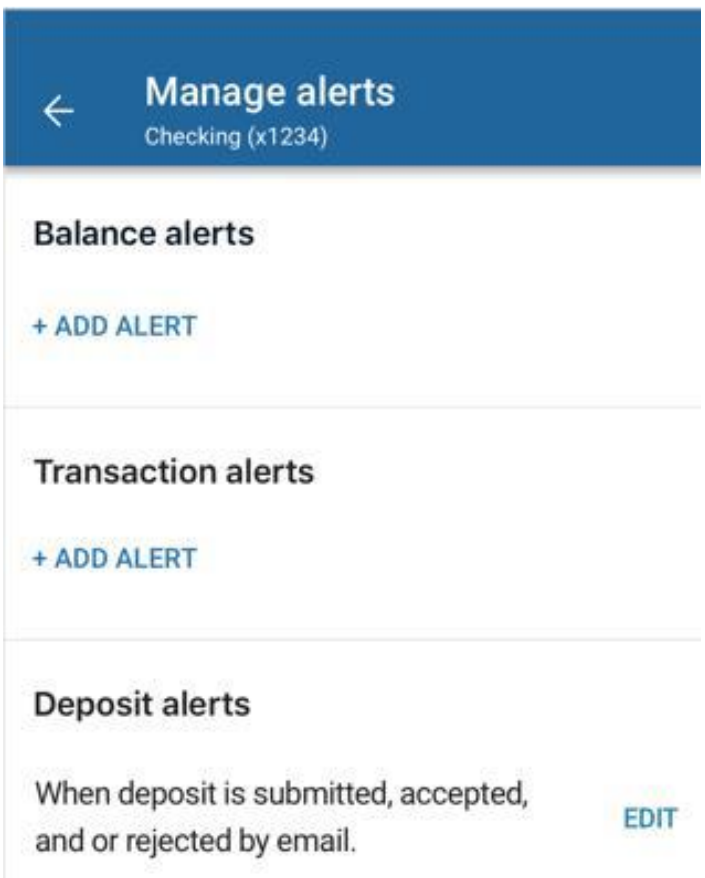
Alert Management Instructions

Alert management

Banno Mobile users can manage which alerts they view through the app, in SMS messages, and in email for their primary financial institution's accounts.

To manage alerts, view the account *Details* screen for a specific account belonging to a user's primary financial institution, and then select **Manage alerts.** Additionally, alert management can be accessed through an account's *Settings* screen.



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Managing transaction alerts

These steps outline the processes for adding and managing transaction alerts.

1- View the *Accounts* section of the dashboard, or select **Accounts** from the main app menu.
2- Select an account belonging to the primary financial institution to bring up the account *Details* screen.
3- Select **Manage alerts.**
4- Choose a situation and follow the corresponding steps:

Situation	Steps
Add an alert	a. In the *Transaction alerts* section, select **Add alert.** b. Select *Credit or Debit*, and then input an amount over which to generate an alert. c. In the *Notify by* section, select *Email, Text Message, or In-App message.* d. Select **Add alert** to save the alert and return to the *Manage Alerts* screen.
Edit an existing alert	a. Select **Edit** next to the transaction alert you want to edit. b. Change the options as desired, and then select **Save** to save the changes and return to the *Manage Alerts* screen.
Delete an existing alert	a. Select **Edit** next to the transaction alert you want to delete. b. Select **Remove** to delete the alert and return to the *Manage Alerts* screen

Managing balance alerts

These steps outline the processes for adding and managing balance alerts.

1- View the *Accounts* section of the dashboard, or select **Accounts** from the main app menu.
2- Select an account belonging to the primary financial institution.
3- Select **Manage alerts**.
4- Choose a situation and follow the corresponding steps:

Situation	**Steps**
Add an alert	a. In the *Balance alerts* section, select **Add alert.** b. Select *Above or Below*, and then input a dollar amount over which to generate an alert. c. In the *Notify by* section, select *Email, Text Message, or In-App message.* d. Select **Add alert** to save the alert and return to the *Manage Alerts* screen.
Edit an existing alert	a. In the *Balance Alerts* selection, select **Edit** next to an existing alert. b. Change the options as desired, and then select **Save** to save the changes and return to the *Manage Alerts* screen.
Delete an existing alert	a. In the *Balance Alerts* section, select an existing alert. b. Select **Remove** to delete the alert and return to the *Manage Alerts* screen

Managing deposit alerts for Ensenta RDC

Use these instructions to understand the process for managing deposit alerts powered by Ensenta in Banno Mobile.

1- View the *Accounts* section of the dashboard, or select **Accounts** from the main app menu.

2- Select an account belonging to the primary financial institution to bring up the account *Details* screen.

3- Select **Manage alerts.**

4- Find the *Deposit alerts* section.
An email alert is set for deposits by default.

5- Choose a situation and follow the corresponding steps:

Situation	Steps
Add an alert	a. In the *Deposit* section, select + **Add alert.** b. In the *Notify* by field, select *Email, Text Message, or In-App Message.* c. Select **Save** to save the alert.
Edit an existing alert	a. In the *Deposit* selection, select **Edit** next to the deposit alert. b. Change the options as desired, and then select **Save** to save the changes.
Delete an existing alert	a. Select **Edit** next to the deposit alert you want to delete. b. Select **Delete** to delete the alert.