

Insights

How to Add Income and Bills to the Cashflow Calendar

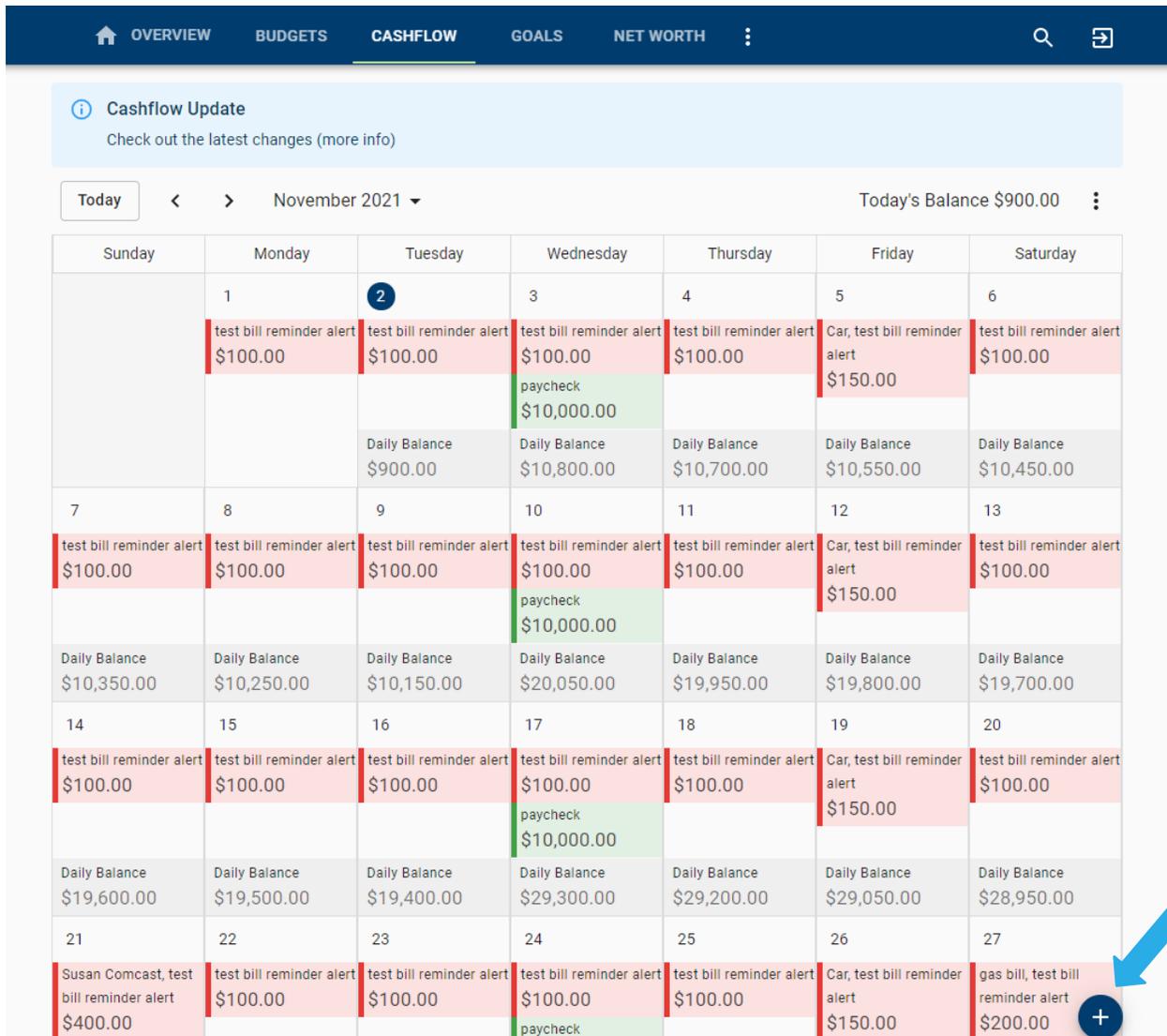
Step 1: Navigate to *Insights* and select the *Cashflow* button on your dashboard; or choose the *Cashflow* tab on the toolbar.

The screenshot displays the 'Insights' dashboard with a dark blue navigation bar at the top. The navigation bar includes tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A blue arrow points to the 'CASHFLOW' tab. Below the navigation bar, the 'Cashflow' section is visible, showing a current balance of \$1,000.00 and a 7-day projection of \$10,150.00. A list of transactions includes a bill reminder for -\$100.00 on Nov 2, a paycheck for \$10,000.00 on Nov 3, and another bill reminder for -\$100.00 on Nov 3. A blue arrow points to the 'VIEW CASHFLOW >' button. To the right, the 'Net Worth' section shows a total net worth of \$203,084.33, which is down 84% in the last 3 months. It also breaks down into Assets (\$280,078.11, down 78%) and Debts (\$76,993.78, up 79%). A blue arrow points to the 'VIEW NET WORTH >' button. A banner at the top right of the dashboard reads 'Home ownership can be more than just a dream' with a 'Mortgages >' link.

| Category | Amount | Change | Period |
|-----------------|--------------|----------|---------------|
| Total Net Worth | \$203,084.33 | Down 84% | last 3 months |
| Assets | \$280,078.11 | Down 78% | last 3 months |
| Debts | \$76,993.78 | Up 79% | last 3 months |

Insights

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



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*.

Insights

Step 3: Click the *Bill* or *Income* tab and complete the following fields.

The screenshot shows a financial management application interface. At the top, there are navigation tabs: OVERVIEW, BUDGETS, CASHFLOW (selected), GOALS, and NET WORTH. Below the tabs, there's a 'Cashflow Update' section with a sub-header 'Check out the latest changes (more info)'. The main area displays a calendar for November 2021, showing daily balances and transactions. A modal form is overlaid on the calendar, allowing the user to add a new entry. The form fields are:

- Income Name *: Stimulus Check
- Amount *: \$ 1,500.00
- Frequency *: Once
- Start On Date: Nov 1, 2021

The modal also features a 'BILL' tab (inactive) and an 'INCOME' tab (active). A 'SAVE' button is located at the bottom right of the modal. The background calendar shows a grid of days with various transactions, including 'test bill reminder alert' and 'paycheck' entries.

Step 4: Click Save.