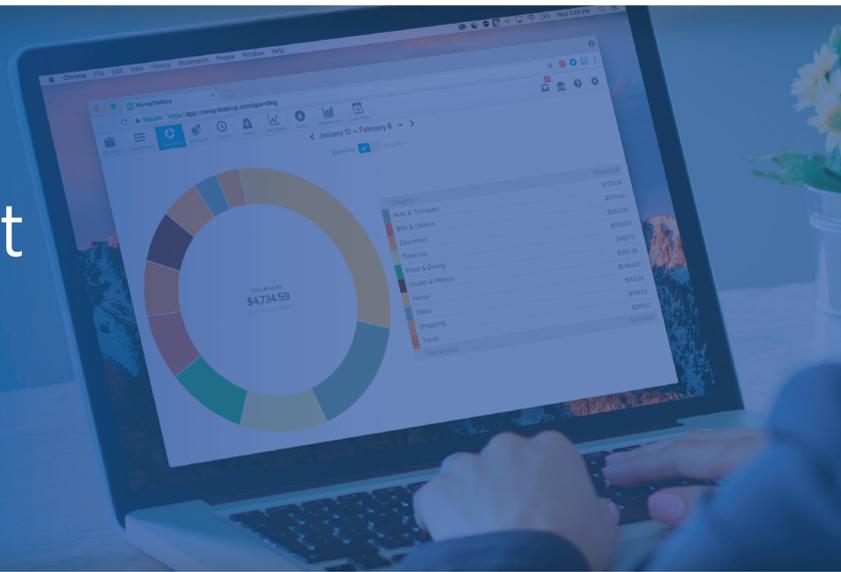


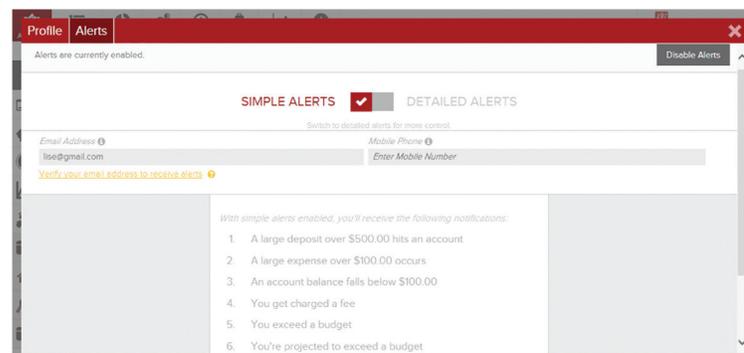


Money Management Alerts



- 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.



Detailed Alerts

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

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”.

