

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. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A dropdown menu is open, showing options: 'Transaction Search', 'Accounts', 'Link Account', 'Alerts', and 'Help'. A blue arrow points to the 'Alerts' option. The main dashboard 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 showing a current status of 'UNDER BUDGET' with \$3,044 of \$3,085 left for November 2021. A bar chart shows spending history from May to October, with a note that no historical data is 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 application interface with a dark blue header bar. The header contains navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH, followed by a search icon and a share icon. Below the header, the main content area is white and displays a list of alerts under various categories. The categories are: Account Balance, Goal Progress, Specific Store Purchase, and Spending Target Exceeded. Each category has one or more alert items, each with a right-pointing chevron icon. In the bottom right corner, there is a floating action menu with three options: 'Add Alert' (with a plus icon), 'Contact Info' (with an envelope icon), and a close button (with an 'x' icon). A blue arrow points to the plus icon in the 'Add Alert' button.

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.

Add Alert

Contact Info

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.

← **OVERVIEW** BUDGETS CASHFLOW GOALS NET WORTH

Pick an Alert Type

Alert Type
Bill Reminder ▼
Your cable bill is due in 10 Days.

Alert Options

Notify me 5 days before my **Mortgage** ▼ is due.

Alert Me Via

Text Message Email

SAVE CANCEL

Step 4: Click Save.