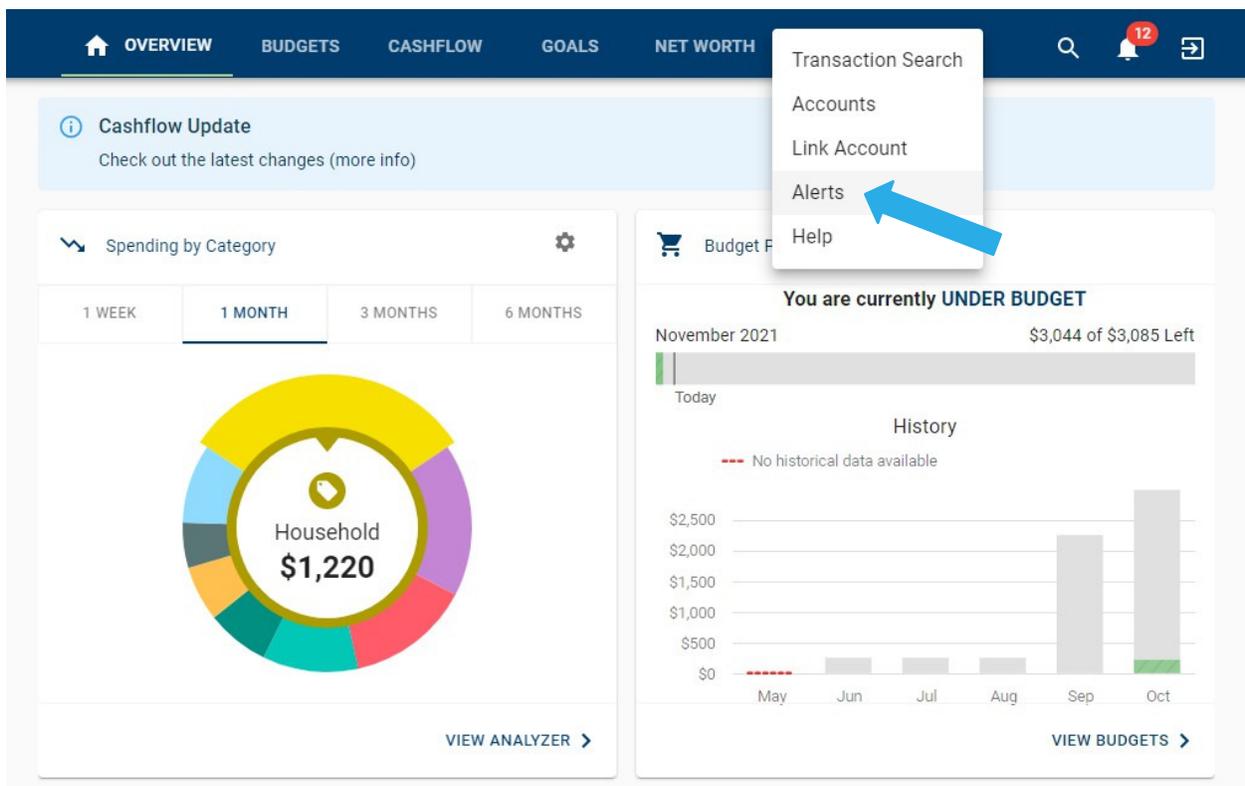


Insights

How to Add an Alert

Step 1: Navigate to *Insights*, select any subcategory and choose the ellipsis (three dots) on the toolbar to select *Alerts*.



Insights

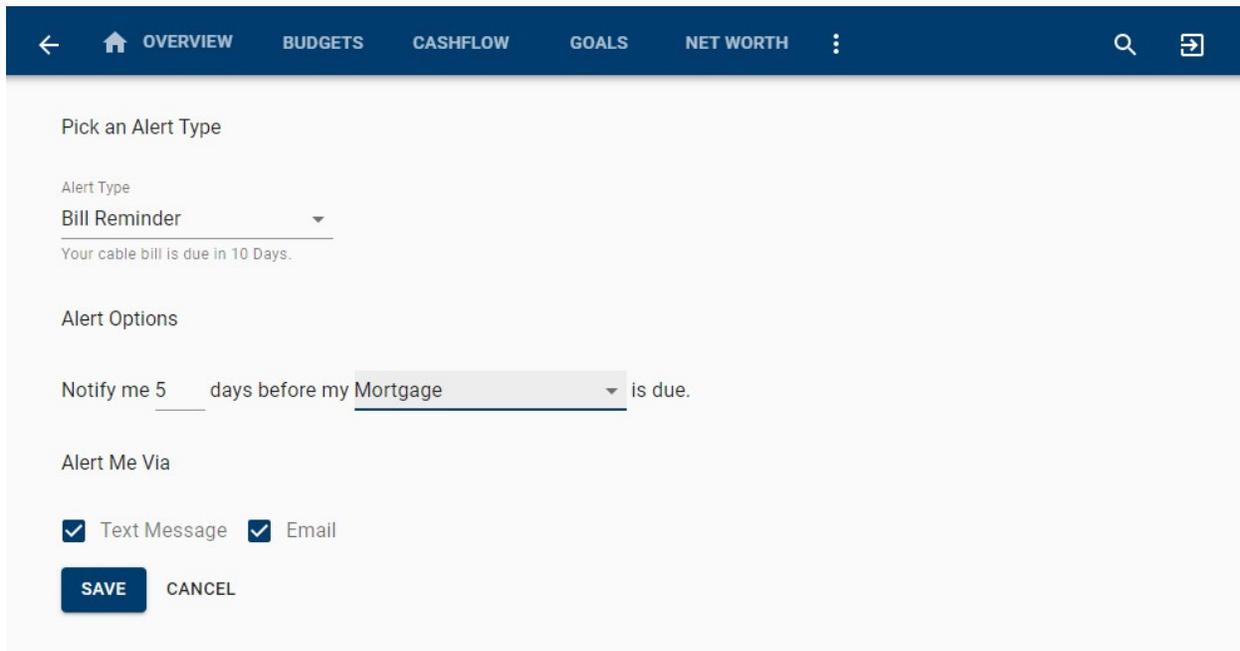
Step 2: Click the *Plus* icon/button in the bottom right-hand corner of the screen. Choose *Add Alert*.

The screenshot shows the 'Insights' app interface. At the top is a dark blue navigation bar with icons for Overview, Budgets, Cashflow, Goals, and Net Worth, along with search and share icons. Below the navigation bar, the main content area is divided into several sections: Account Balance, Goal Progress, Specific Store Purchase, Spending Target Exceeded, and Bill Reminder. Each section contains a list of alerts with a right-pointing chevron icon. A blue arrow points to a plus icon (+) in the bottom right corner of the screen, which is used to add new alerts. Below the plus icon are buttons for 'Add Alert' and 'Contact Info', and a close icon (X).

The More You Know: You can edit your *Alert* contact information (email address and phone number) by choosing the *Plus* icon and then *Contact Info*.

Insights

Step 3: Complete the following fields to create your desired alert.



The screenshot shows a mobile application interface for setting an alert. At the top is a dark blue navigation bar with a back arrow, a home icon, and menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. On the right side of the bar are search and share icons. Below the navigation bar, the main content area is light gray and contains the following sections:

- Pick an Alert Type**: A dropdown menu labeled "Alert Type" with "Bill Reminder" selected. Below it, a preview text reads "Your cable bill is due in 10 Days."
- Alert Options**: A field "Notify me 5" followed by "days before my" and a dropdown menu with "Mortgage" selected, followed by "is due."
- Alert Me Via**: Two checked checkboxes for "Text Message" and "Email".
- At the bottom, there are two buttons: "SAVE" (dark blue) and "CANCEL" (light gray).

Step 4: Click Save.