

# 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*.

The screenshot displays the PFM dashboard interface. At the top, a dark blue navigation bar contains the following menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. On the right side of this bar are icons for search, notifications (with a red '12' badge), and a refresh icon. Below the navigation bar, the main content area is divided into several sections. The top-left section is titled 'Accounts' and shows a list of 'Most Recent Activity' with columns for account name, balance, and a chevron icon. The accounts listed are 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 >' link at the bottom of this section. The top-right section is titled 'Transactions' and shows a list of 'Most Recent A' transactions. The transactions listed are Starbucks American (-\$6.83), Vonage American (-\$10.95), and Check #125 American (-\$200.00). A blue arrow points to the 'Accounts' option in a dropdown menu that is open over the top-right section. The bottom-left section is titled 'Goals Progress' and shows two progress bars: 'Custom savings goal' (0% complete, Saved \$16 of \$500,000) and 'Pay off a credit card' (0% complete, Paid \$0 of \$16,785).

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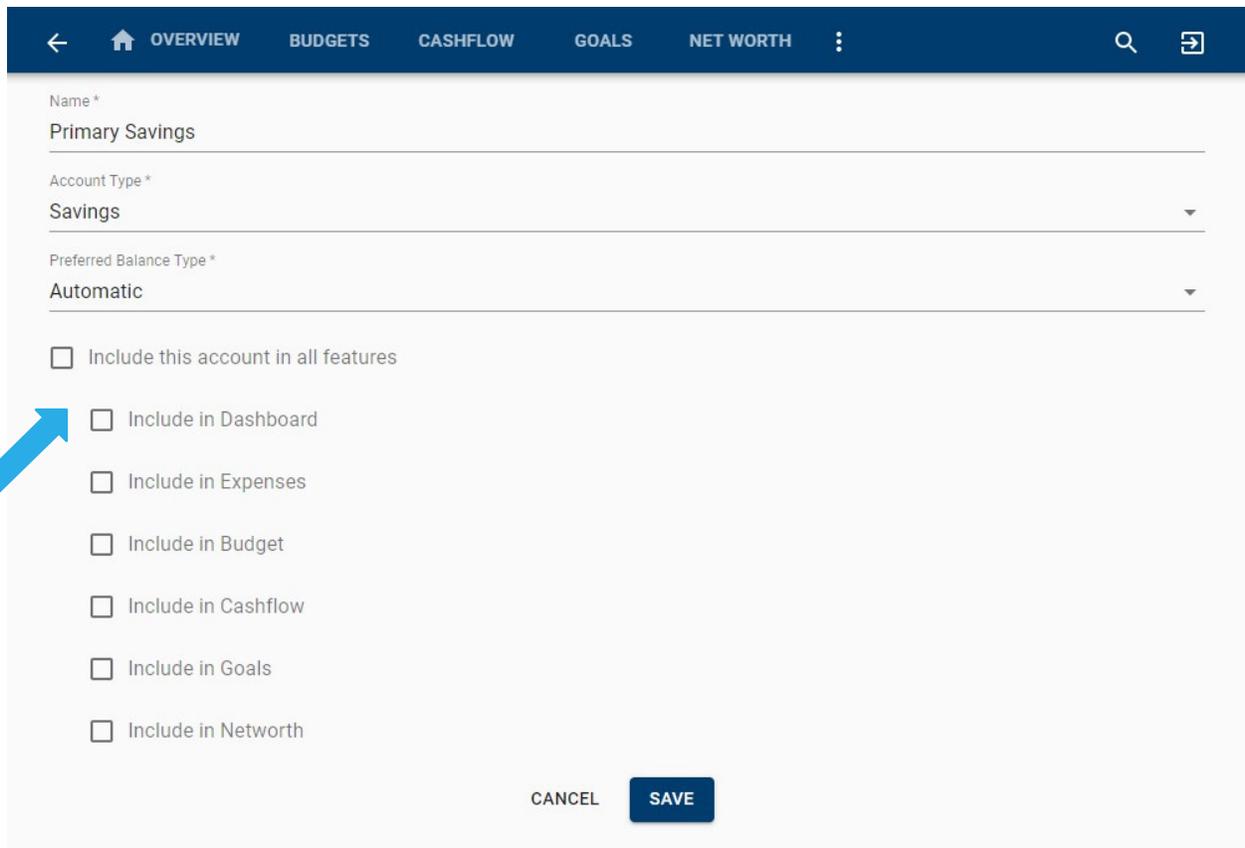
Step 2: Click the *Edit* pen/pencil button next to the account you are wanting to work with.

Account Name	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  Loan	\$21,982.78 >
Investments	\$89,078.11
401(k) Fidelity  Investment	\$89,078.11 >

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.

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



The screenshot shows a mobile application interface for configuring account insights. At the top is a dark blue navigation bar with a back arrow, a home icon, and menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. On the right side of the bar are a search icon and a share icon. Below the navigation bar is a form with the following fields:

- Name \***: Primary Savings
- Account Type \***: Savings (dropdown menu)
- Preferred Balance Type \***: Automatic (dropdown menu)

Below these fields is a list of checkboxes for selecting features to include:

- Include this account in all features
- Include in Dashboard
- Include in Expenses
- Include in Budget
- Include in Cashflow
- Include in Goals
- Include in Network

A blue arrow points to the 'Include in Dashboard' checkbox. At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'.

Step 4: Click Save.