

BLUE MONEY MANAGEMENT QUICK START

Getting the most out of BMM does not require a lot of time. It takes just a few minutes to set up a few of the tools in BMM to gain a better view of your financial situation.

Dashboard

1. Add accounts from other financial institutions. Your primary accounts will automatically be added to the first time you use PFM.
2. When you add accounts, your transactions and balances will update accordingly.
3. Your transactions will categorize themselves with 'tags'. To personalize these categories, select the transaction and edit the tag.

Spending Targets

1. Navigate to the Budget tab to create Spending Targets and begin tracking spending by category.
2. Click the 'Add a new spending target' button and follow the prompts to begin track your spending by category. Popular categories to track are groceries, dining out and household.

Cashflow

1. Navigate to the Cashflow tab to see your projected day-to-day cash flow.
2. Add Incomes & Bills like your paycheck, rent or utilities to more accurately forecast your cash flow.

Goals

1. Follow the prompts in the Goals tab to create one or more financial goals.
2. Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.

ADD UPDATE	
Show more information	
CASH	\$5,785.99
Ultimate Checking	\$4,785.99
Complete Savings	\$1,000.00
CREDIT CARDS	\$16,784.98
American Express	\$16,784.98
INVESTMENTS	\$89,078.11
401(k) Fidelity	\$89,078.11

Coffee	YOU'VE SPENT \$40 OF \$75	\$35 LEFT TO SPEND
Diningout	YOU'VE SPENT \$85 OF \$300	\$265 LEFT TO SPEND
Entertainment	YOU'VE SPENT \$31 OF \$200	\$219 LEFT TO SPEND
Household	YOU'VE SPENT \$194 OF \$500	\$306 LEFT TO SPEND
Personal	YOU'VE SPENT \$280 OF \$500	\$267 LEFT TO SPEND

SUN	MON	TUE	WED	THU	FRI	SAT
30	1 \$3,000 \$100 -\$100	2 -\$576	3 -\$500	4	5 \$1,000	6 -\$50
7	8 -\$200 -\$500	9 \$100	10	11	12 \$100 -\$100	13
14	15 -\$400 \$3,000 \$100 -\$200 1 More	16	17 -\$500	18 -\$500	19 \$1,000	20
21	22 \$100	23	24 -\$500	25 \$4,736	26 -\$100	27 \$5,766
\$5,766	\$5,866	\$5,866	\$5,716	\$5,716	\$5,596	\$5,596

401(k) Fidelity	Save \$70 per month to complete
Save for Retirement	01/13/2017 01/31/2027 \$11,580.15 OF \$10,000.00
Complete Savings	Save \$400 per month to complete
Create a Cushion	05/04/2017 05/01/2018 \$470.00 OF \$3,000.00
Save for a Vacation	05/11/2017 06/30/2018 \$530.00 OF \$4,000.00

Congratulations!

You've completed the Quick Start set-up.

Now continue to explore and monitor your finances!