

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 dashboard interface. At the top, a navigation bar includes tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon, a notification bell with '12' alerts, and a share icon are on the right. The main content area is divided into two columns. The left column, titled 'Accounts', shows a list of accounts under 'Most Recent Activity': American (\$16,784.98), Car Loan (\$21,982.78), 401(k) Fidelity (\$89,078.11), and Primary Savings (\$1,000.00). A blue arrow points to the 'VIEW ACCOUNTS >' button at the bottom of this list. The right column, titled 'Transactions', shows a list of transactions under 'Most Recent A': Starbucks Diningout (-\$6.83), Vonage Utilities (-\$10.95), and Check #125 personal (-\$200.00). A blue arrow points to the 'Accounts' option in a dropdown menu that is open over the top right of the dashboard. The dropdown menu also includes 'Transaction Search', 'Link Account', 'Alerts', and 'Help'. Below the accounts and transactions sections is a 'Goals Progress' section with 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).

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 plus sign icon is visible in the bottom right corner of the dashboard.

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.

← **OVERVIEW** BUDGETS CASHFLOW GOALS NET WORTH

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.