Alerts FAQs

Note: These FAQs are taken from the in-product help. If you're assisting users and you're in your own account so you can talk then through their issue more effectively, you can find this information there.

- Click the Settings gear icon at upper right
- Alerts are sent to the Notifications section of the product (bell icon)

- If you also want to receive alerts via email, first verify your email by clicking on the <u>Verify</u> next to the email address field. If you want to receive alerts via text, enter your mobile number and verify it.
- Notifications will be delivered nightly after account information has been updated. Budget alerts will be grouped into one email. Other alerts will appear in separate emails.
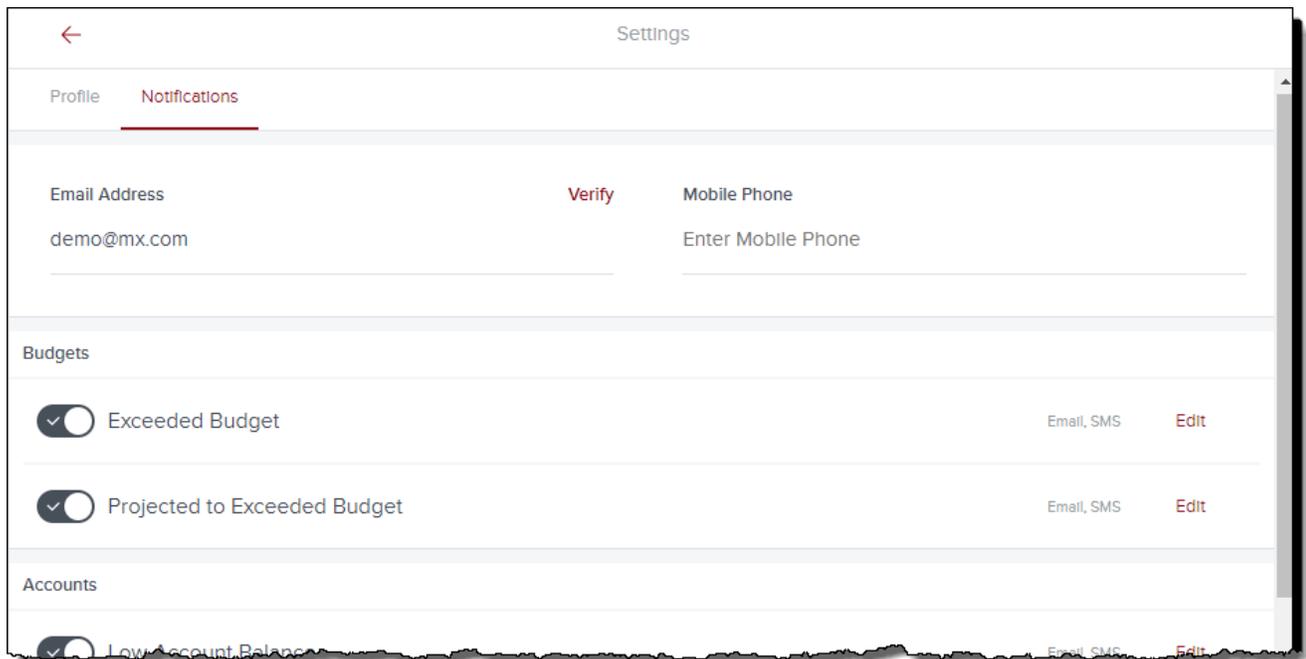
<u>Managing Alerts:</u>

- Use the toggle switch to enable or disable each alert

- Click "Edit" to choose how to receive alerts, to choose which accounts will be tracked, and/or to change the amount at which an alert is triggered (Account alerts only)

Budgets			
Exceeded Budget		Email, SMS	Edit
Projected to Exceed Budget		Email, SMS	Edit
Accounts			
Debt Payment Reminder		Email, SMS	Edit
Low Account Balance		Email, SMS	Edit
Large Deposit		Email, SMS	Edit
Large Expense		SMS	Edit
Fee Charged		Email, SMS	Edit

Alert Definitions:

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

Projected to Exceeded Budget
- Triggered any time spending in a category is projected to exceed the budgeted amount.

Low Account Balance
- Triggered any time an account falls below an amount specified by the user. Example: An account balance falls below $100

Large Deposit
- Triggered any time there is a deposit above an amount specified by the user. Example: An income transaction of $1,500 occurs.

Large Expense
- Triggered any time there is an expense transaction above an amount specified by the user. Example: A large expense over $400 occurs.

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

Example of In-Product Notifications: (*blurred text is your financial institution name*)	