

# MY MONEY MAP

Personal Financial Management

## 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 My Money Map dashboard. At the top, a navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A search icon, a notification bell with '12', 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 showing a current budget status of '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 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 the Stone Bank mobile app interface. At the top is a dark blue navigation bar with the following menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, NET WORTH, and a three-dot menu icon. On the right side of the navigation bar are a search icon and a share icon. Below the navigation bar, the screen is divided into several sections:

- Account Balance:** Includes two alerts: "Notify me when **American** has fallen below **\$1,000**." and "Notify me when **Primary Savings** has fallen below **\$2,000**."
- Goal Progress:** Includes three alerts: "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.", and "Notify me when my **Pay off a credit card** goal is **80%** of the way there."
- Specific Store Purchase:** Includes one alert: "Notify me of a transaction matching **Amazon**."
- Spending Target Exceeded:** Includes two alerts: "Notify me when my **Clothes Budget** exceeds **80%**." and "Notify me when my **Books Budget** exceeds **80%**."
- Bill Reminder:** Includes one alert: "Notify me **1** days before my **test bill reminder alert** bill is due."

In the bottom right corner, there are three buttons: "Add Alert" (with a plus icon), "Contact Info" (with an envelope icon), and a close icon (with an 'x' icon). A blue arrow points to the plus icon on the "Add Alert" button.

**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.