

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:
 - o Alert Type
 - Alert Option
 - Notify me when (Account Type) falls below (Amount)
 - o 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

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