

Money Management™

Alerts

Alerts Summary

Alerts can help you stay in touch with your finances by notifying you of important updates. You receive all alerts in the Notifications tool in the product. You also receive alerts by email if you have email enabled, and by text if you have a mobile phone number enabled.

Select the cog wheel, then Alerts. By default, an account has Simple Alerts enabled. You see on the screen which notifications you'll receive. Note that as our partner MX continues to innovate with this product, those defaults could change.

Your email address may or may not pull through from your Online Banking profile, but it still needs to be verified. Either type it in or check that it's the address you want, then verify it following the instructions. I've already verified the email address in this account, so you don't see those instructions here. If you want to receive text alerts, enter your mobile number and verify it.

To disable a specific alert, simply select that one and it's crossed off. Re-enable it by selecting it again. To disable all alerts, select the **Disable Alerts** button. You can re-enable them at any time.

If you want more control, switch to Detailed Alerts. Here you specify which accounts you want to receive alerts on and the amount that will trigger an alert. Think about which accounts are important to receive alerts on. For example, a low balance on my 401k is likely to be very different from a low balance on my primary checking account, so I probably would not set a low balance alert on my 401k.

Let's start with budget alerts, of which there are two possible ones. A red icon means that delivery method is active; a yellow icon means it's not available – remember I don't have a mobile phone number set up. Select the icons to turn that delivery method off or back on. Remember that both these delivery methods can be inactive but you'll still receive alerts via Notifications. To disable the alert completely, just uncheck the box.

The other alerts are per account. For instance, I'll expand the low account balance section. Change the amount by selecting that box and entering your new value. Now let's say I decide I really would like mobile alerts, because I just can't let this account balance get too low. I could scroll back to the top to set up that number. But it's faster to select that icon here - a popup lets me enter my phone number and then verify it.

By setting up Alerts that are meaningful to your budget and your accounts, you've given yourself another tool to use on your road to financial success.

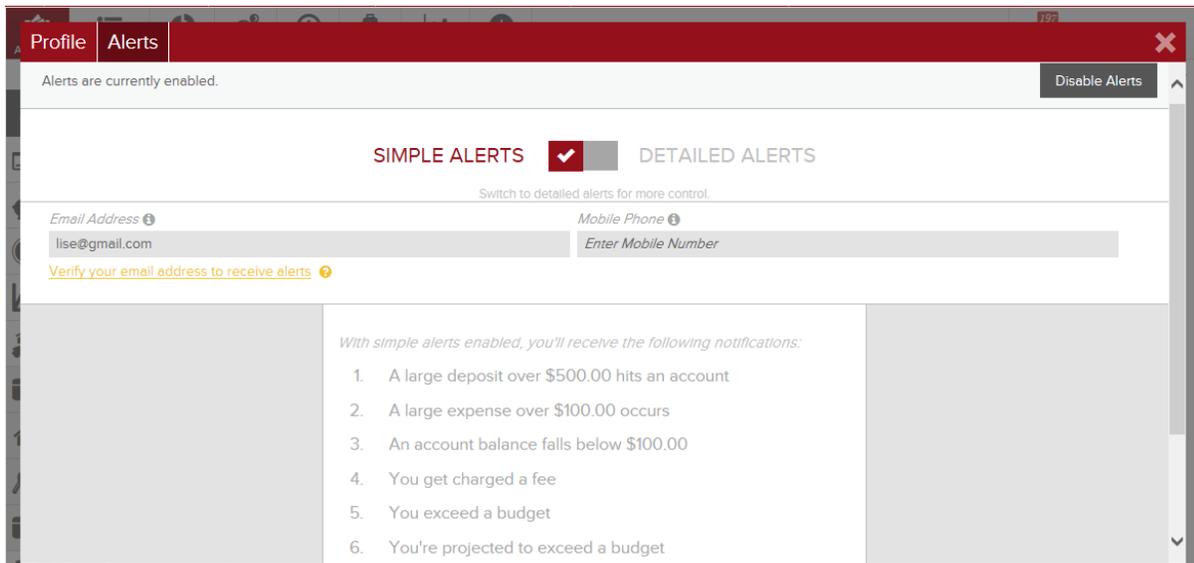
Money Management™

Alerts

Alerts FAQs

- Click the Settings Gear Icon to get to this screen.
- Alerts are sent to the Notifications section of the product. If you also want to receive alerts via email, you must first verify your email by clicking on the yellow "Verify your email address" (as seen on the screenshot). Repeat the process for Mobile Phone if you want to receive alerts via text.
- Alerts are triggered at login or once every 24 hours.

Simple Alerts automatically sets up your alerts with the most popular configuration. Just click on the alert to turn it on or off, or disable all alerts.



Money Management™

Alerts

Switch to **Detailed Alerts** if you want to choose which accounts have alerts, what values trigger an alert and how alerts are delivered.

Budget Alerts		Email	Text
<input type="checkbox"/>	EXCEEDED BUDGET		
<input checked="" type="checkbox"/>	PROJECTED TO EXCEED BUDGET		

Account Alerts	
<input checked="" type="checkbox"/>	LOW ACCOUNT BALANCE
<input checked="" type="checkbox"/>	LARGE DEPOSIT
<input checked="" type="checkbox"/>	LARGE EXPENSE/WITHDRAWAL
<input checked="" type="checkbox"/>	FEE CHARGED

Note: Your actual notifications may differ from the above screenshot.

Alert Type: Exceeded Budget

- Triggered any time spending in a category exceeds the budgeted amount. Example: You have exceeded your Food & Dining budget by \$12.

Alert Type: Low Account Balance

- Triggered any time an account falls below a specified amount Example: An account balance falls below \$100

Alert Type: Large Deposit

- Triggered any time there is a deposit above a specified amount. Example: An income transaction of \$1,500 occurs.

Alert Type: Large Expense

- Triggered any time there is an expense transaction above a specified amount. Example: A large expense over \$100 occurs.

Alert Type: Fee Charge

- Triggered any time there is transaction categorized within "Fees & Charges".