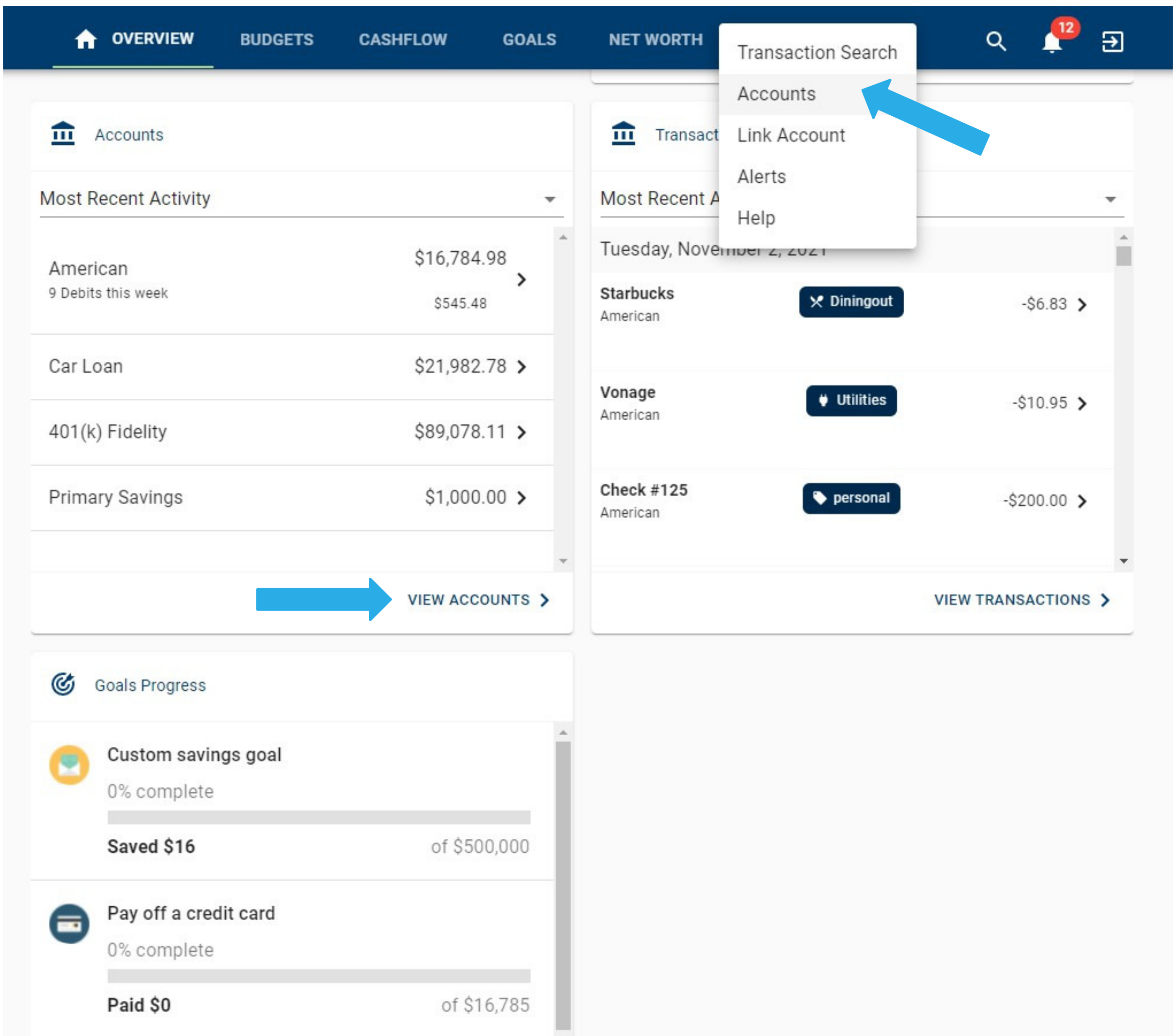
Insights

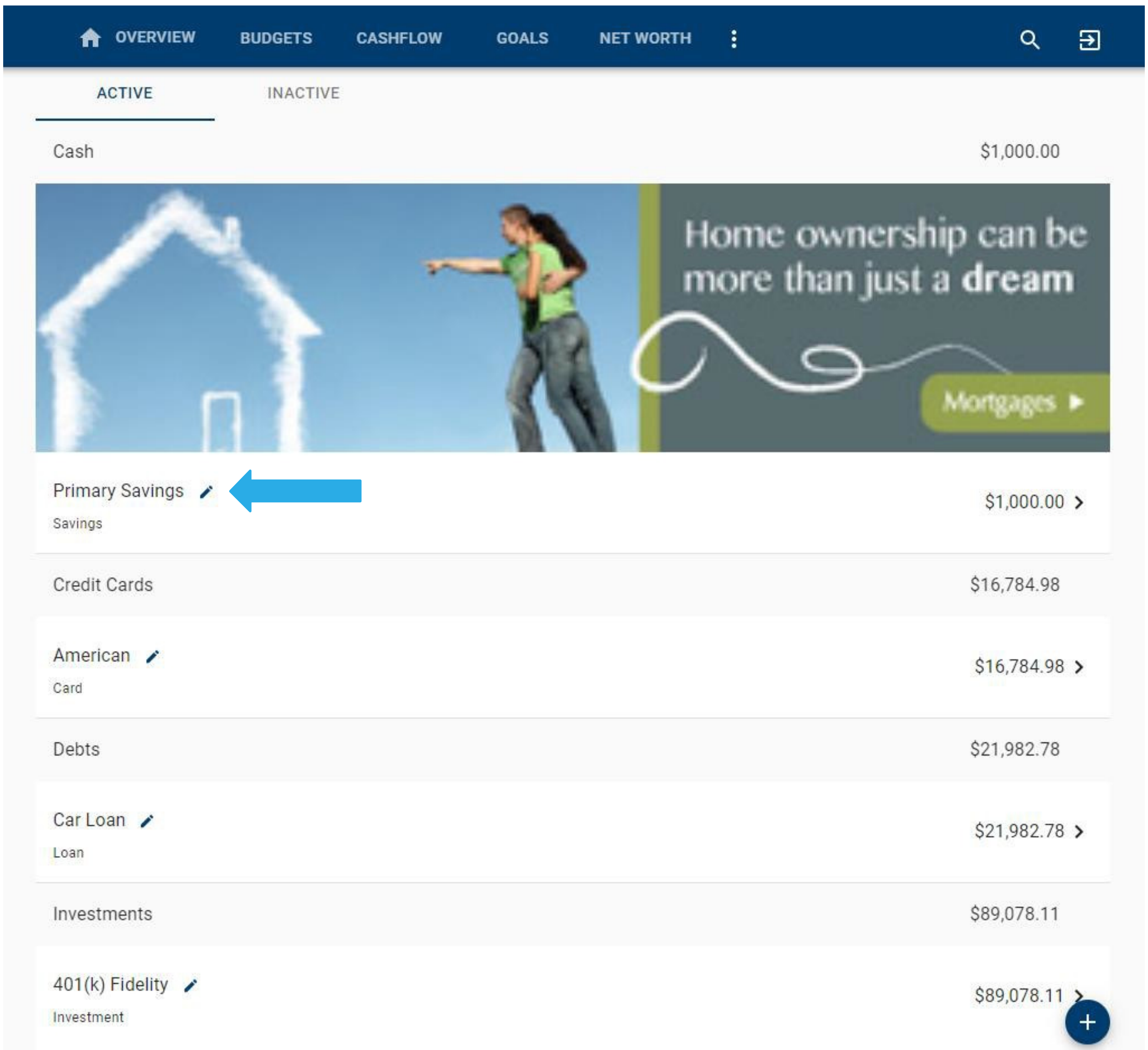
How to Add Accounts to be Viewable in PFM

Step 1: Navigate to *Insights* and select any subcategory on your dashboard; then choose the ellipsis on the toolbar to select *Accounts*.



Insights

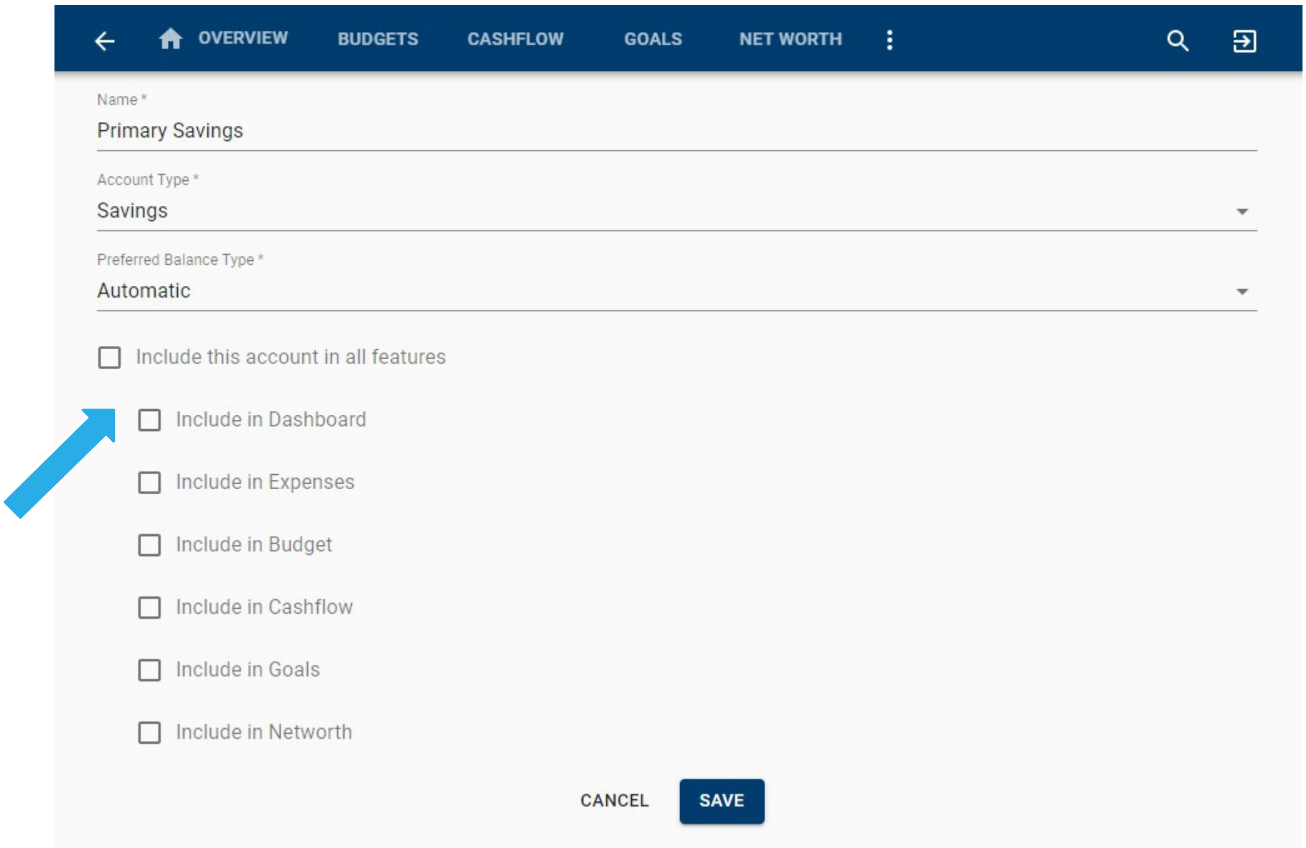
Step 2: Click the *Edit* pen/pencil button next to the account you are wanting to work with.



The More You Know: Our *Insights* feature allows you to aggregate in external accounts from outside of our Financial Institution 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.

Insights

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



Step 4: Click Save.