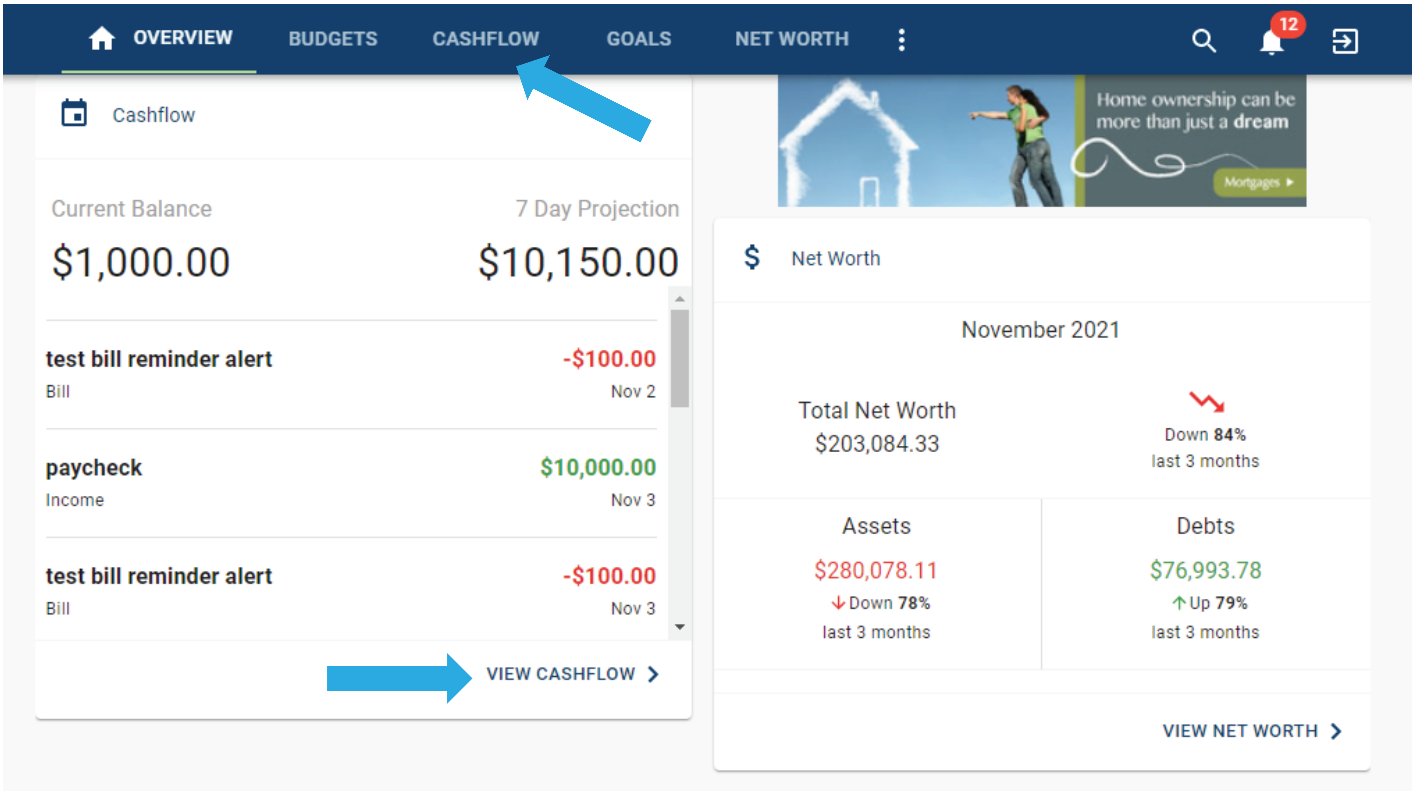
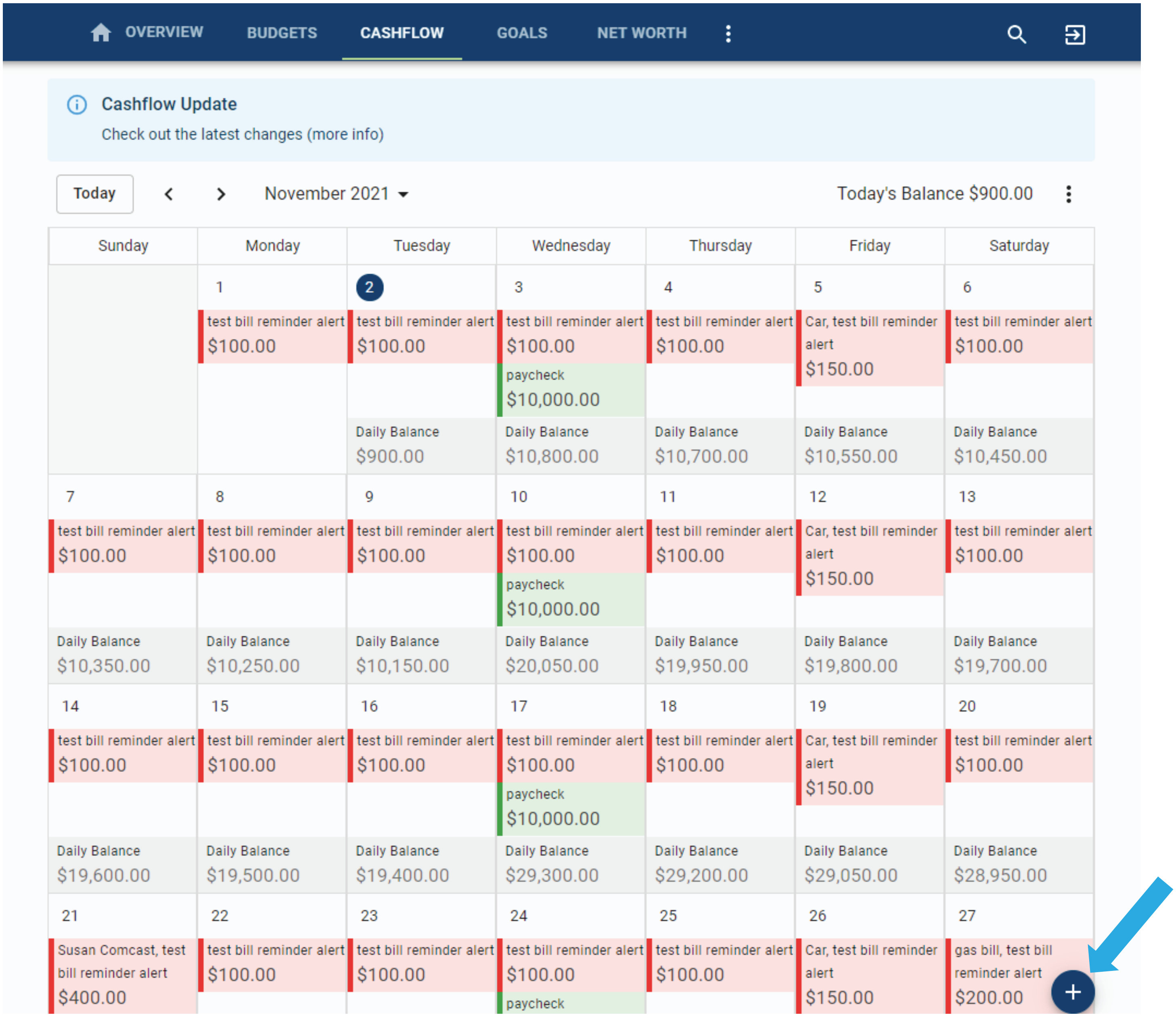
How to Add Income and Bills to the Cashflow Calendar

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

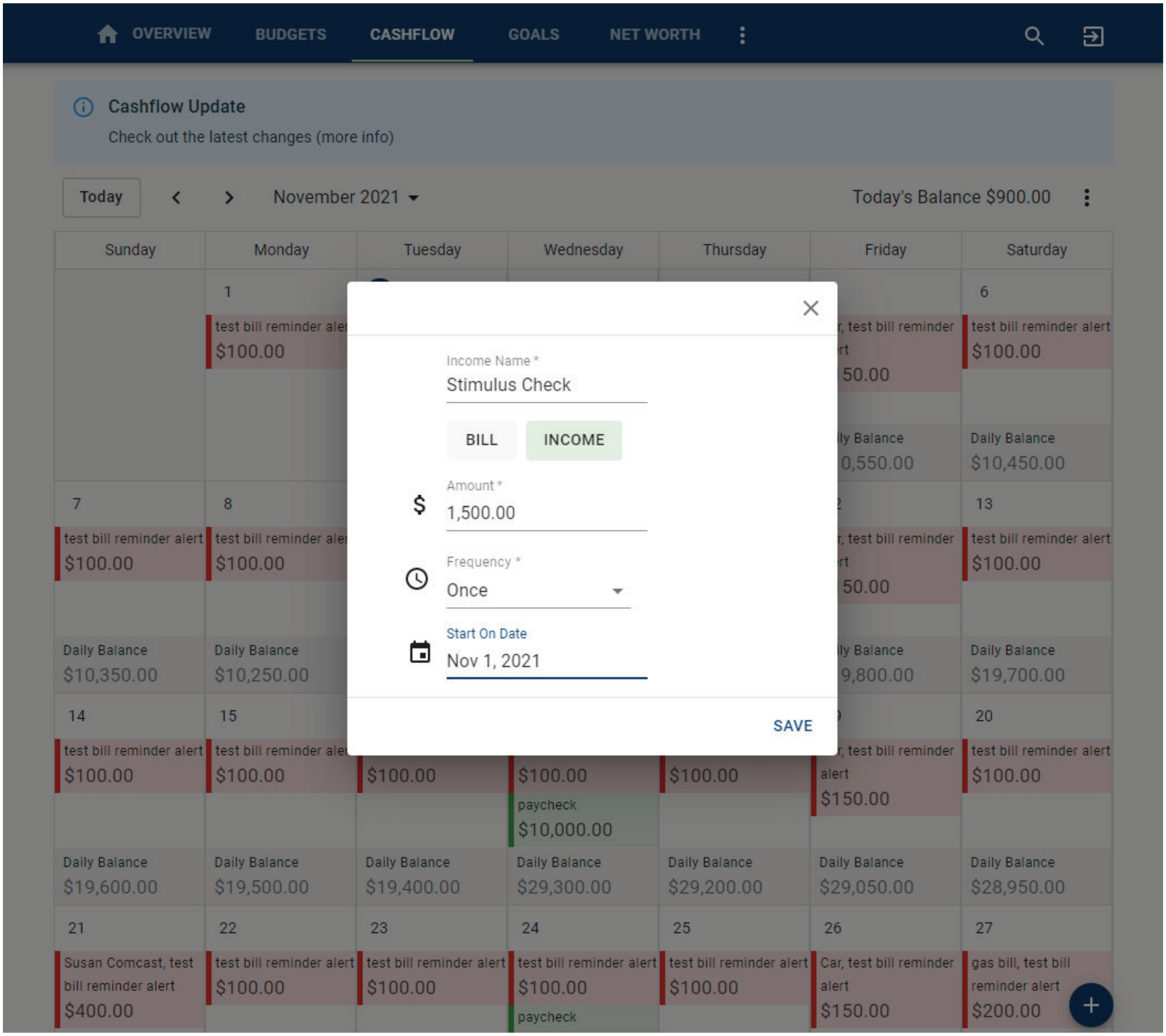


Step 2: Click the *Plus* icon in the bottom right-hand corner of the screen.



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*.

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



Step 4: Click Save.