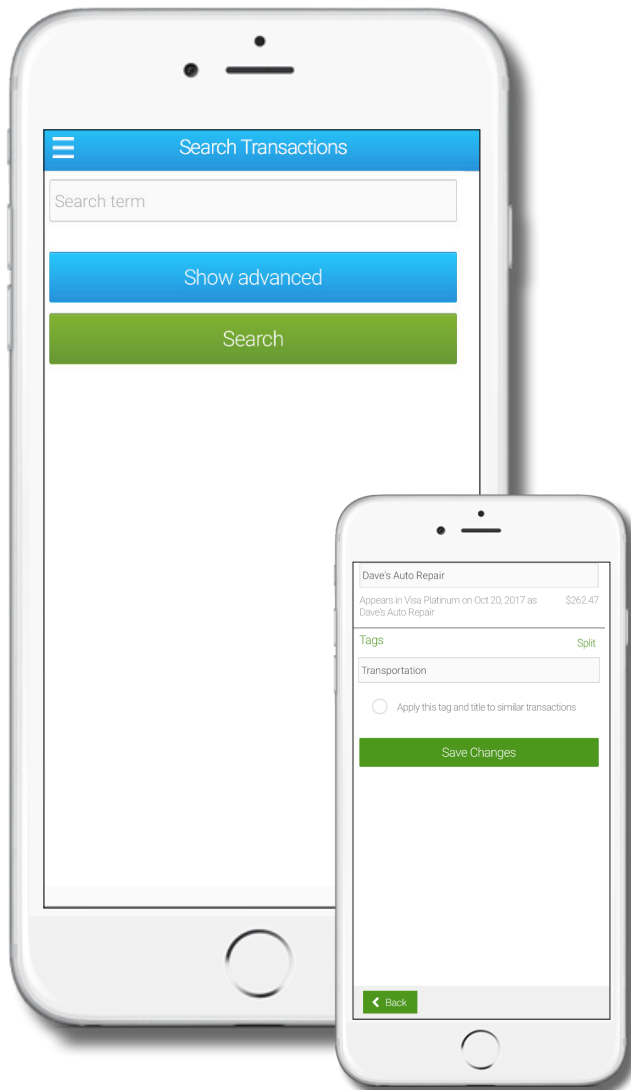
To add a new account to your PFM, select “Add Account” out of the menu.

Using the search bar, enter in the desired financial institution and select it from the list.

Enter in the desired information and connect the account to PFM.



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Transaction Search

To search through your transactions, select “Transaction Search” from the menu.

Type in the transaction you wish to search or show advanced searching options to search by tag or transaction amount.

Once you declare your criteria, select the “Search” button at the bottom of the page.



Cash Flow

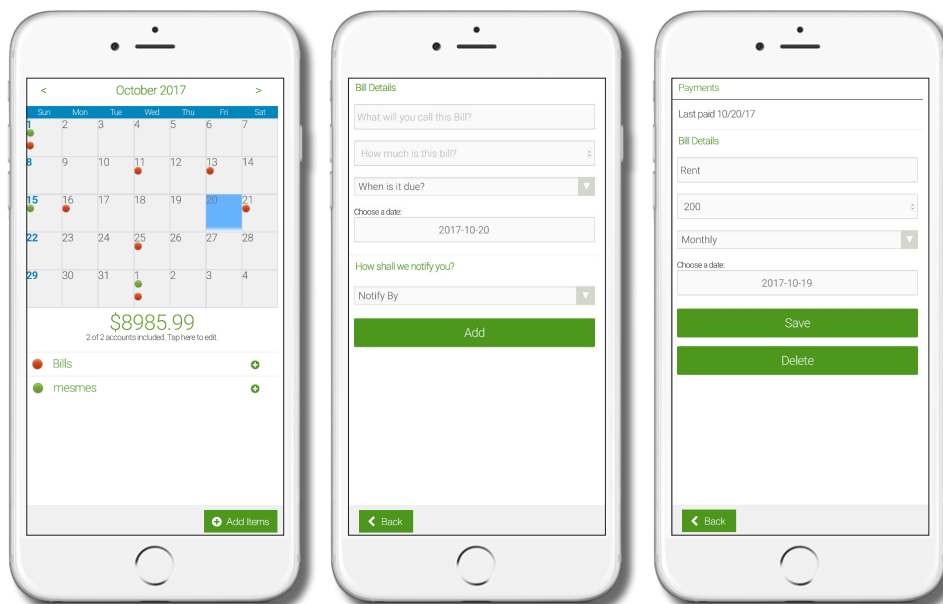
Select “Cash Flow” from the navigation options to view your cash flow calendar.

The calendar will show at the top of the screen. Any day with an associated bill or income will show with a green circle for income and a red circle for a bill. To view a specific day’s events, select the date on the calendar.

The projected cash flow for that day will be shown below the calendar.

Each bill or income scheduled for the day will appear at the bottom on the screen.

To add a new bill or income, select the “+” symbol next to “Bills” or “Incomes” at the bottom on the screen or the “+” symbol located in the top right.



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Budget

To view your existing budgets and current progress select “Budget” out of the navigation.

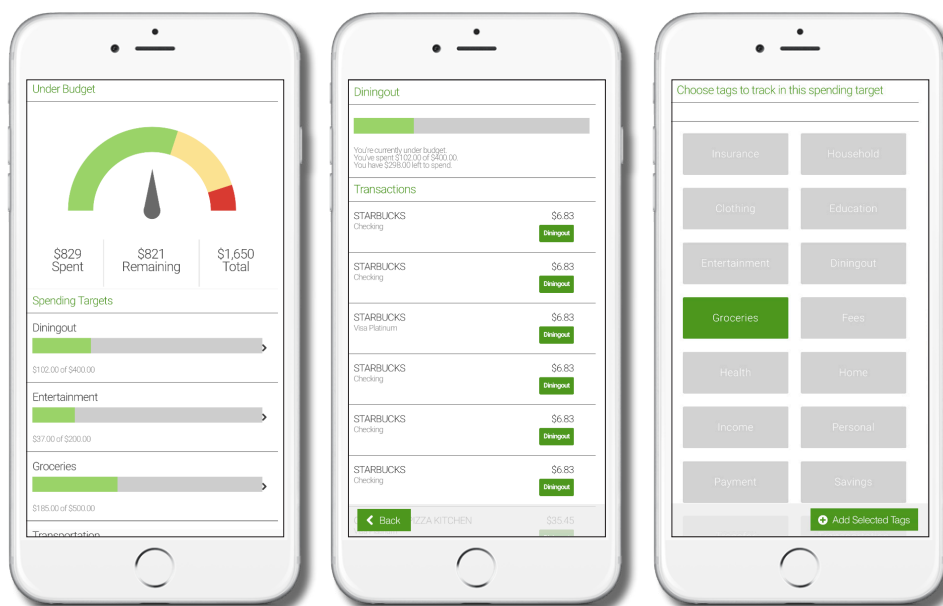
The meter will show current overall budgeting progress for the current month.

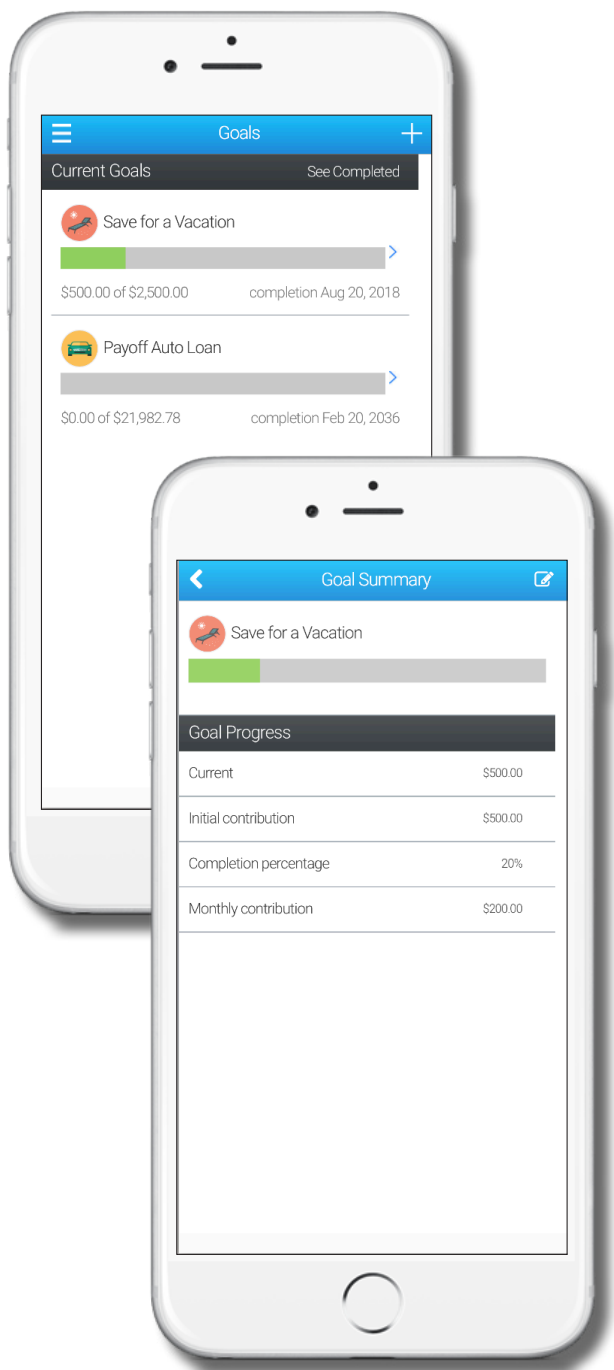
To view specific budgets scroll down and view progress.

To view budget specifics, edit or delete a budget, select the desired budget out of the list.

To create a new budget, scroll down and select the green “Add a Spending Target” option.

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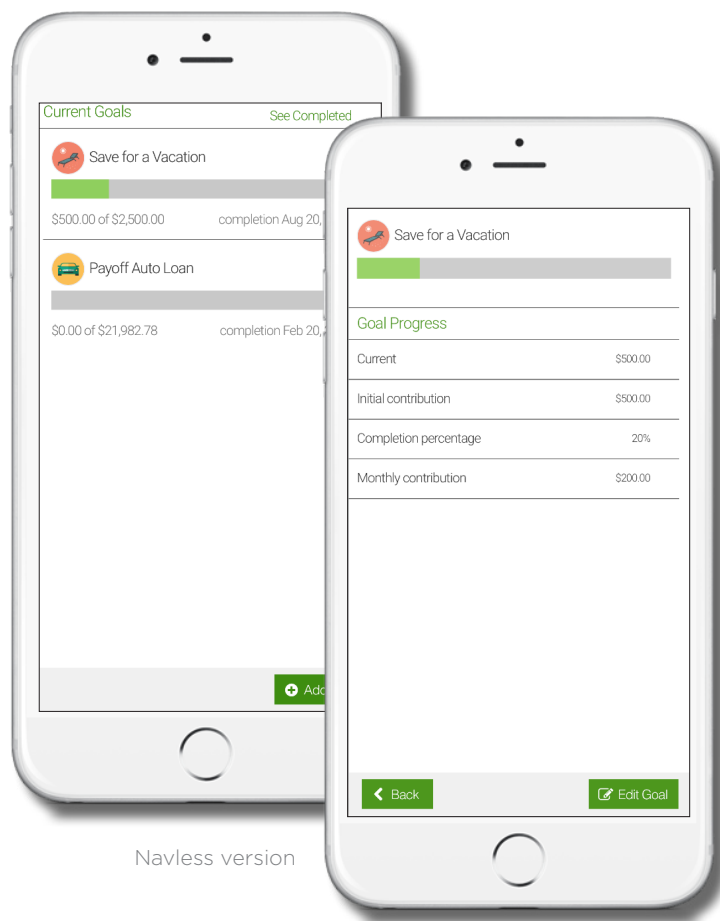


Goals

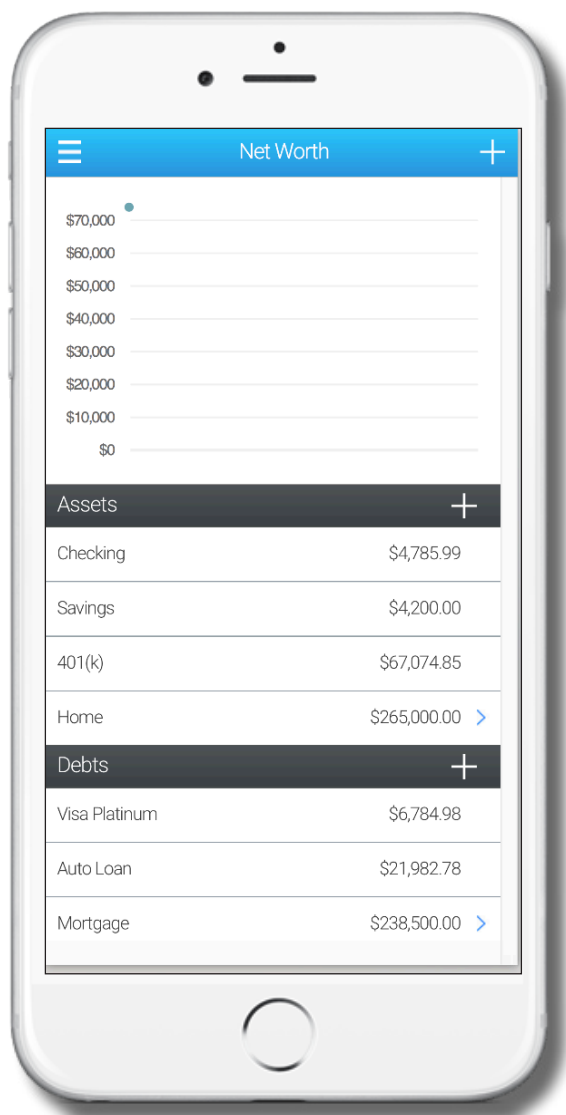
To view progress on current financial goals, select “Goals” out of the navigation options.

To view completed goals select “See Completed” in the right corner of the application.

To add a new goal, select the “+” symbol at the top of the screen next to the “Goals” title.



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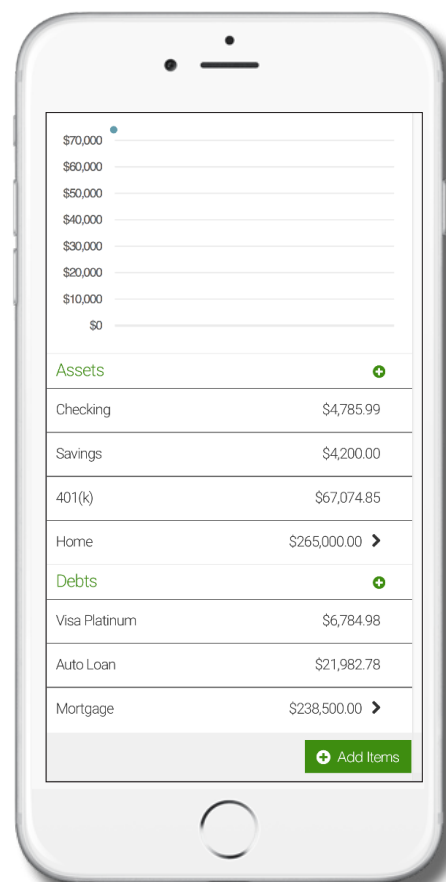
Net Worth

To view your current Net Worth, select “Net Worth” out of the menu.

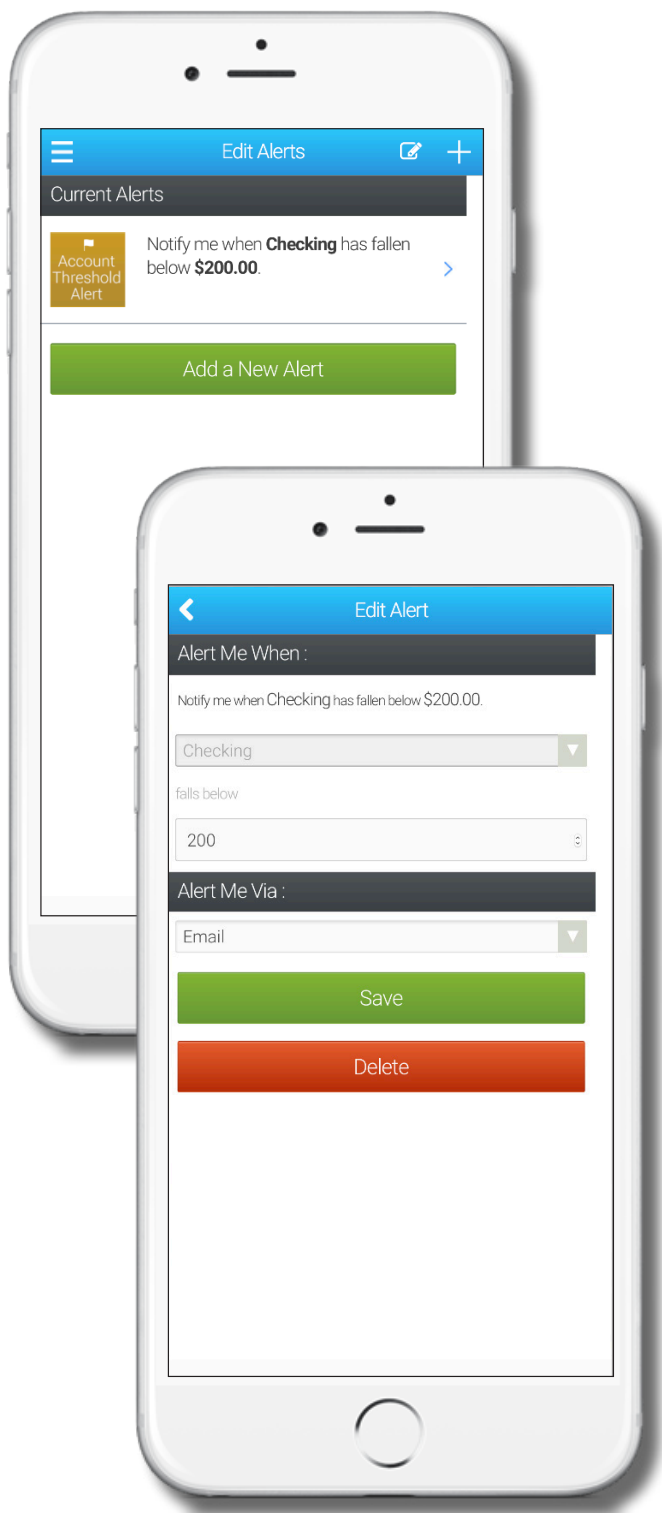
The graph shows changes in your net worth over a period of time.

To view all associated assets and debt, scroll down.

You may add a new asset or debt by choosing the “+” symbol next to “Assets” or the “+” symbol next to “Debts.”



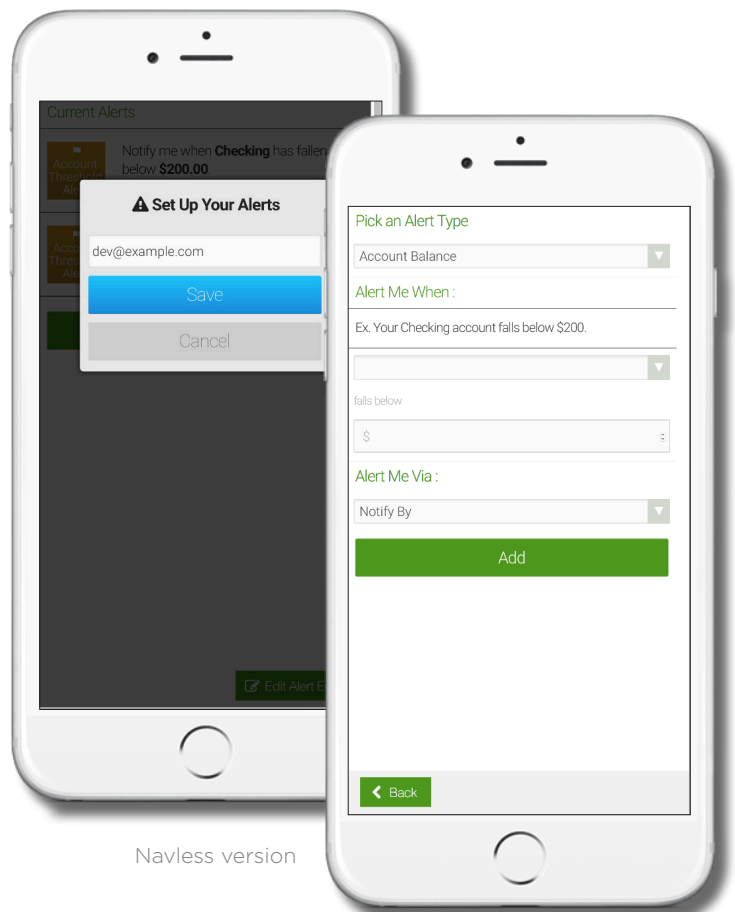
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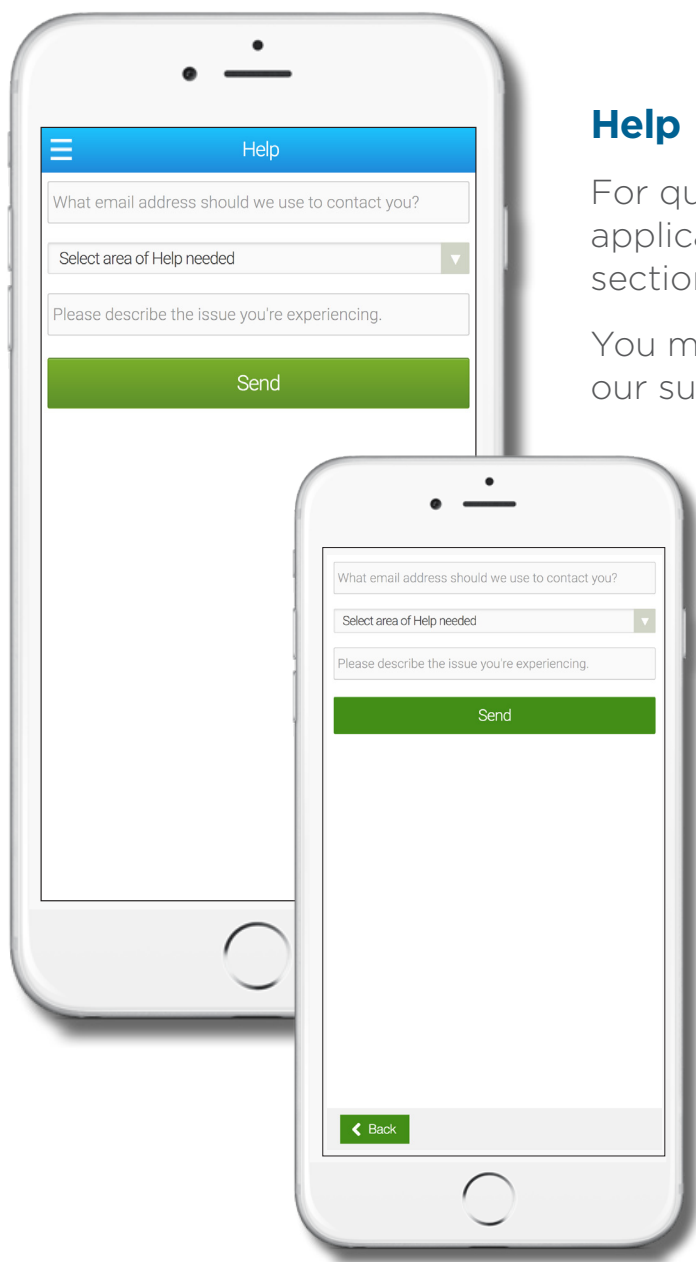
Alerts

To view current alerts, select “Alerts” out of the navigation. To edit or change a current alert, select the alert out of the list.

To create a new alert, select the green “Add a New Alert” button.



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Help

For questions while using the mobile application, navigate to the “Help” section.

You may use the shown form to contact our support team.

If you need assistance, please contact
a member of Client Success team,
clientsuccess@geezeo.com