

## How to Add an Alert

**Step 1:** Navigate to *PFM* and choose the ellipsis (three dots) on the toolbar to select *Alerts*.

The screenshot displays the Geezeo Personal Financial Management (PFM) dashboard. At the top, a navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A search icon, a notification bell with '12' alerts, and a share icon are on the right. A dropdown menu is open, listing 'Transaction Search', 'Accounts', 'Link Account', 'Alerts', and 'Help'. A blue arrow points to the 'Alerts' option. The main content area features a 'Cashflow Update' notification, a 'Spending by Category' donut chart for a household with a total of \$1,220, and a 'Budget F' section. The budget section shows 'You are currently UNDER BUDGET' for November 2021, with \$3,044 of \$3,085 left. A bar chart shows spending history from May to October, with a note 'No historical data available' for the earlier months.

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

The screenshot shows a mobile banking app interface with a dark blue header containing navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon and a share icon are on the right. The main content area is divided into sections: Account Balance, Goal Progress, Specific Store Purchase, and Bill Reminder. Each section lists alerts with a right-pointing chevron. A blue arrow points to a plus icon (+) in the bottom right corner, which is used to add new alerts. Below the plus icon are buttons for 'Add Alert' and 'Contact Info', and a close icon (x).

Account Balance

Notify me when **American** has fallen below **\$1,000**. >

Notify me when **Primary Savings** has fallen below **\$2,000**. >

Goal Progress

Notify me when my **Pay off a credit card** goal is **25%** of the way there. >

Notify me when my **Pay off a credit card** goal is **50%** of the way there. >

Notify me when my **Pay off a credit card** goal is **80%** of the way there. >


Specific Store Purchase

Notify me of a transaction matching **Amazon**. >


Spending Target Exceeded


Notify me when my **Clothes Budget** exceeds **80%**. >

Notify me when my **Books Budget** exceeds **80%**. >

Notify me when my **Baby Expenses Budget** exceeds **50%**. >  

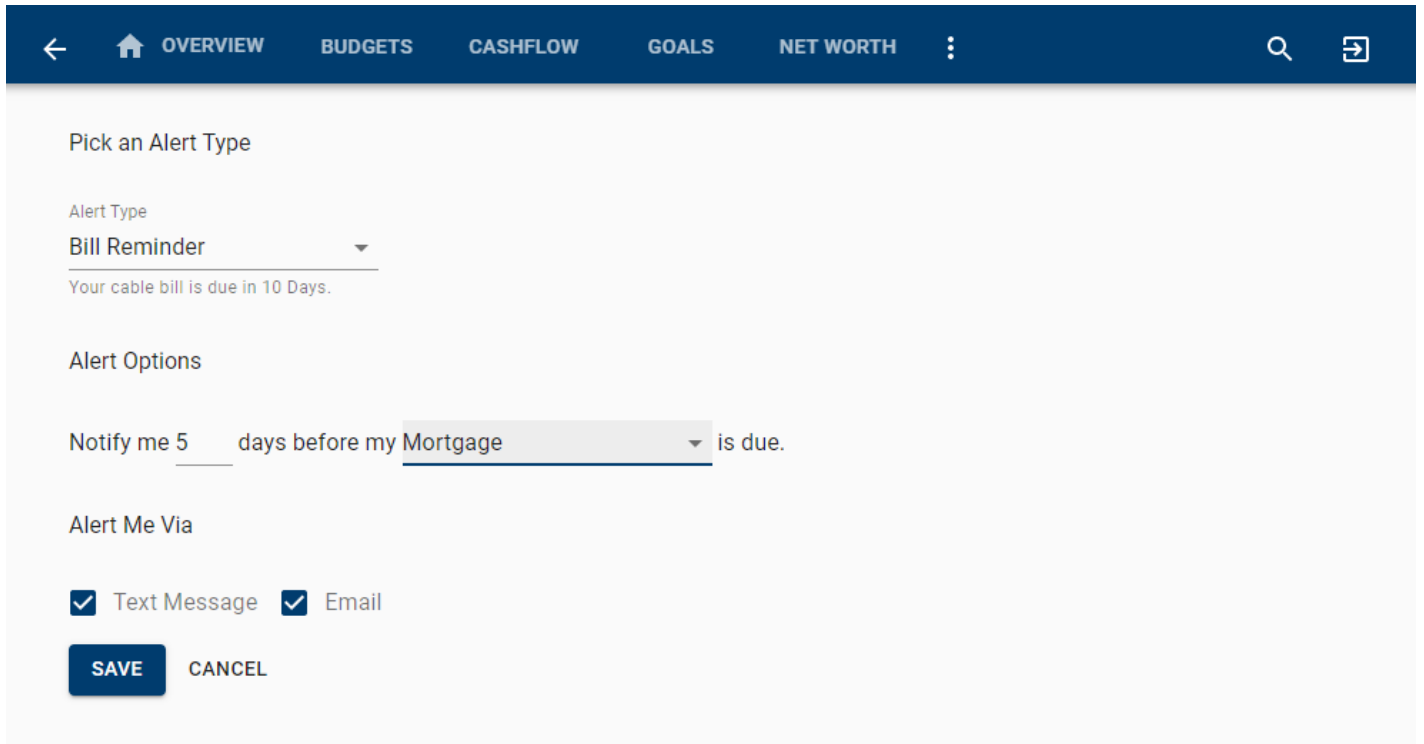
Bill Reminder

Notify me **1** days before my **test bill reminder alert** bill is due. >  



**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*.

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



The screenshot shows a mobile banking application interface. 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 a search icon and a share icon. Below the navigation bar, the screen displays the 'Pick an Alert Type' section. Under 'Alert Type', a dropdown menu is set to 'Bill Reminder', with a preview text: 'Your cable bill is due in 10 Days.' Below this is the 'Alert Options' section, where a text input field contains '5' and is followed by 'days before my' and another dropdown menu set to 'Mortgage', ending with 'is due.' The 'Alert Me Via' section has two checked checkboxes: 'Text Message' and 'Email'. At the bottom of the form are two buttons: 'SAVE' (in a dark blue box) and 'CANCEL'.

**Step 4:** Click Save.