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.

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A	Profile Alerts					>	\$
	Alerts are currently enabled.					Disable Alerts	^
C			SIMPLE ALERTS	*	DETAILED ALERTS		
			Switch to de	etailed	alerts for more control.		
	Email Address 🚯			٨	Mobile Phone 🚯		
(lise@gmail.com				Enter Mobile Number		11
	Verify your email address to receive alerts	0					I
		With	simple alerts enabled, yo	ou'll rea	ceive the following notifications:		I
		1.	A large deposit over	\$500	0.00 hits an account		
		2.	A large expense over	r \$100	0.00 occurs		H
1		3.	An account balance f	falls b	elow \$100.00		
2		4.	You get charged a fe	e			
-		5.	You exceed a budge	t			
		6.	You're projected to e	excee	d a budget		۲



Alerts

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

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		SIMPLE ALERTS	DETAILED ALERTS		^			
Switch to simple alerts for less detail.								
En	nail Address 🚯		Mobile Phone 🚯					
0	lbuser1@gmail.com		Enter Mobile Number					
Budg	et Alerts			Email	Text			
	EXCEEDED BUDGET			×	Z			
	PROJECTED TO EXCEED BUDGET							
Account Alerts								
	LOW ACCOUNT BALANCE				~			
	LARGE DEPOSIT				•			
/ 🗸	LARGE EXPENSE/WITHDRAWAL				-			
	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".

