

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 tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A blue arrow points to the CASHFLOW tab. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Cashflow' and shows a 'Current Balance' of \$1,000.00 and a '7 Day Projection' of \$10,150.00. It lists three transactions: a bill for -\$100.00 on Nov 2, an income of \$10,000.00 on Nov 3, and another bill for -\$100.00 on Nov 3. A blue arrow points to the 'VIEW CASHFLOW >' button at the bottom of this section. The right column is titled 'Net Worth' and shows data for November 2021. It displays a 'Total Net Worth' of \$203,084.33, which is 'Down 84% last 3 months'. Below this, it shows 'Assets' at \$280,078.11 (Down 78% last 3 months) and 'Debts' at \$76,993.78 (Up 79% last 3 months). A 'VIEW NET WORTH >' button is located at the bottom of the Net Worth section.

Category	Amount	Change (Last 3 Months)
Current Balance	\$1,000.00	-
7 Day Projection	\$10,150.00	-
test bill reminder alert (Bill)	-\$100.00	-
paycheck (Income)	\$10,000.00	-
test bill reminder alert (Bill)	-\$100.00	-
Total Net Worth	\$203,084.33	Down 84%
Assets	\$280,078.11	Down 78%
Debts	\$76,993.78	Up 79%

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

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.

The screenshot shows a financial dashboard with a dark blue header containing navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon and a share icon are on the right. Below the header, there's a 'Cashflow Update' notification. The main area displays a calendar for November 2021 with a grid of dates and transactions. A modal window is open in the center, titled 'Income Name *' with the value 'Stimulus Check'. It has two tabs: 'BILL' and 'INCOME', with 'INCOME' selected. The 'Amount *' field is set to '\$ 1,500.00'. The 'Frequency *' dropdown is set to 'Once'. The 'Start On Date' is 'Nov 1, 2021'. A 'SAVE' button is at the bottom right of the modal. The background calendar shows various transactions, including 'test bill reminder alert' for \$100.00 and a 'paycheck' for \$10,000.00.

Step 4: Click Save.