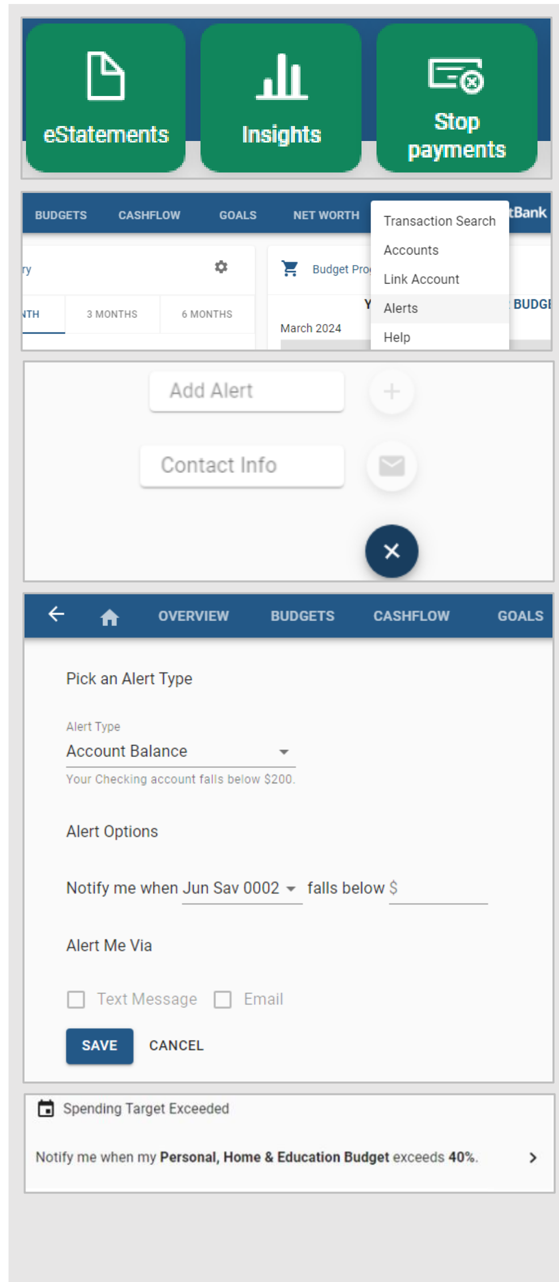
MainStreetBank

DIGITAL BANKING

# How to Add an Alert in Insights

Digital Banking provides the capability to set up Alerts, which can help keep your finances on track wherever you are!




## 01 Navigate to Insights

- From your main dashboard, select the account you want to create an alert for
- From the account dashboard, click the **Insights** tile
- From the Insights dashboard top menu, navigate to the ellipsis (three dots) and
- From the dropdown menu, select **Alerts**

## 02 Add a New Alert

- In the bottom right-hand corner of the Alert screen, click **Plus Sign** and then **Add Alert**
- In the Pick an Alert Type screen, fill all the required fields:
    - Alert Type
    - Alert Option
    - Notify me when (Account Type) falls below (Amount)
    - Alert Me Via
        - Text Message
        - Email
- Click **Save**

## 03 Manage an Existing Alert

- To make an update or delete an Alert, click the **Existing Alert**
- You will be able to update:
    - Notify me when I have spent (Percentage) of (Alert Type)
    - Alert Me Via (Text Message or Email)
- Click **Save**
- If the **Account or Amount** needs to be updated, click **Delete**
- Refer to Step 2 to set a New Alert with the Account and Amount Change