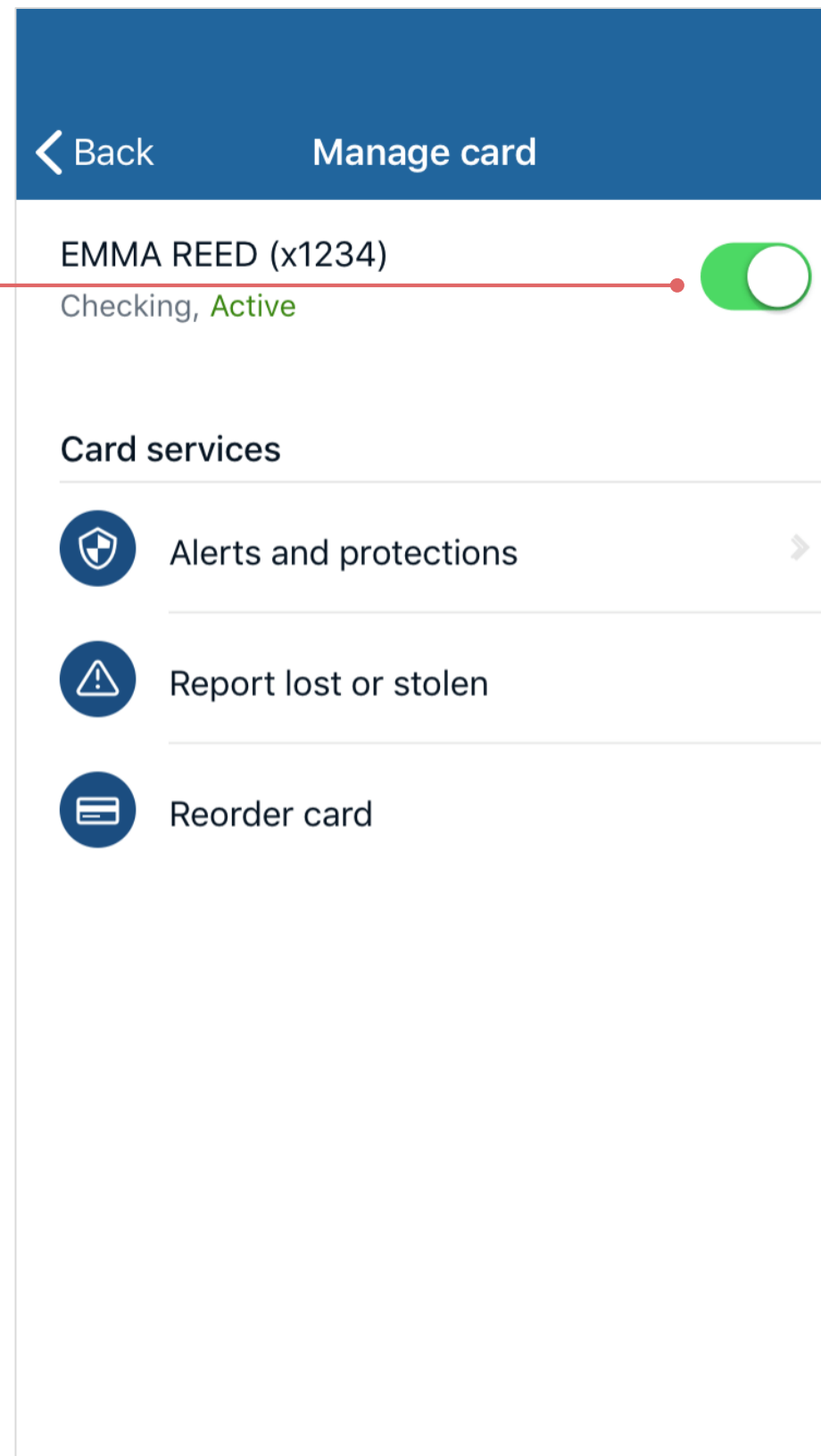

Consumer

S P E C I F I C A T I O N S

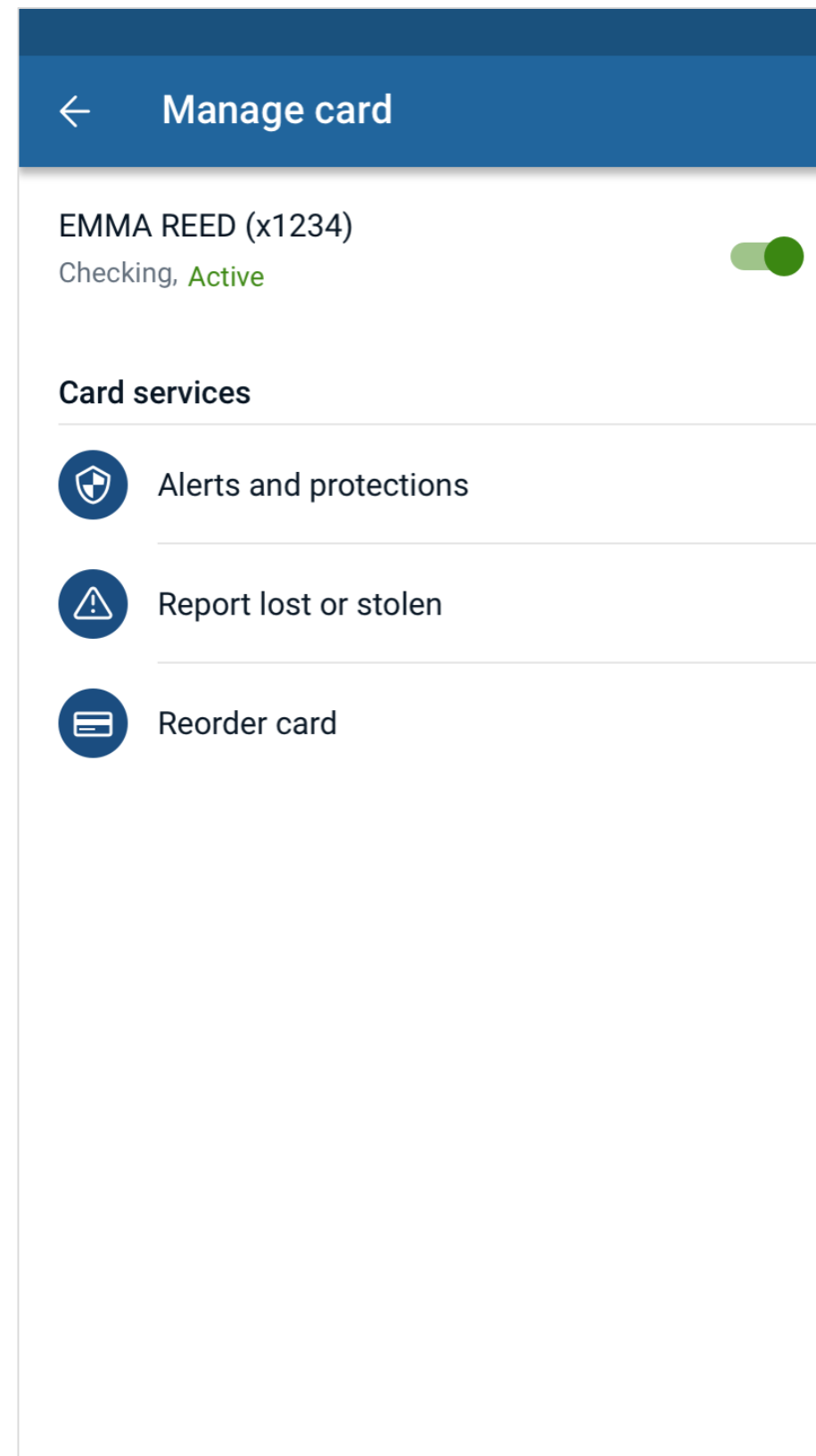
Lock card

Mobile: Card management

1



iOS®



Android™

The ability to turn a card on/off already existed in our app, but the *Manage card* screen got a bit of an overhaul to support the old platform and new.

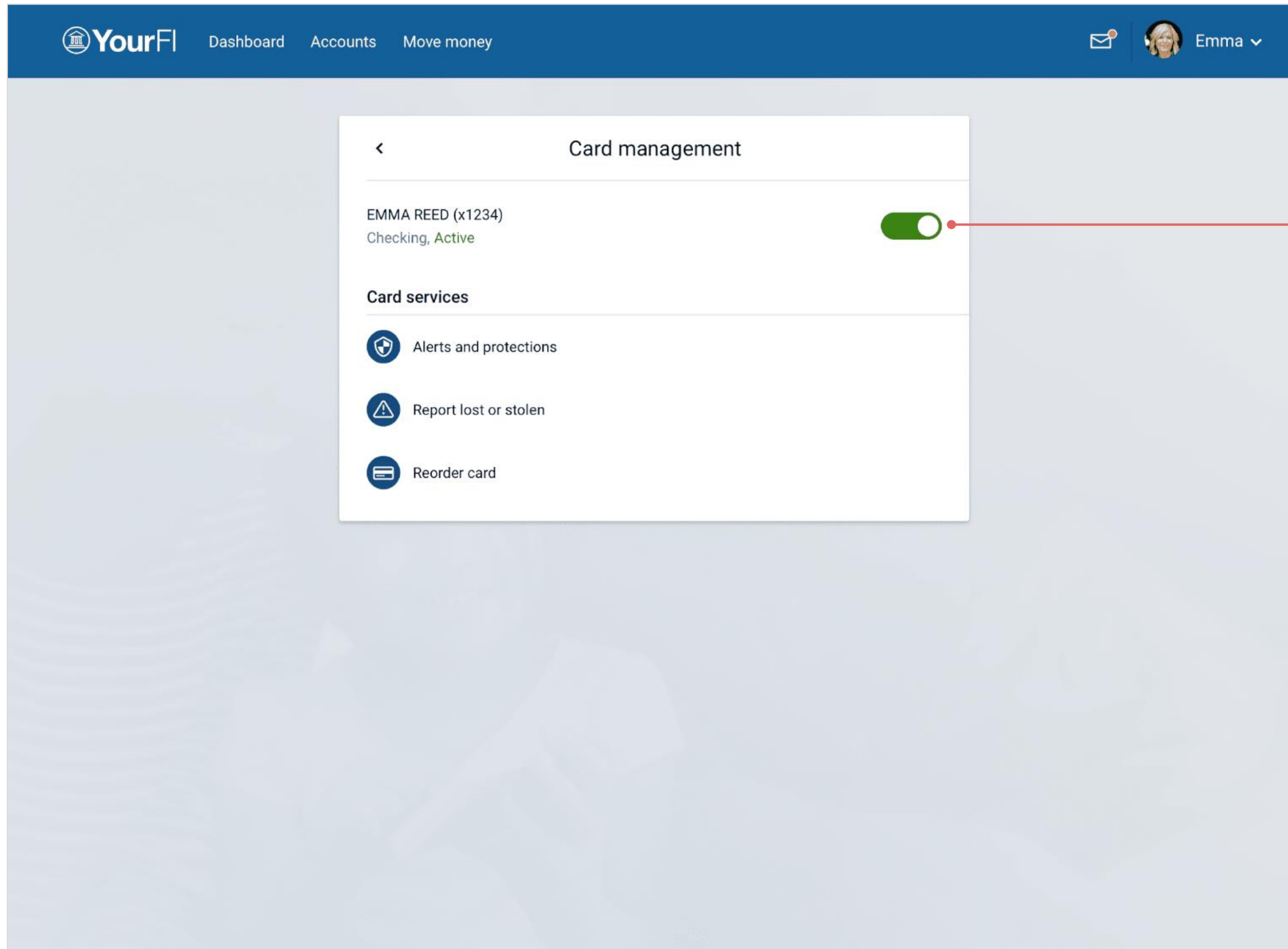
1. Card on/off

Toggleing the switch off triggers a dialog asking the end user to confirm if they'd like to switch the card off (next slide).

If status notates Alerts and protection as unavailable, show as inactive/unavailable similar to other card functions.

Enrollment of a user begins after a user selects the card management screen. Please refer to your MyCardRules contract for pricing and additional billing information.

Online: Card management

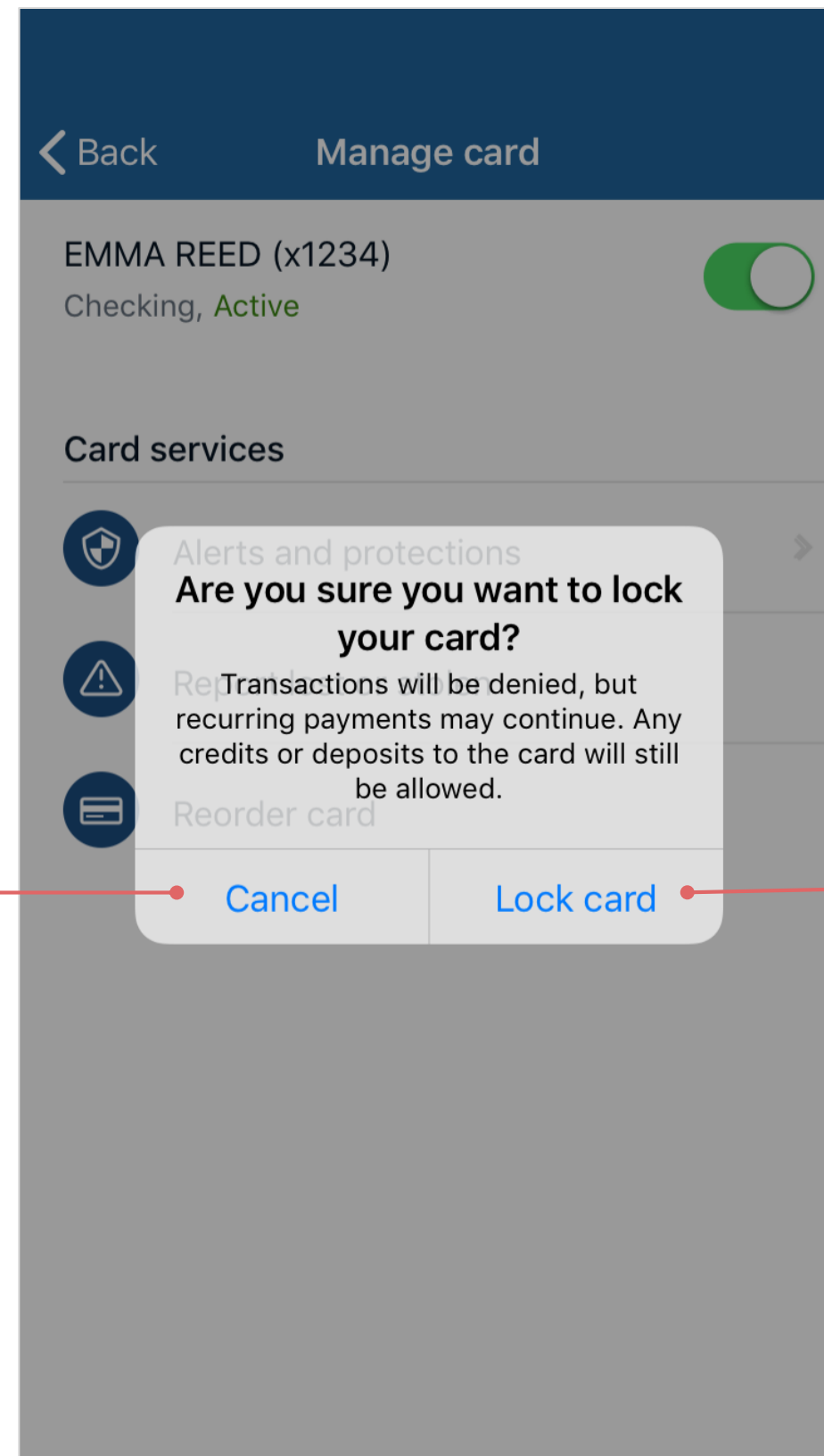


The ability to turn a card on/off already existed in our app, but the *Card management* screen got a bit of an overhaul to support the old platform and new.

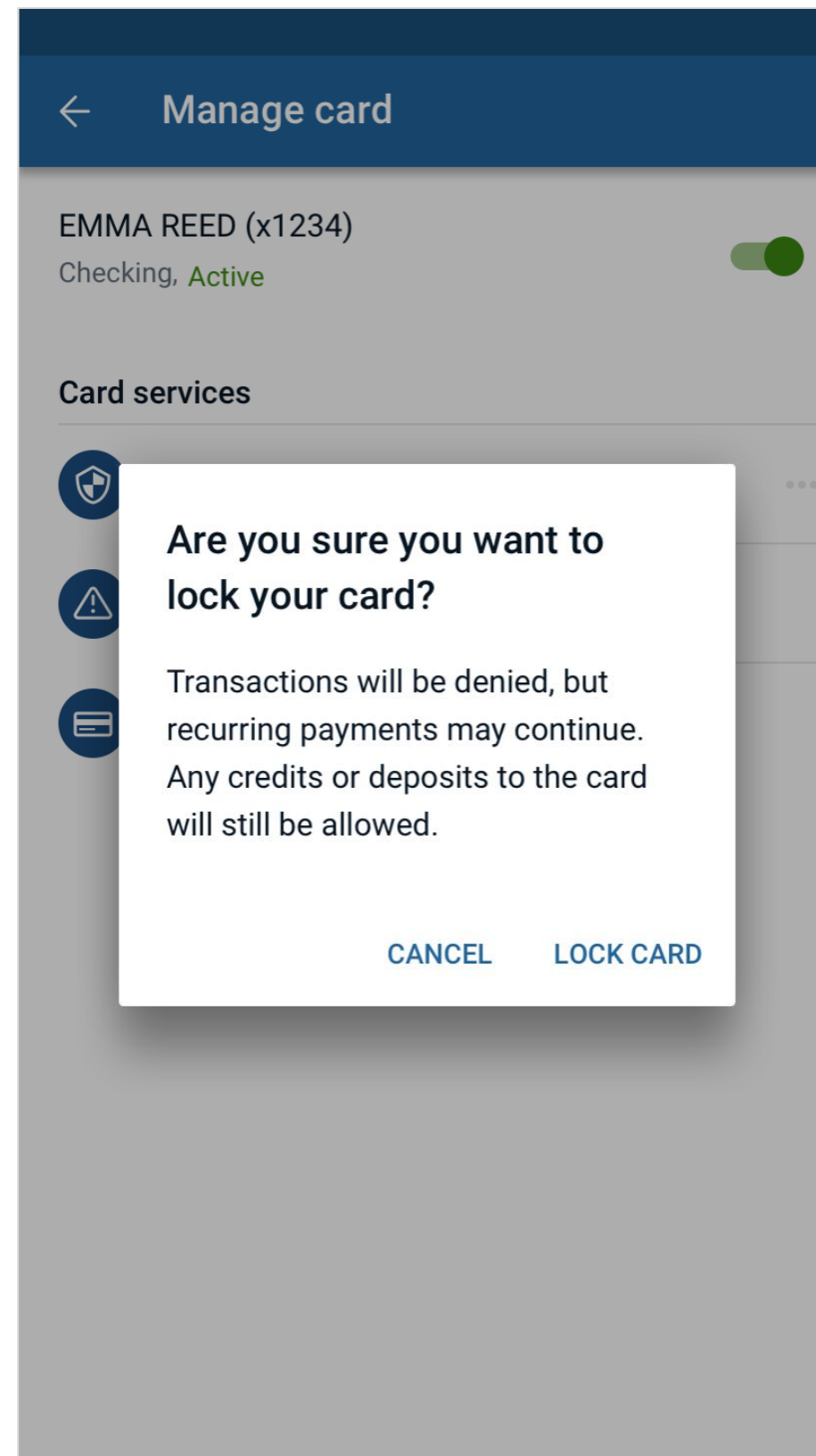
1. Card toggle

toggling the switch off triggers a dialog asking the user to confirm if they'd like to lock the card, deactivating one-time transactions.

Mobile: Lock card alert (debit cards)



iOS®



Android™

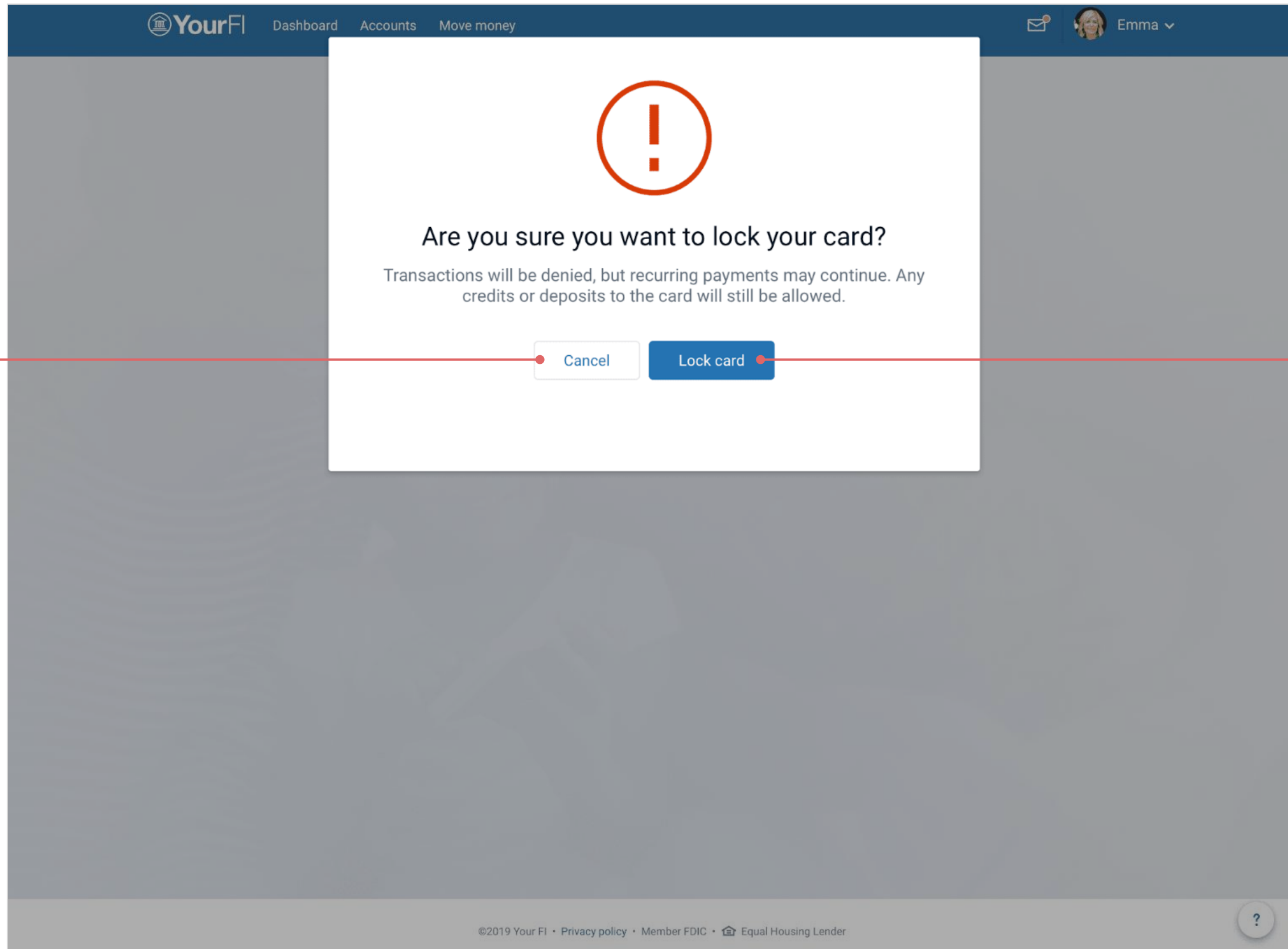
1. Cancel button

Tapping the button dismisses dialog and leaves the card in current state.

2. Lock card button

Tapping the button places the card in a *Locked* state and flips the toggle to its inactive state.

Online: Lock card alert (debit cards)



1. Cancel button

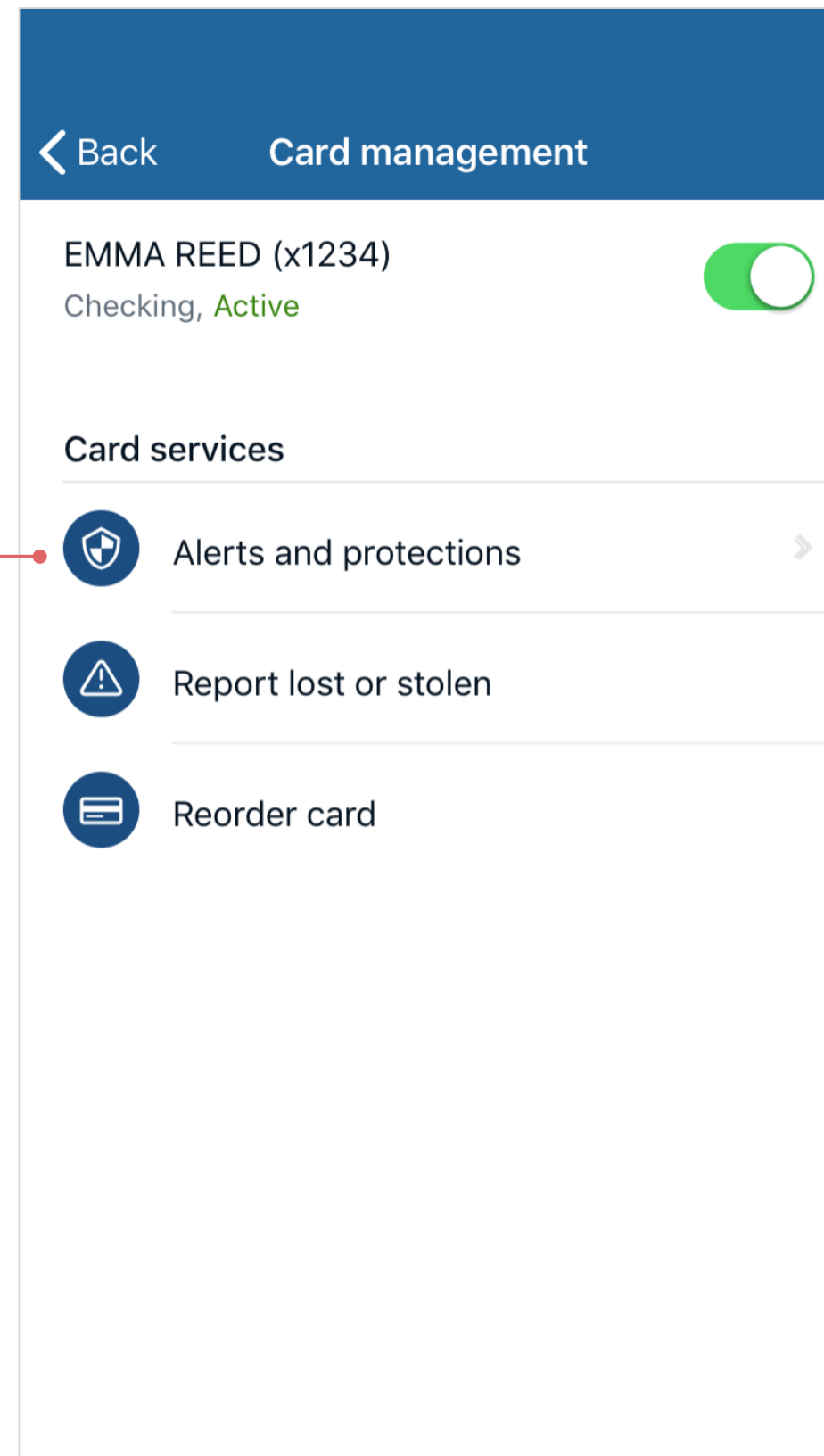
Tapping the button dismisses the dialog and leaves the card in current state.

2. Lock card button

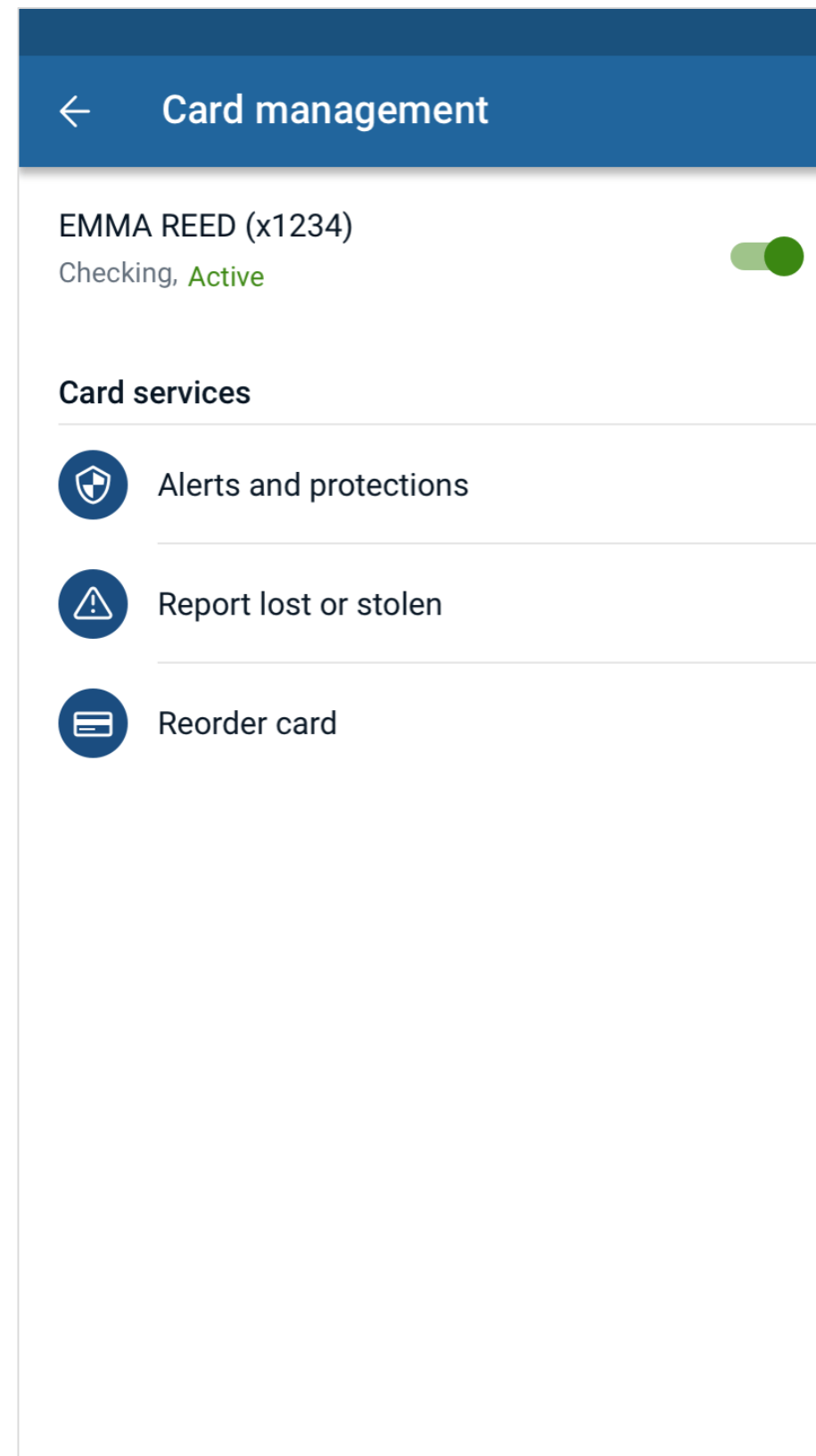
Tapping the button places the card in a *Locked* state and flips the toggle to its inactive state.

Card alerts and protections

Mobile: Card management (debit)



iOS®



Android™

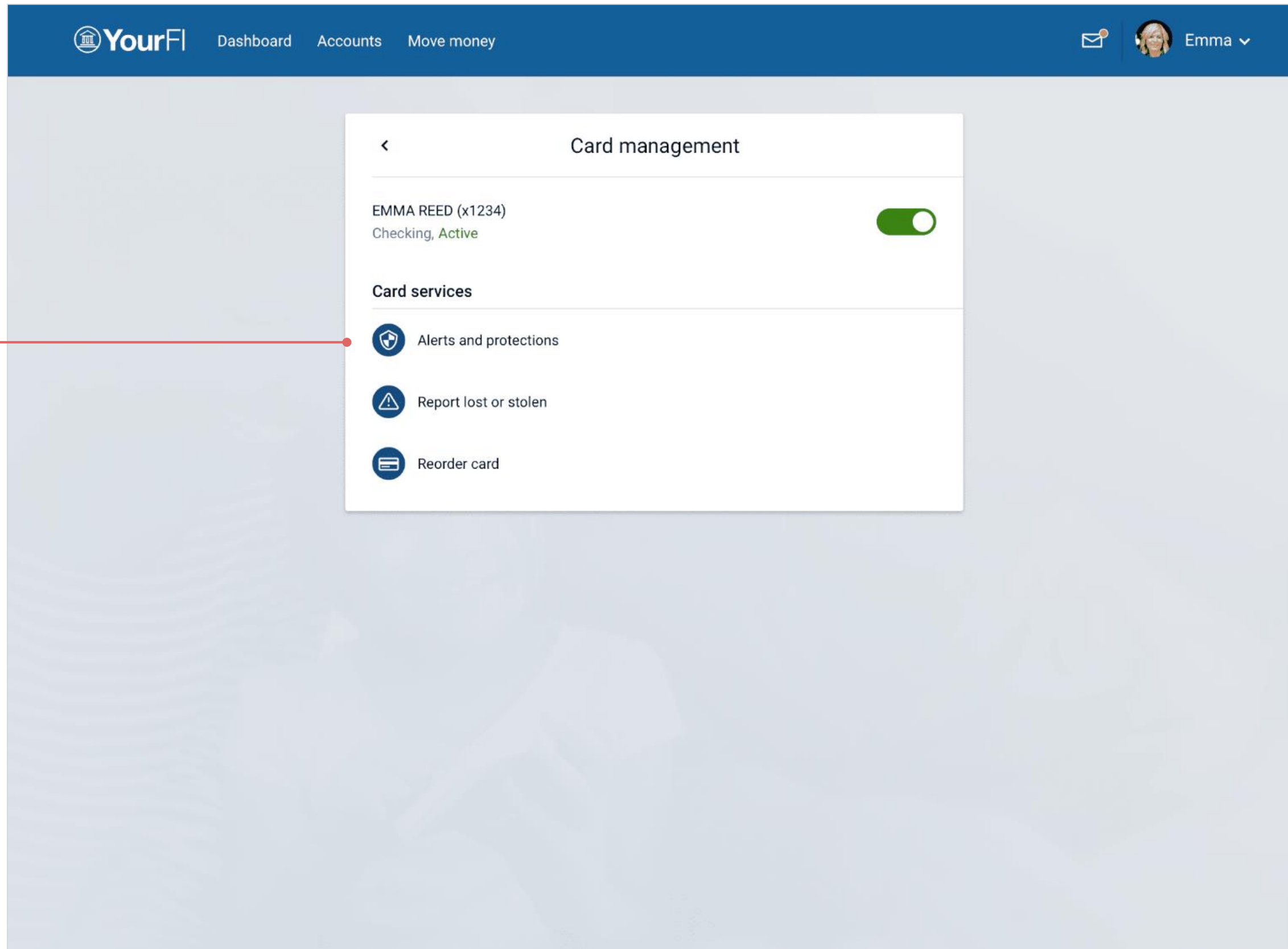
1. Alerts and protections

A new section needs to be added after the action list in the Card management view. Tapping this cell takes you to the Alerts and protections view.

An end user will be able to override card settings. For example, if a wife sets an alert or control and the husband comes in later, he would be able to see those settings and add or remove them.

When the card's status returns as `null`, `Unknown` is displayed for the status.

Online: Card management (debit)



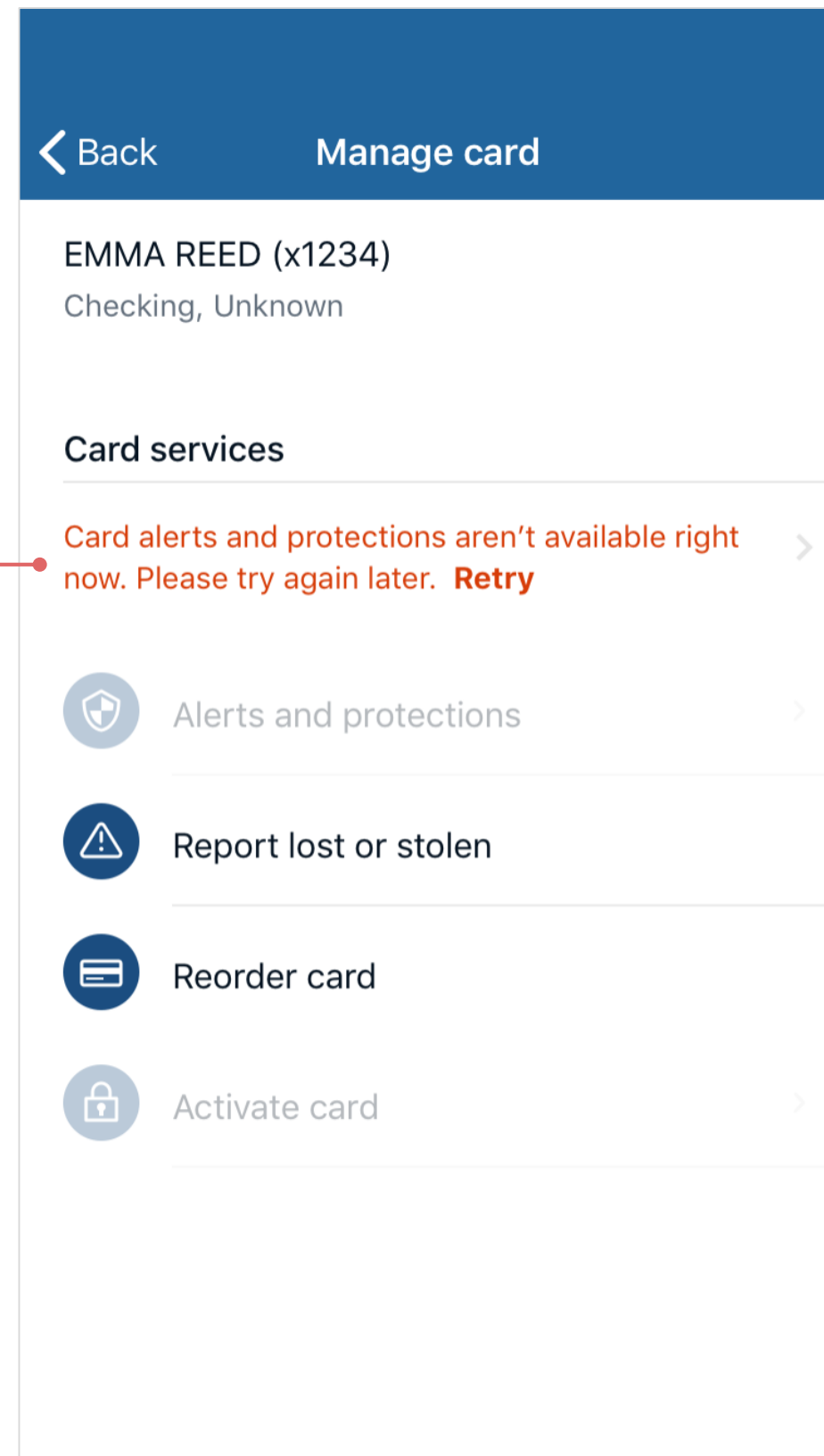
1. Alerts and protection

A new section was added after the action list in the Card management view. Tapping this cell takes you to the Alerts and protection view.

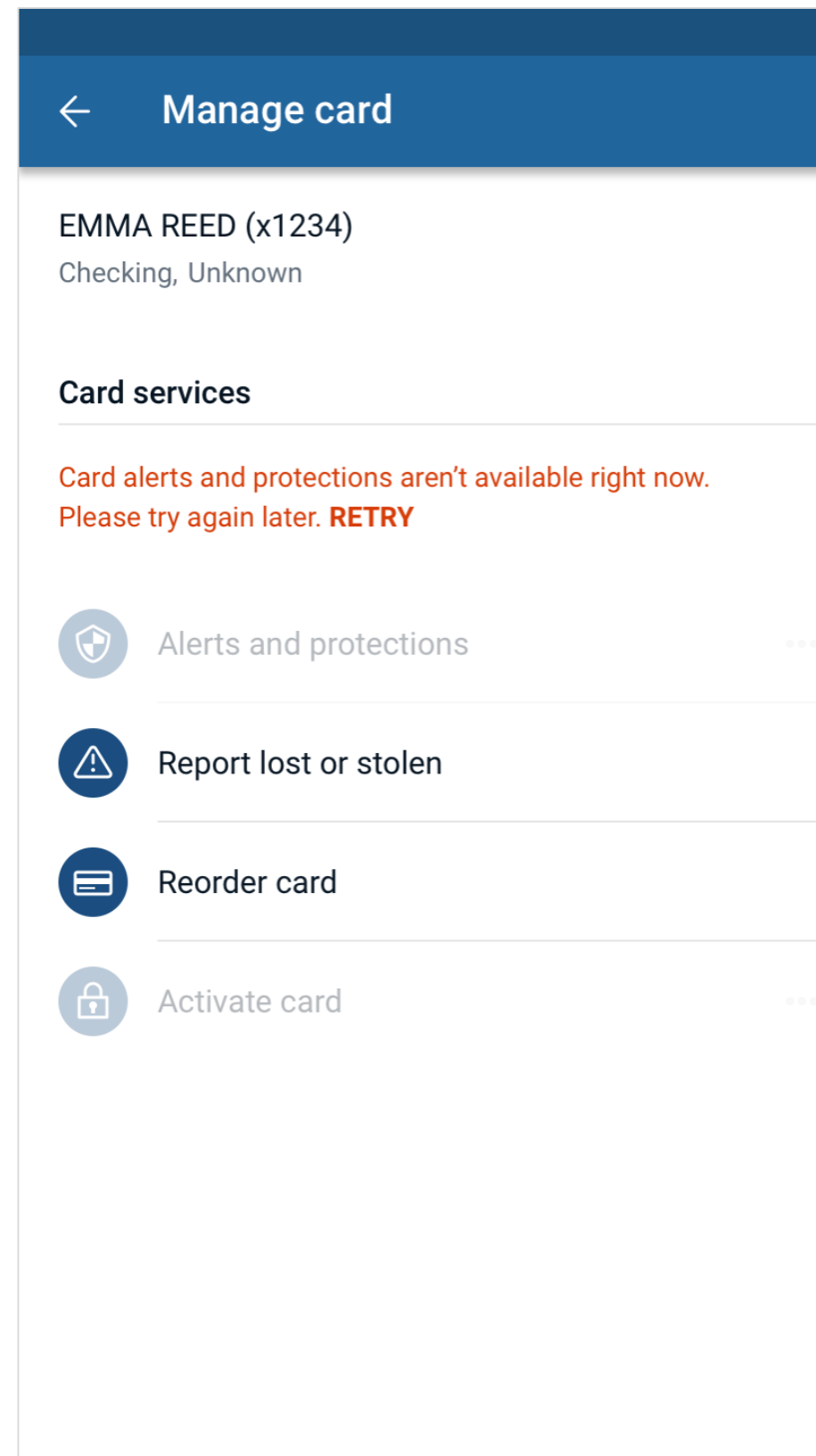
An end user can override card settings. For example, if a wife sets an alert or control and the husband comes in later, he would be able to see those settings and add or remove them.

When the card's status returns as `null`, `Unknown` is displayed for the status.

Mobile: Card management error (500)



iOS®



Android™

We only return controls when a successful call is made. When an error occurs, we don't allow non-OnDot controls to be accessed.

An *Unknown* status is communicated to the end user and indicates that not all of the controls are available.

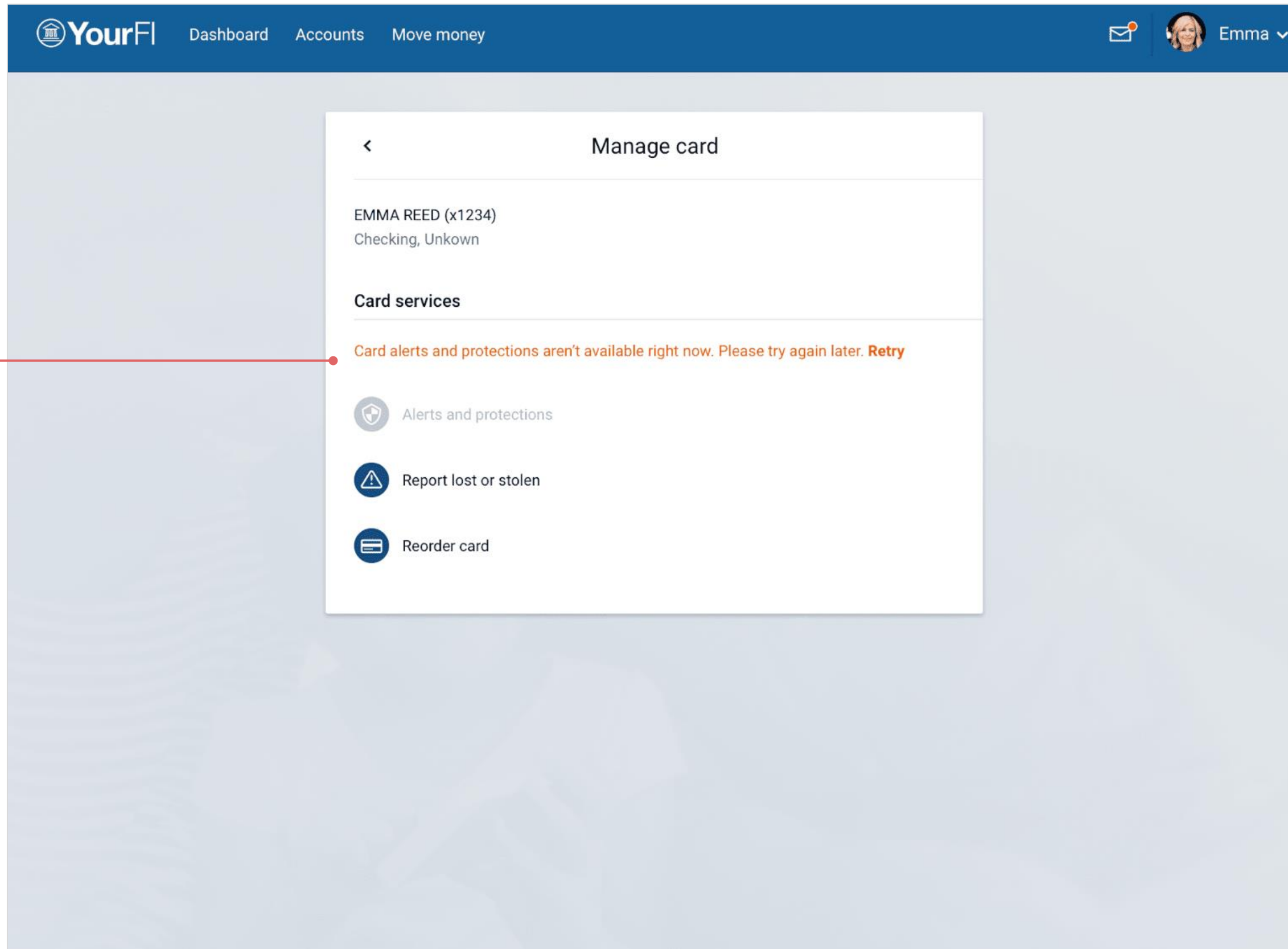
1. 500 error message + Retry

Oops! Your alerts and protection controls aren't available right now. **Retry**

Retry makes the call again.

Alerts and protections Item shows as inactive if the card can manage alerts and protections but it has no configuration object. This updates after a successful GET call.

Online: Card management error (500)



We only return controls when a successful call is made. When an error occurs, we don't allow non-OnDot controls to be accessed.

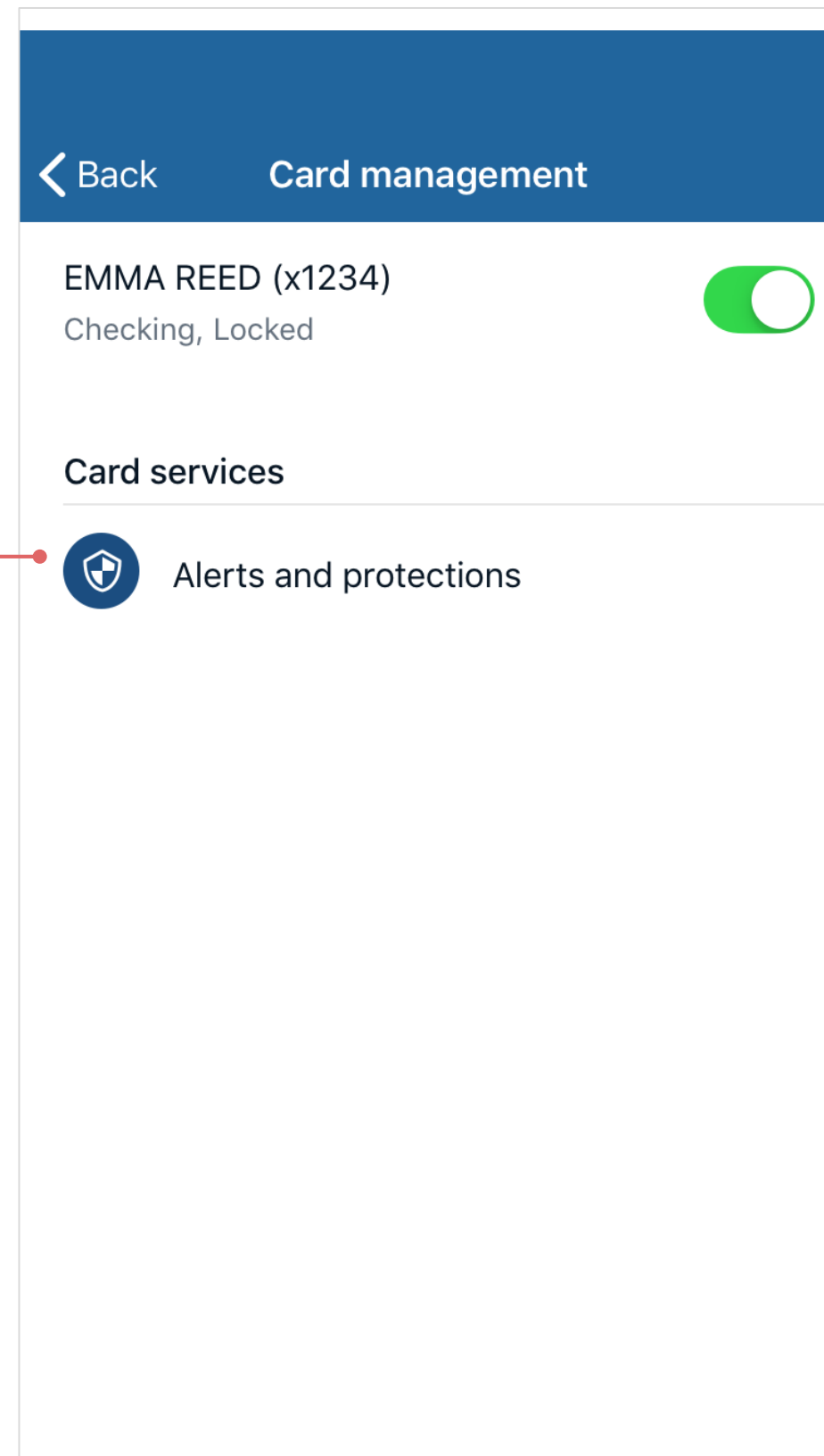
An *Unknown* status is communicated to the end user and indicates that not all of the controls are available.

1. 500 error message + Retry

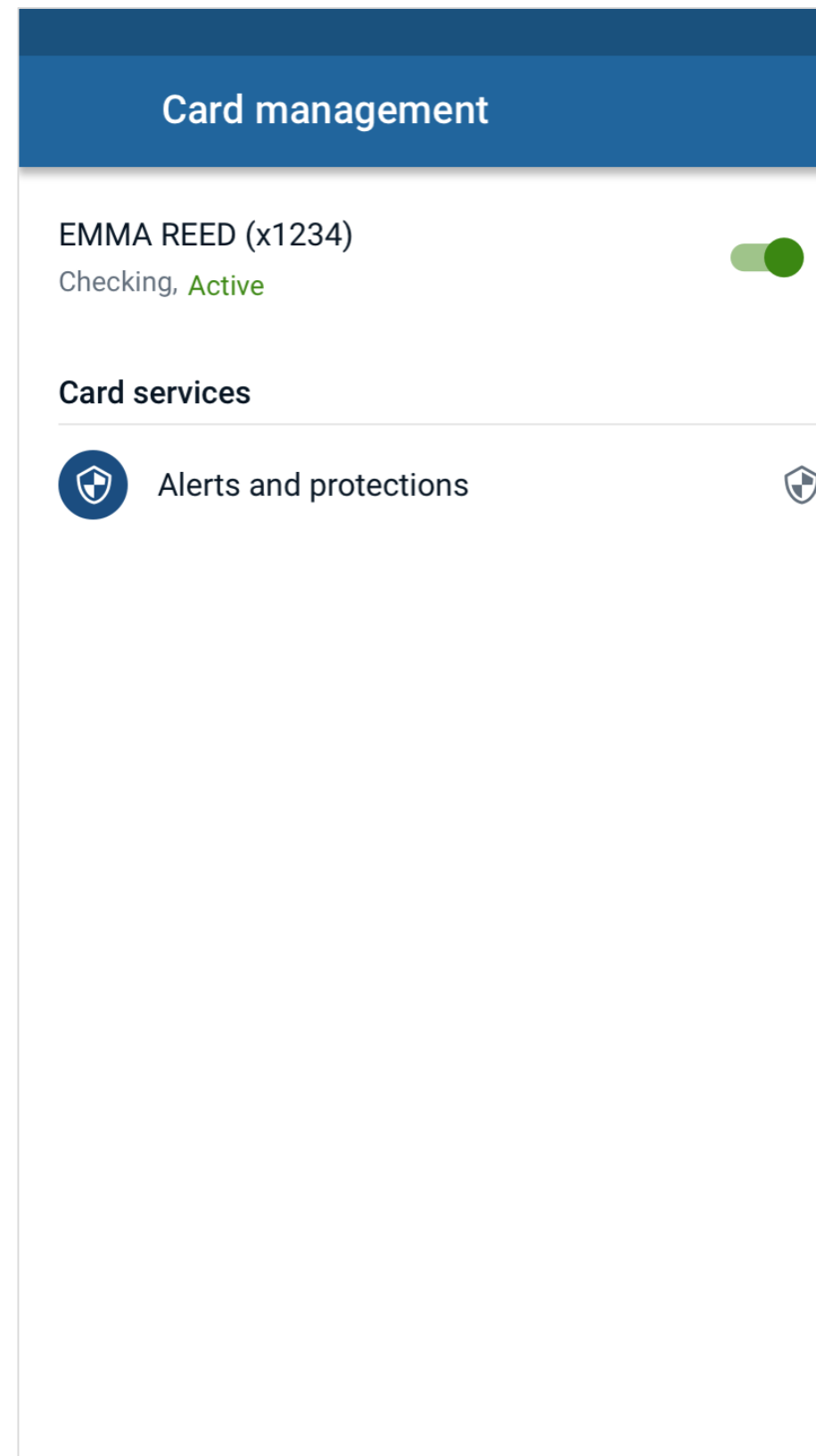
Oops! Your alerts and protection controls aren't available right now. **Retry**

Retry makes the call again.

Card management (credit)



iOS®



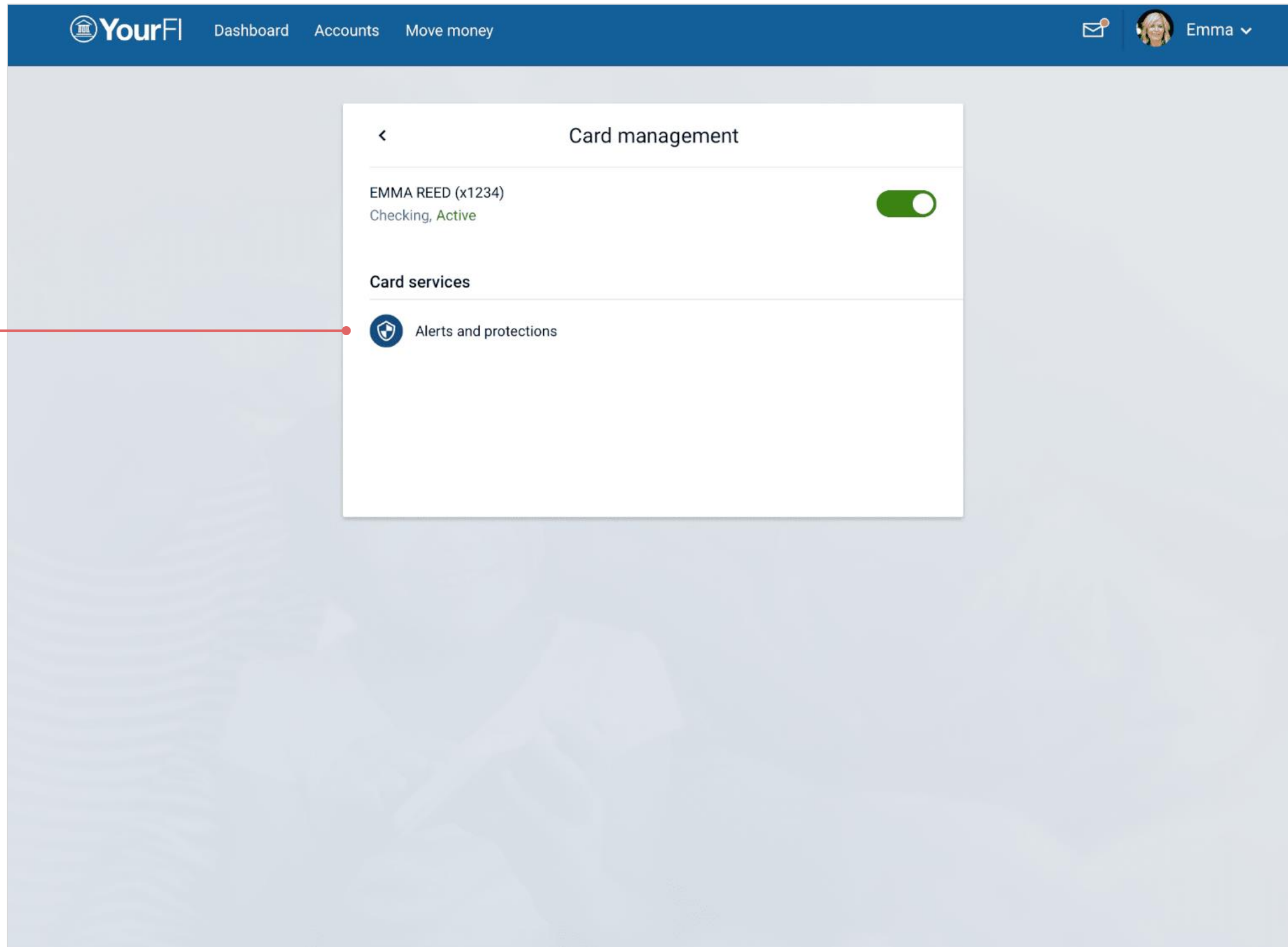
Android™

For credit cards, we hide the section that shows the abilities tied to our debit cards (Report lost/stolen, Re-order card, Activate new card).

1. Alerts and protections

A new section was added after the action list in the *Card management* view. Tapping this cell takes you to the *Alerts and protections* view.

Online: Card management (credit)

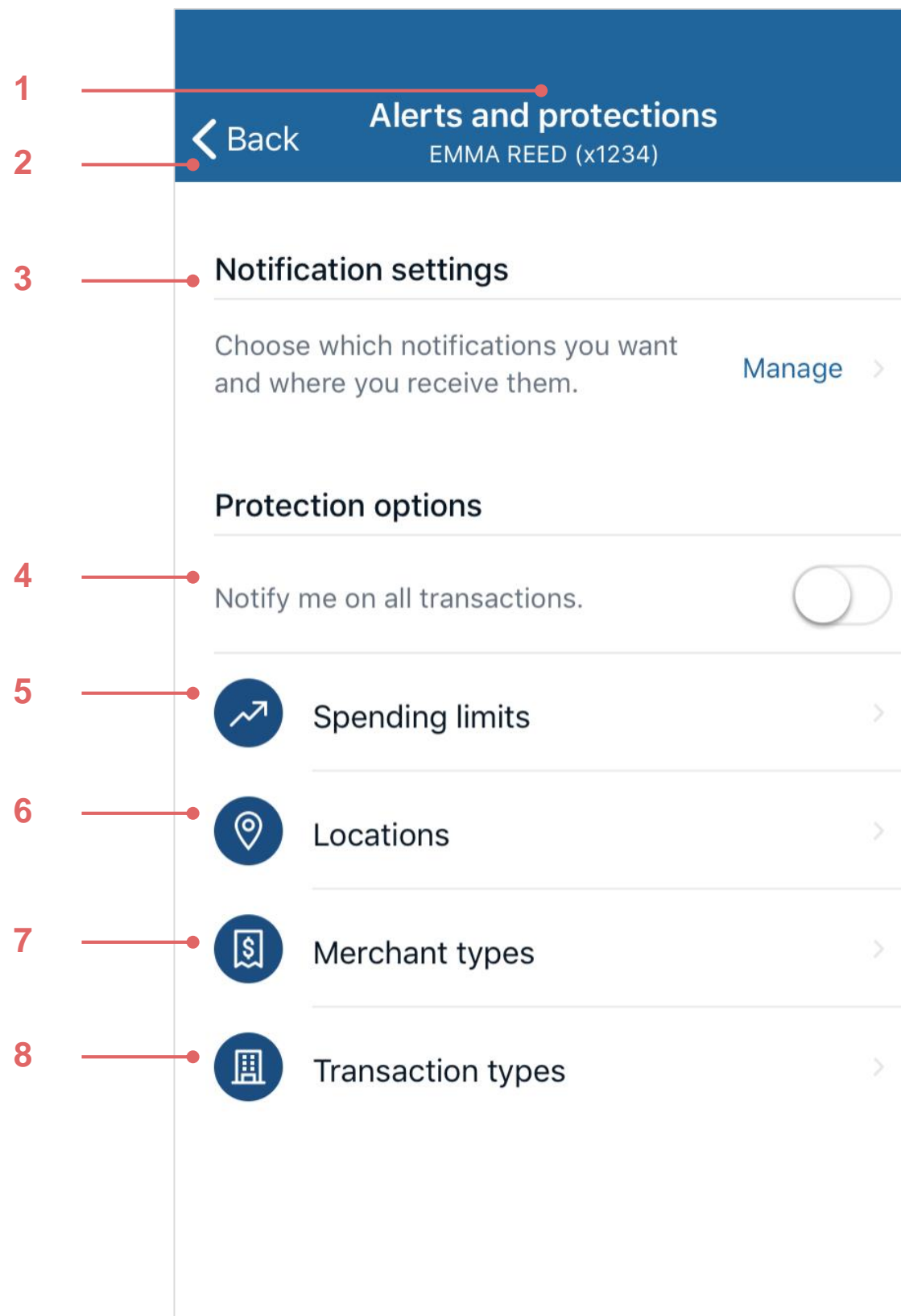


For credit cards, we hide the section that shows the abilities tied to our debit cards (Report lost/stolen, Re-order card, Activate new card).

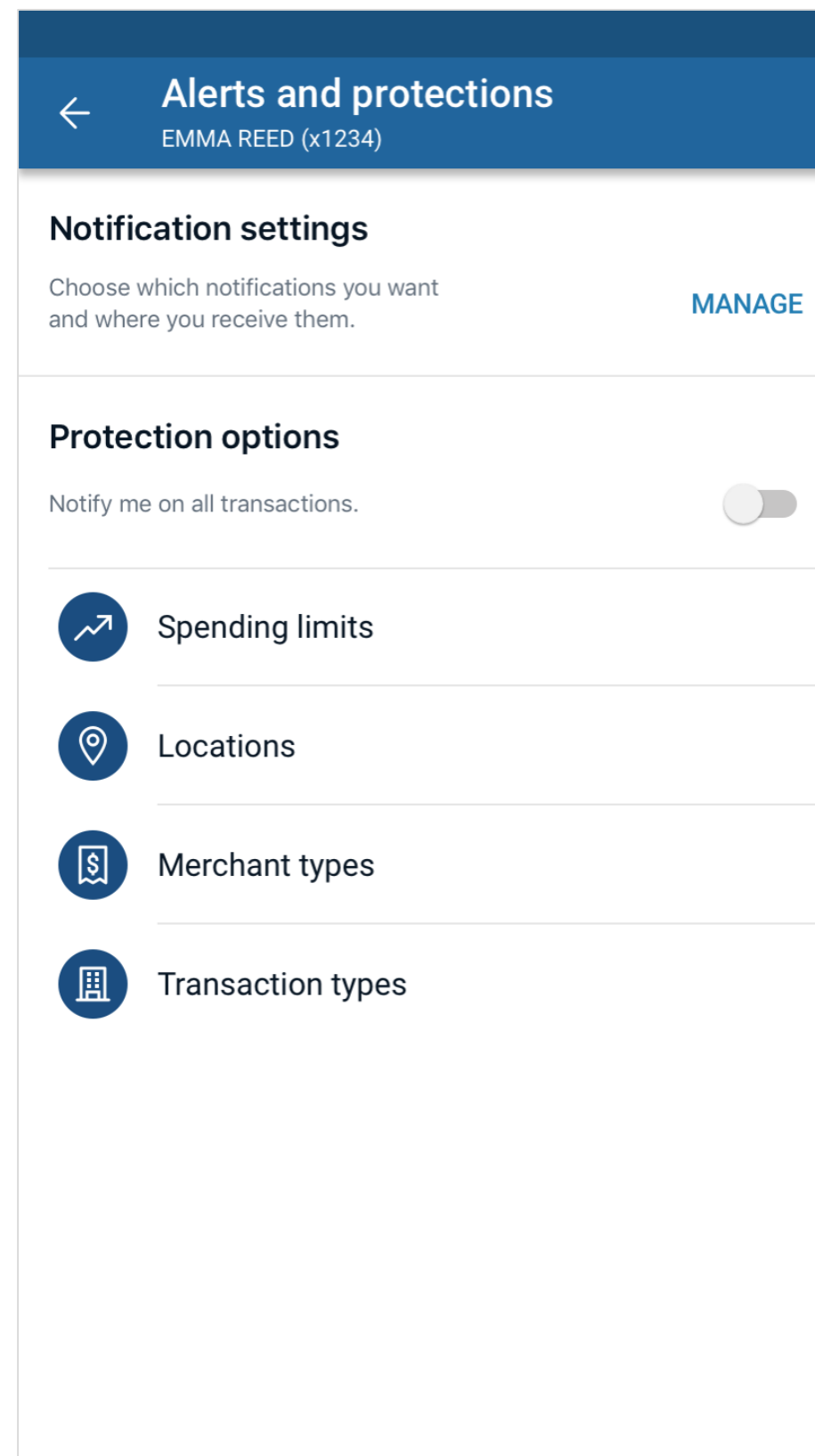
1. Alerts and protections

A new section was added after the action list in the *Card management* view. Tapping this cell takes you to the *Alerts and protections* view.

Alerts and protection



iOS®



Android™

1. Alerts and protections

A stacked header showing Alerts and protections as the title and including the card holder name and last four of the card number in parenthesis.

2. Back

Takes you back to the *Card management* screen.

3. Notification settings

Tapping the **Manage** link takes you to the *Notification settings* list of controls.

4. Notify me on all transactions

Toggle is turned OFF by default.

5. Locations

Tapping this cell takes you to the *Locations* list of controls.

6. Merchant types

Tapping this cell takes you to the *Merchant Types* list of controls. If there aren't any controls to notify, we'll deactivate this selection.

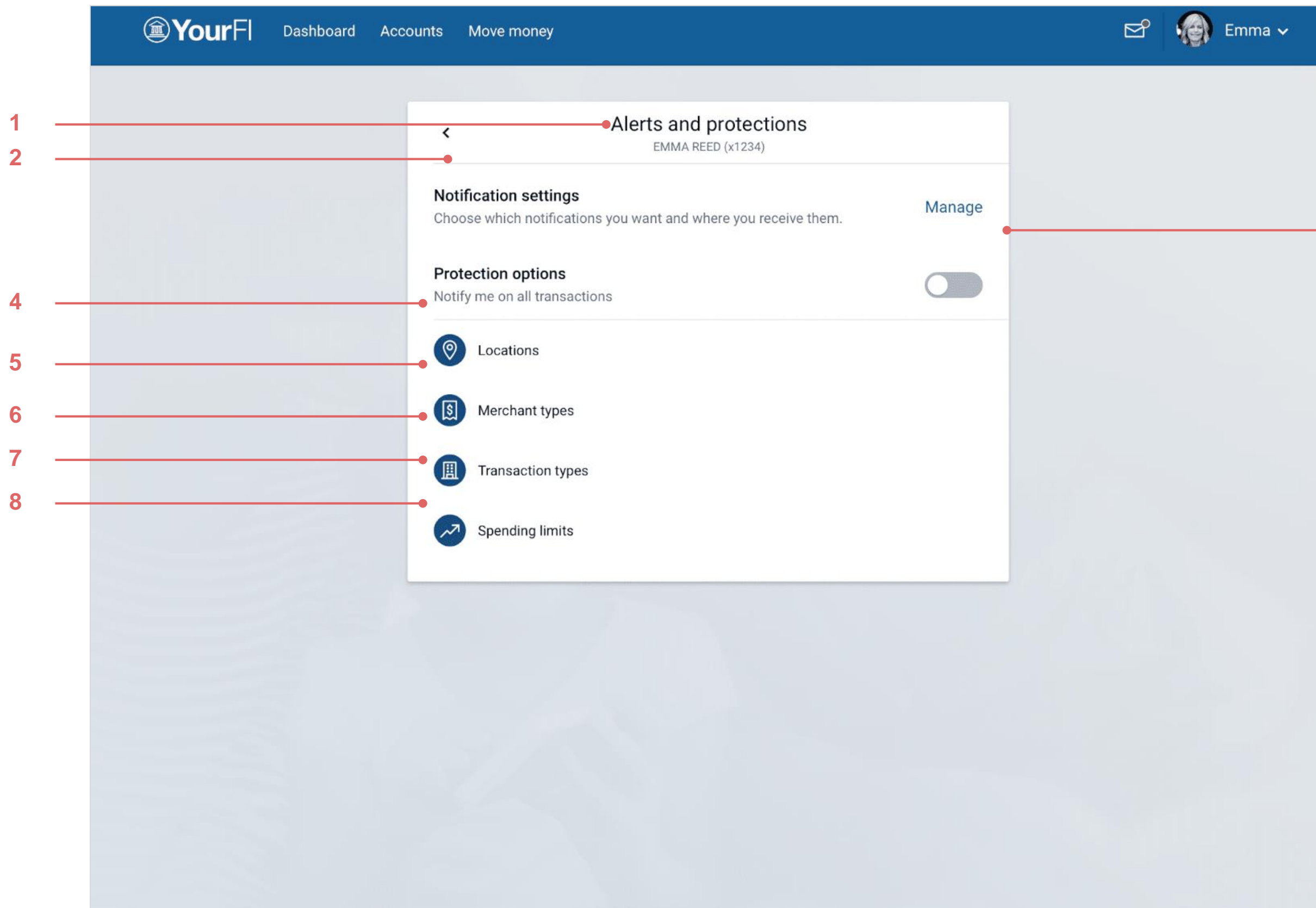
7. Transaction types

Tapping this cell takes you to the *Transaction Types* list of controls. If there aren't any controls to modify, we'll deactivate this selection.

8. Spending limits

Tapping this cell takes you to the *Spending Limits* controls. If there aren't any controls to modify, we'll deactivate this selection.

Online: Alerts and protection



1. Alerts and protection

A stacked header showing Alerts and protection as the title and including the card holder name and last four of the card number in parenthesis.

2. Back

Takes you back to the *Card management* screen.

3. Notification settings

Tapping the **Manage** link takes you to the *Notification settings* list of controls.

4. Notify me on all transactions

Toggle is turned OFF by default.

5. Locations

Tapping this cell takes you to the *Locations* list of controls.

6. Merchant types

Tapping this cell takes you to the *Merchant Types* list of controls. If there aren't any controls to modify, this selection is deactivated.

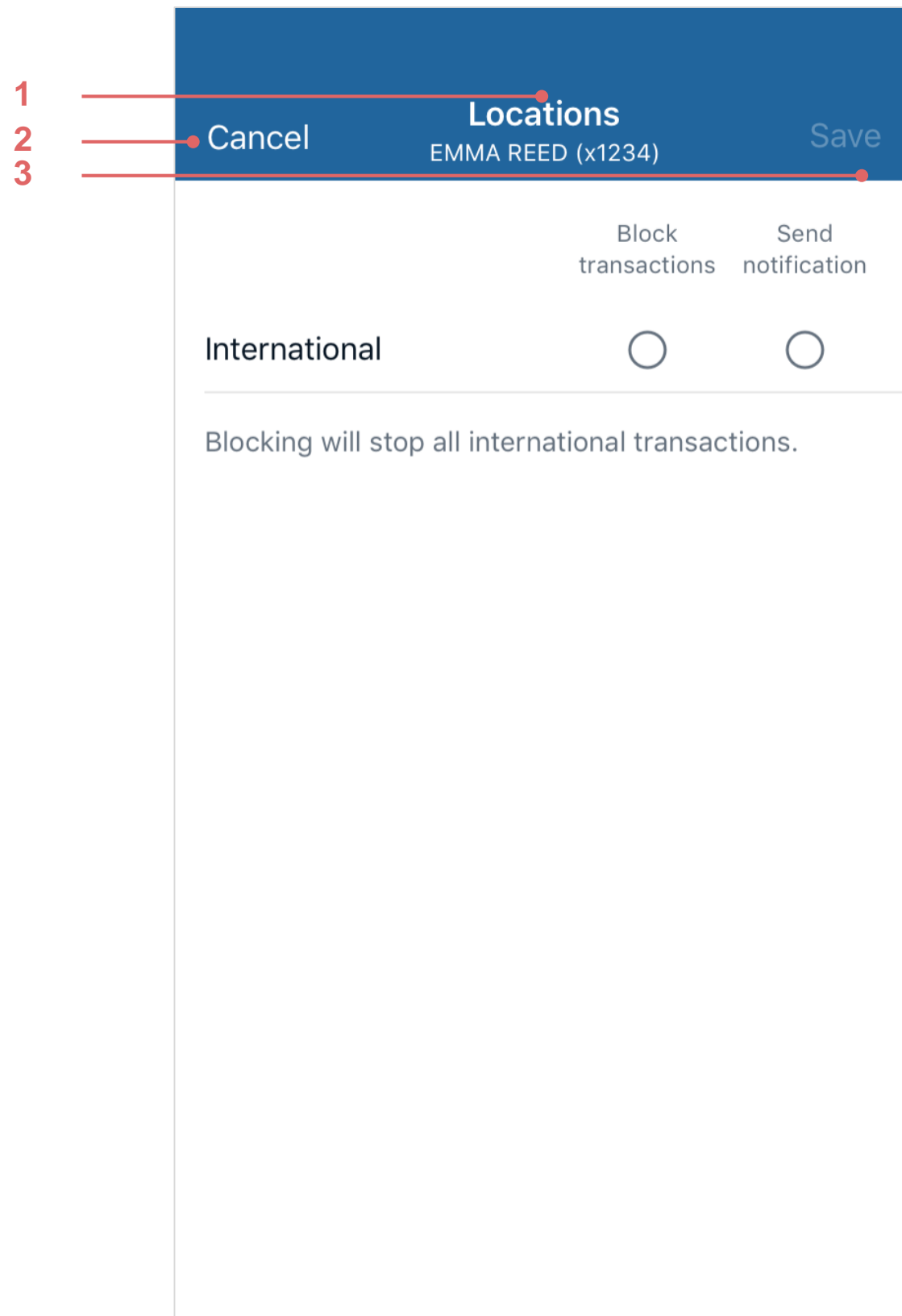
7. Transaction types

Tapping this cell takes you to the *Transaction Types* list of controls. If there aren't any controls to modify, this selection is deactivated.

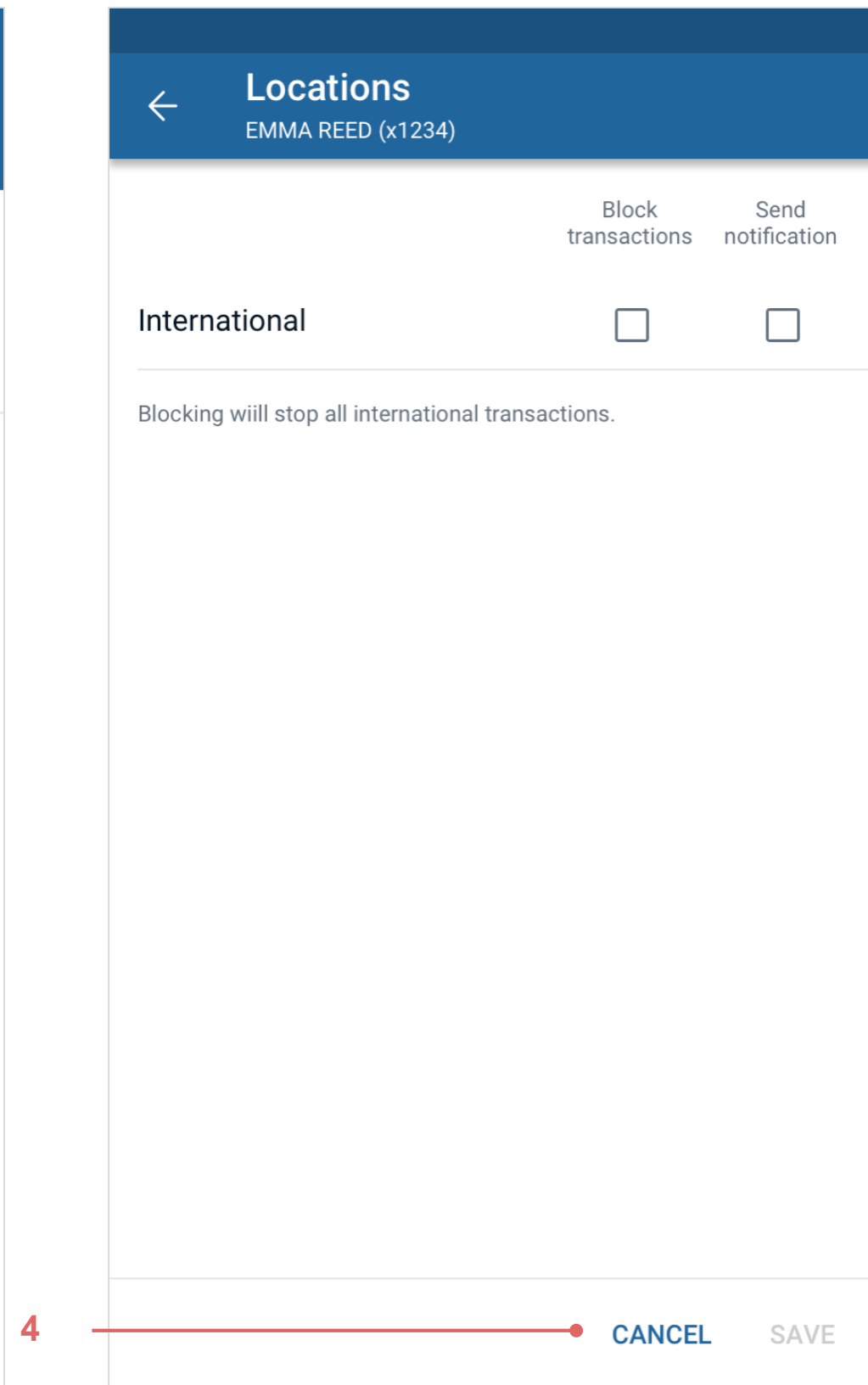
8. Spending limits

Tapping this cell takes you to the *Spending Limits* controls. If there aren't any controls to modify, this selection is deactivated.

Locations



iOS®



Android™

1. Locations

A stacked header showing `Locations` as the title and including the card holder name and last four of the card number in parenthesis.

2. Cancel (iOS®), Back (Android™)

Takes you back to the *Card alerts and protection* screen.

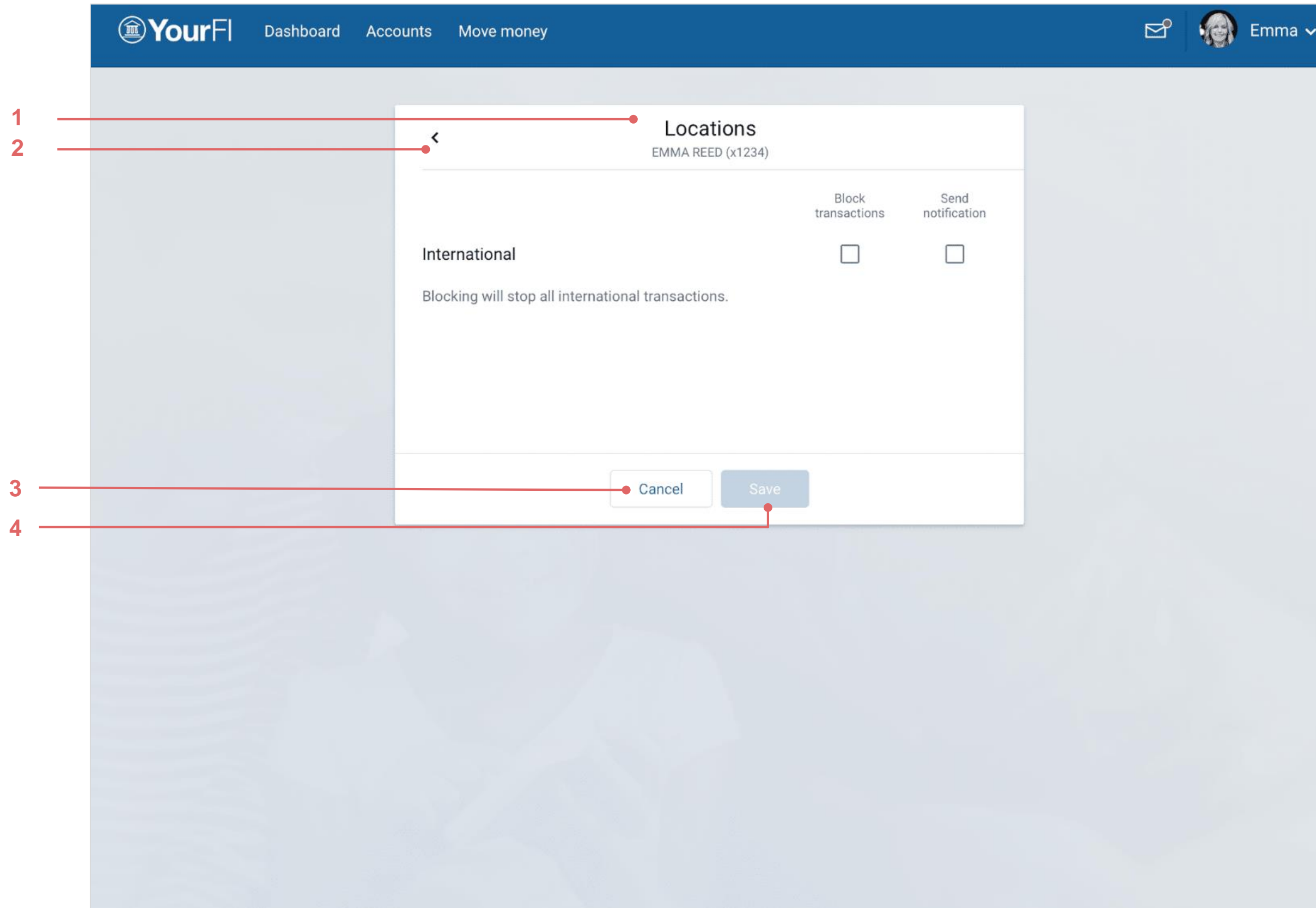
3. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

4. Cancel (Android™)

Takes you back to the *Card alerts and protection* screen.

Online: Locations



1. Locations

A stacked header showing `Locations` as the title and including the card holder name and last four of the card number in parenthesis.

2. Back

Takes you back to the *Card alerts and protection* screen.

3. Cancel

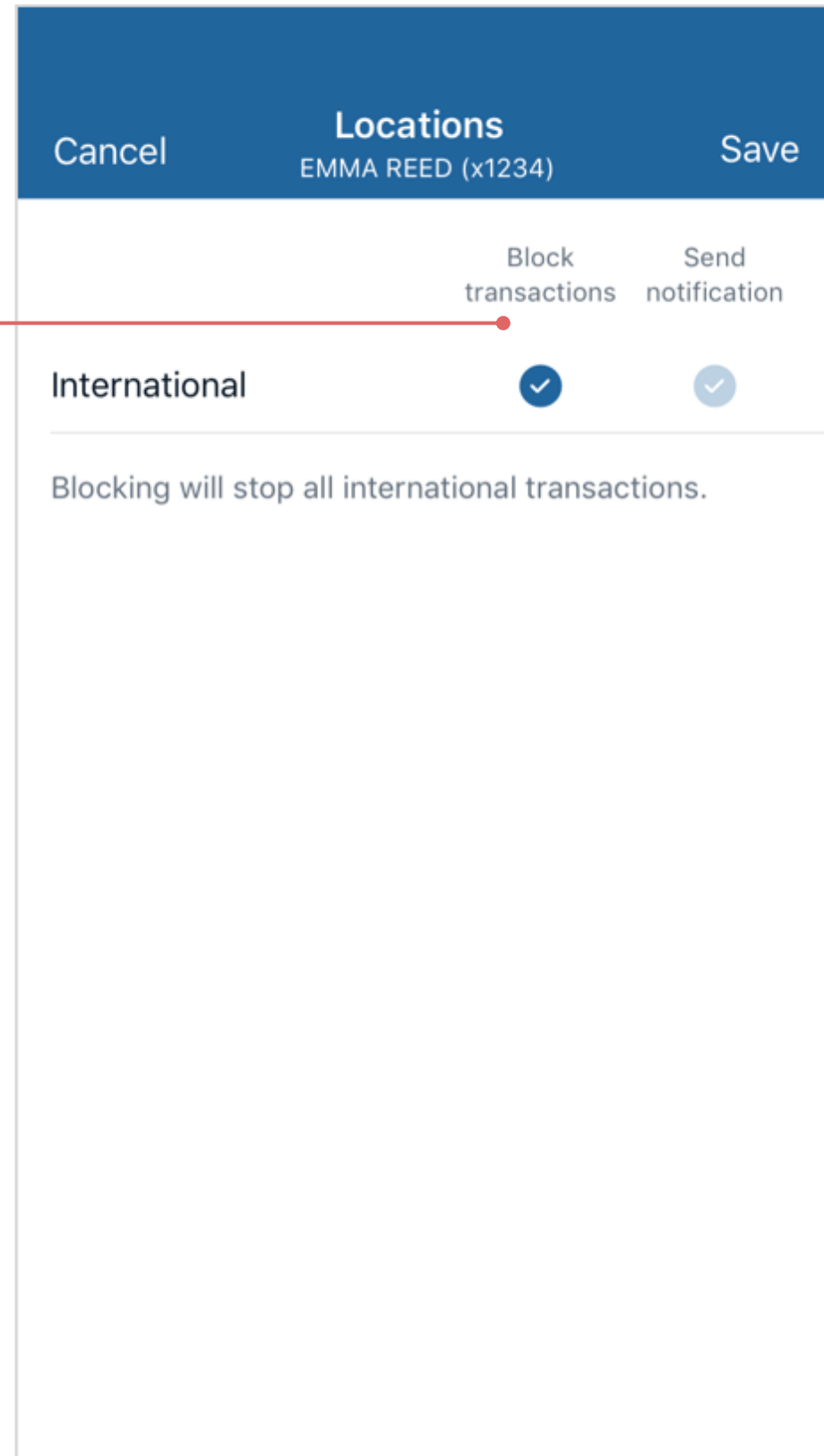
Takes you back to the *Card alerts and protection* screen.

4. Save

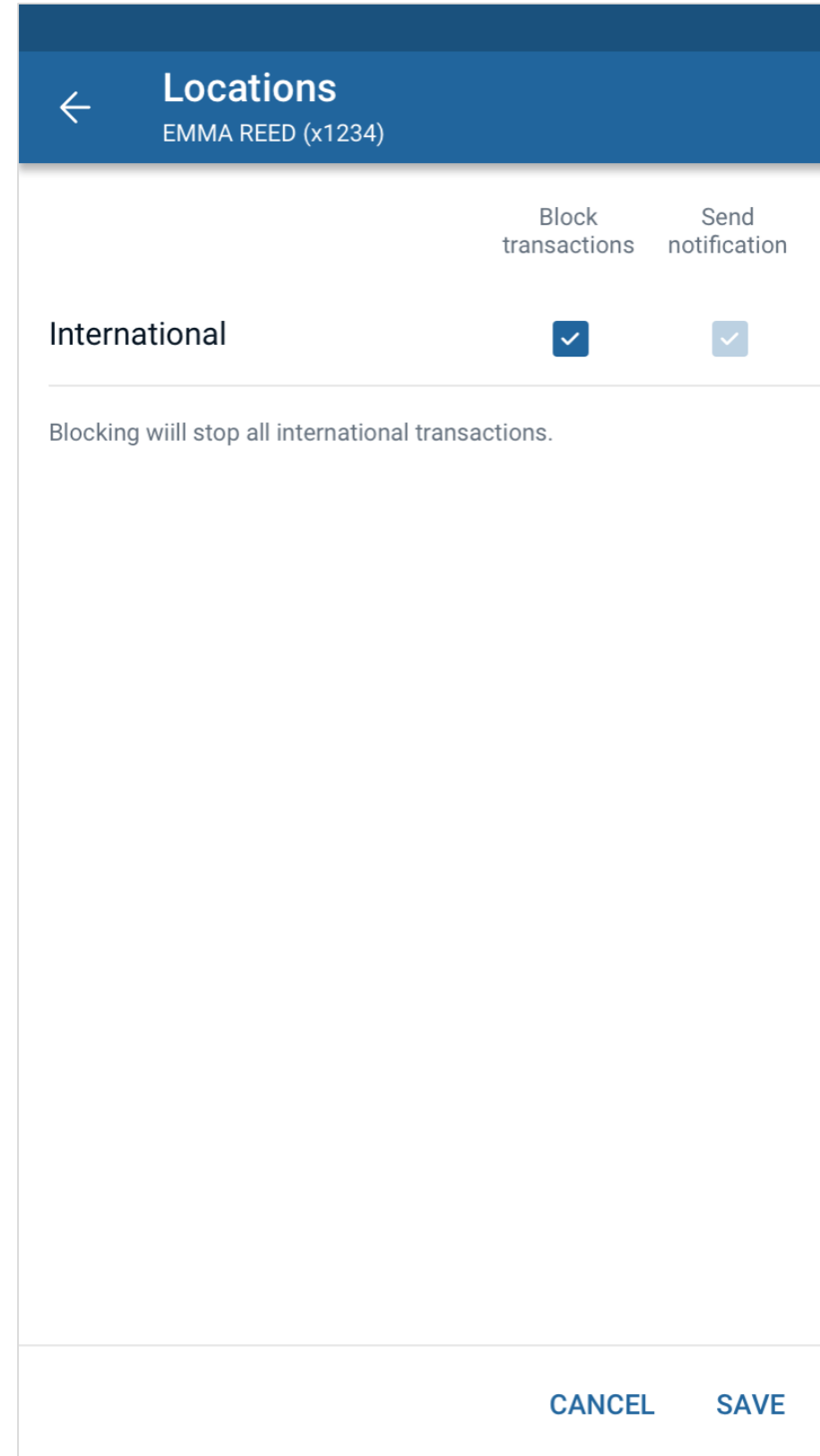
Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

Locations - Customized

1



iOS®

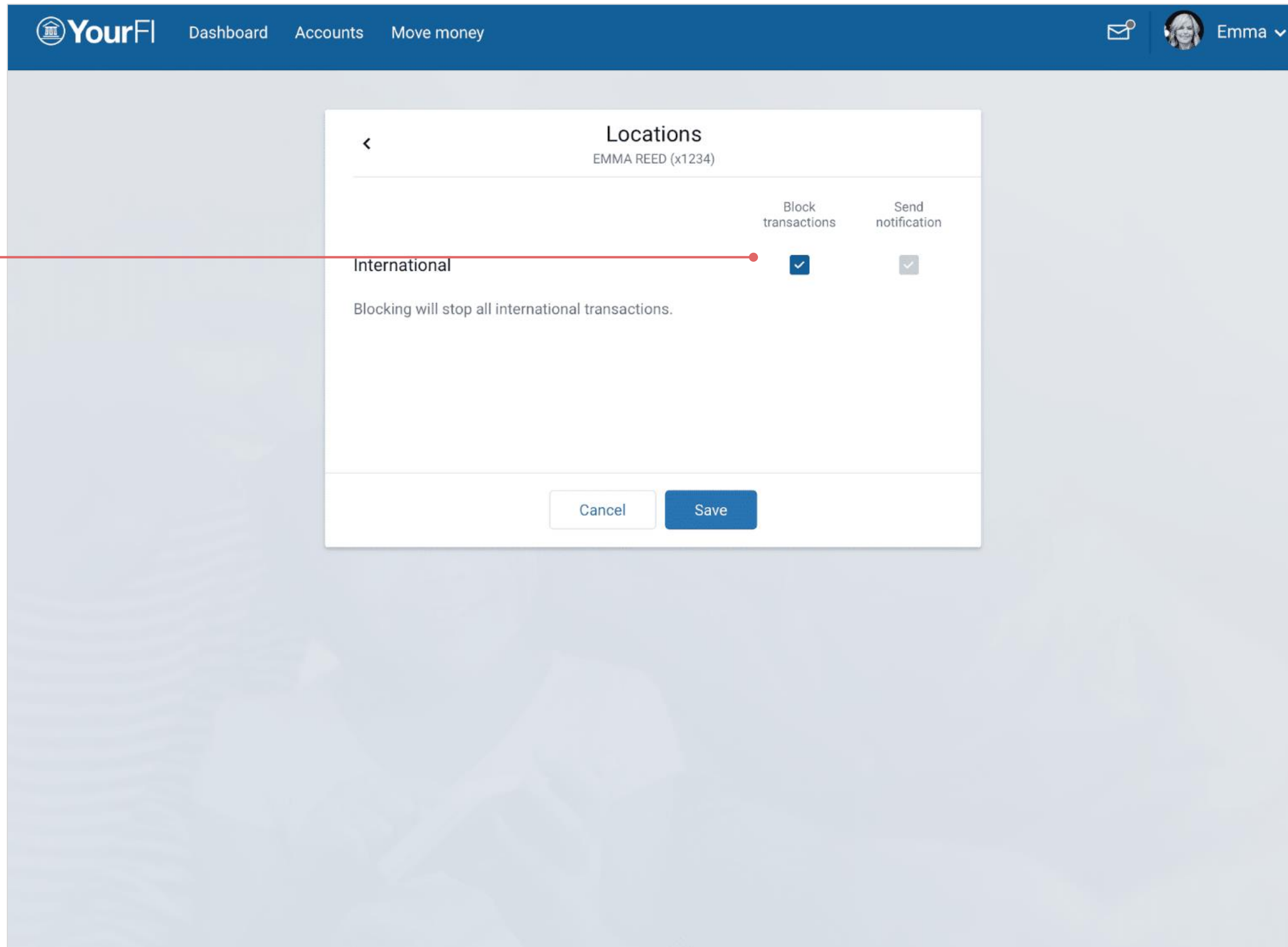


Android™

1. Customized toggles

If Blocked transactions is selected by the end user, the Send notification toggle is automatically checked and deactivated.

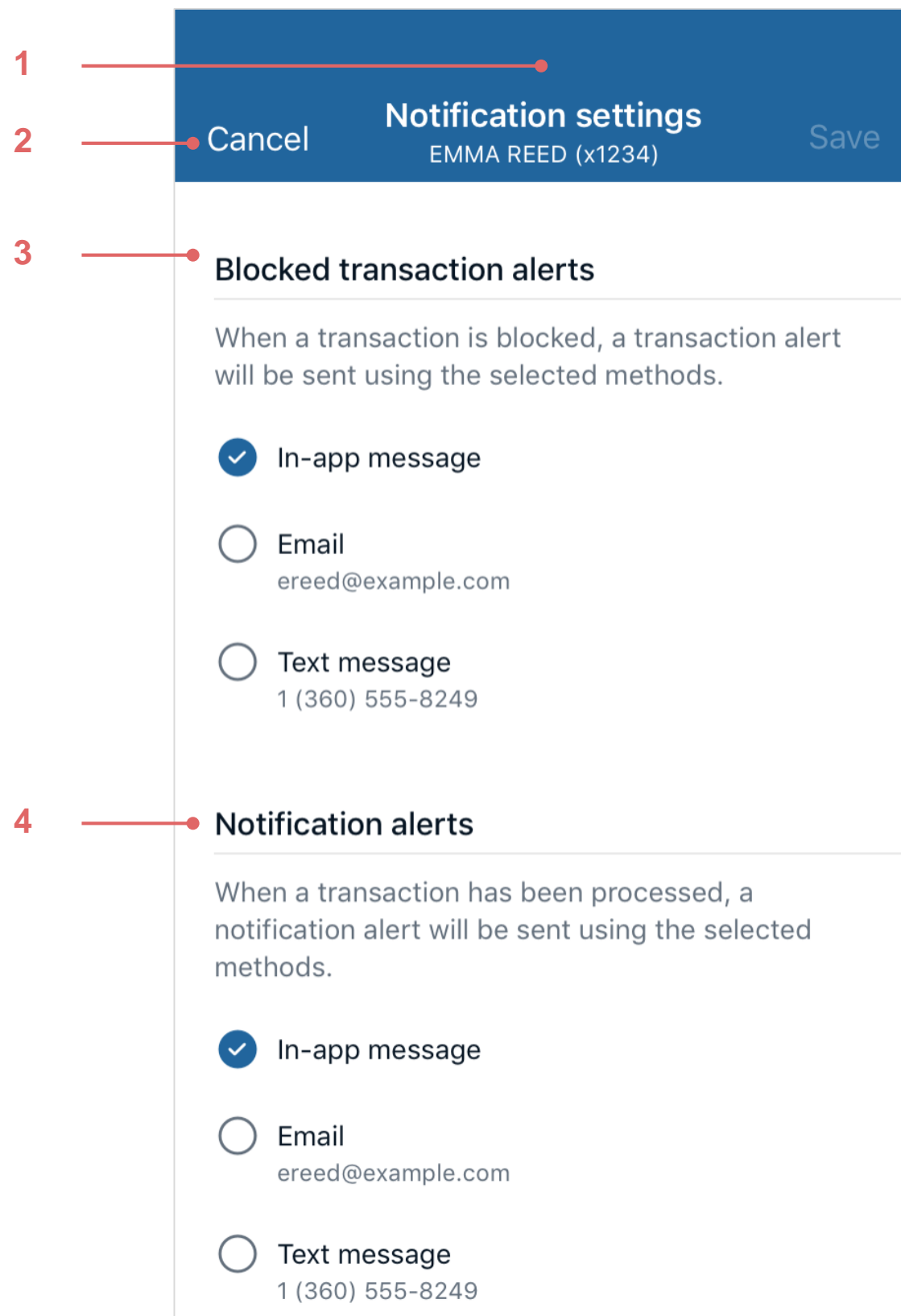
Locations - Customized



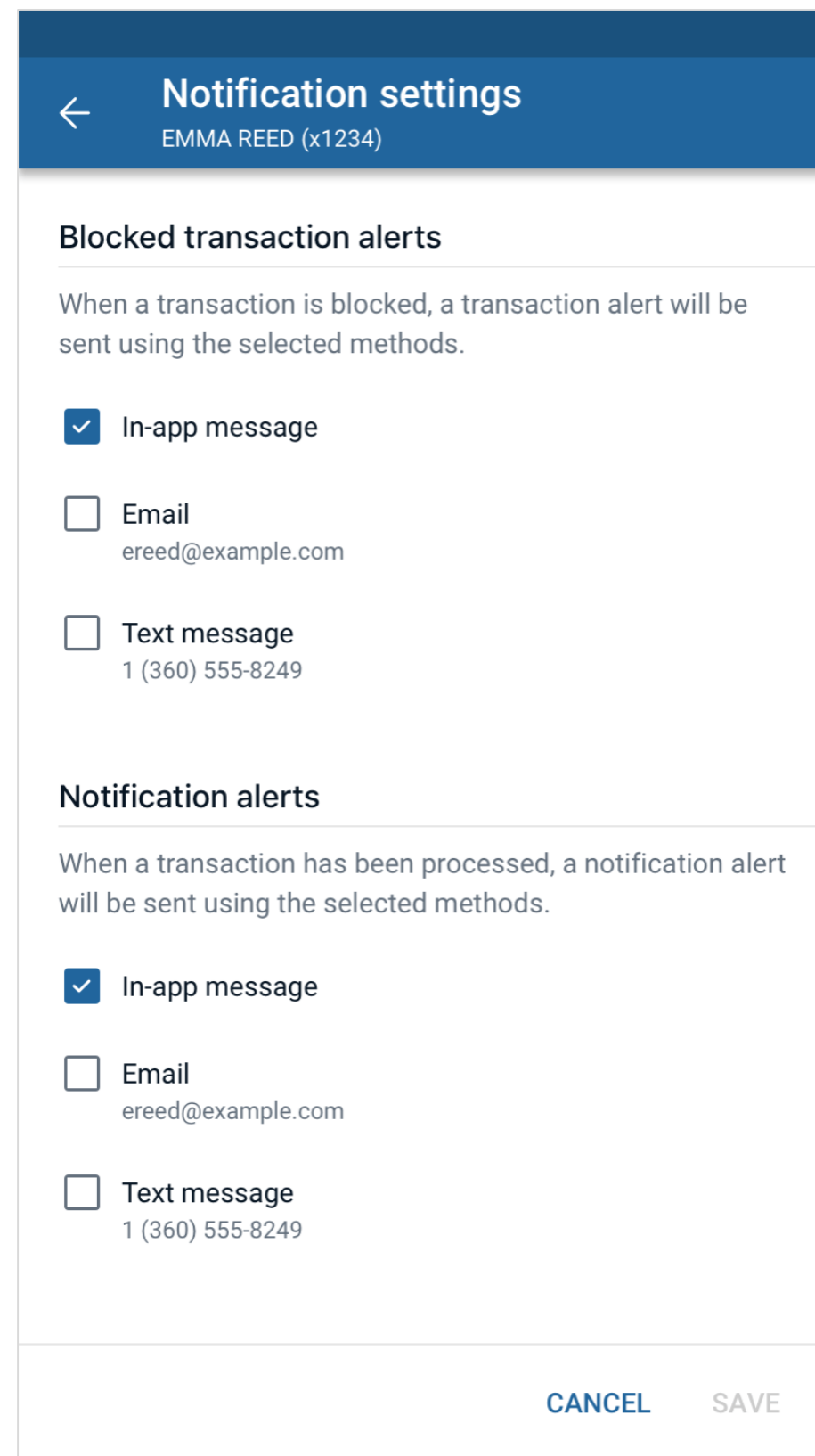
1. Customized toggles

If Blocked transactions is selected by the end user, the Send notification toggle is automatically checked and deactivated.

Notification settings



iOS®



Android™

1. Notification settings

A stacked header showing `Notification settings` as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Cancel (iOS®), Back (Android™)

Takes you back to the *Alerts and protection* screen.

If an end user has interacted with the toggles and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

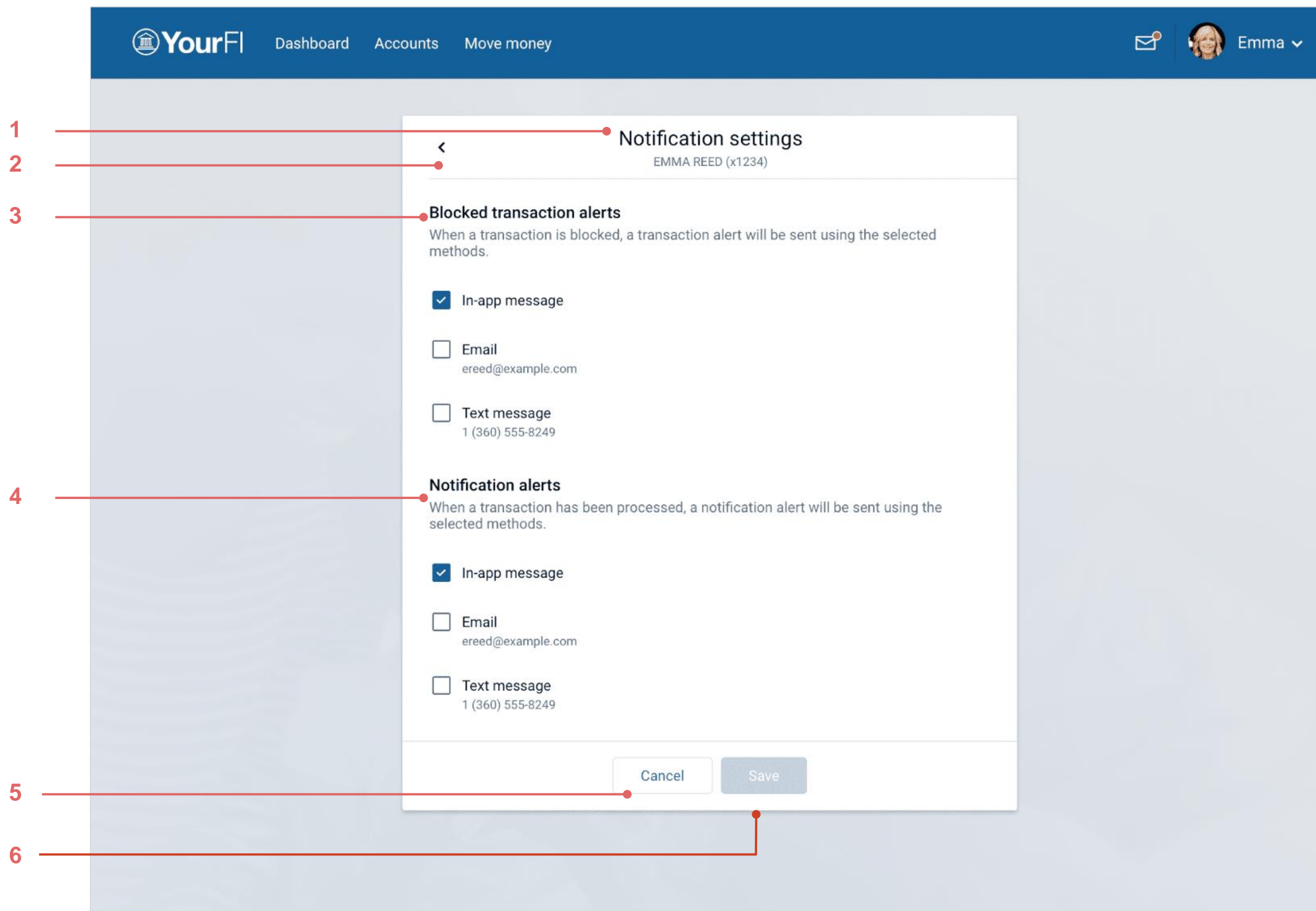
3. Blocked transaction alerts

The `In-app message` value is selected by default for blocked transaction alerts. If changes are made, the end user cannot proceed to another screen without selecting at least one item from this list.

4. Notification alerts

The `In-app message` value is selected by default for notification alerts. If changes are made, the end user cannot proceed to another screen without selecting at least one item from this list.

Notification settings



1. Notification settings

A stacked header showing Notification settings as the title, and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Back

Takes you back to the *Alerts and protection* screen.

If an end user has interacted with the toggles and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Blocked transaction alerts

The **In-app message** is selected by default for blocked transaction alerts. If changes are made, the end user cannot proceed to another screen without selecting at least one item from this list.

4. Notification alerts

The **In-app message** value is selected by default for notification alerts. If changes are made, the end user cannot proceed to another screen without selecting at least one item from this list.

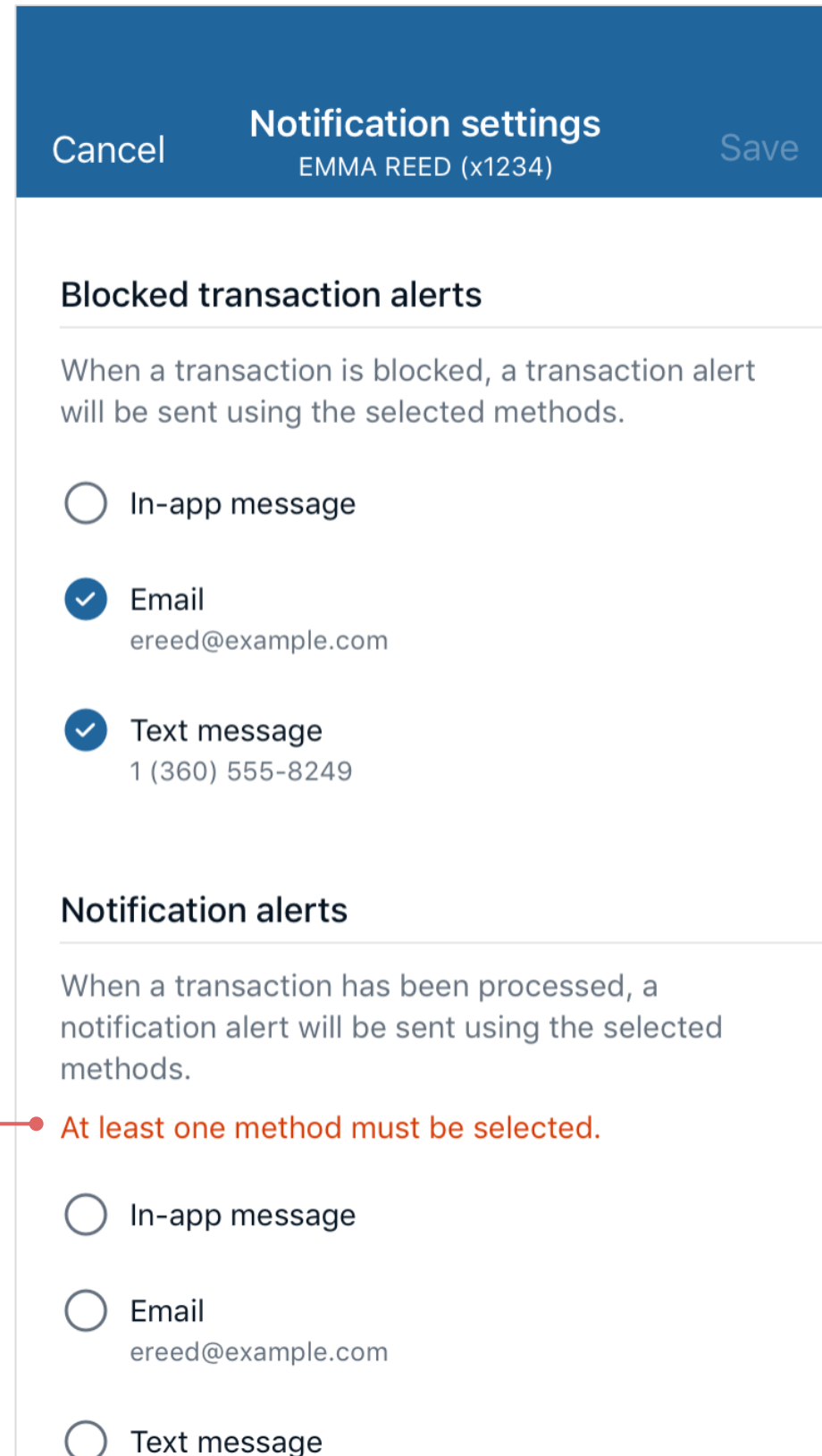
5. Cancel

Takes you back to the *Alerts and projection* screen.

6. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button will change to active state.

Notification settings



Notification settings
EMMA REED (x1234)

Cancel Save

Blocked transaction alerts

When a transaction is blocked, a transaction alert will be sent using the selected methods.

- In-app message
- Email
ereed@example.com
- Text message
1 (360) 555-8249

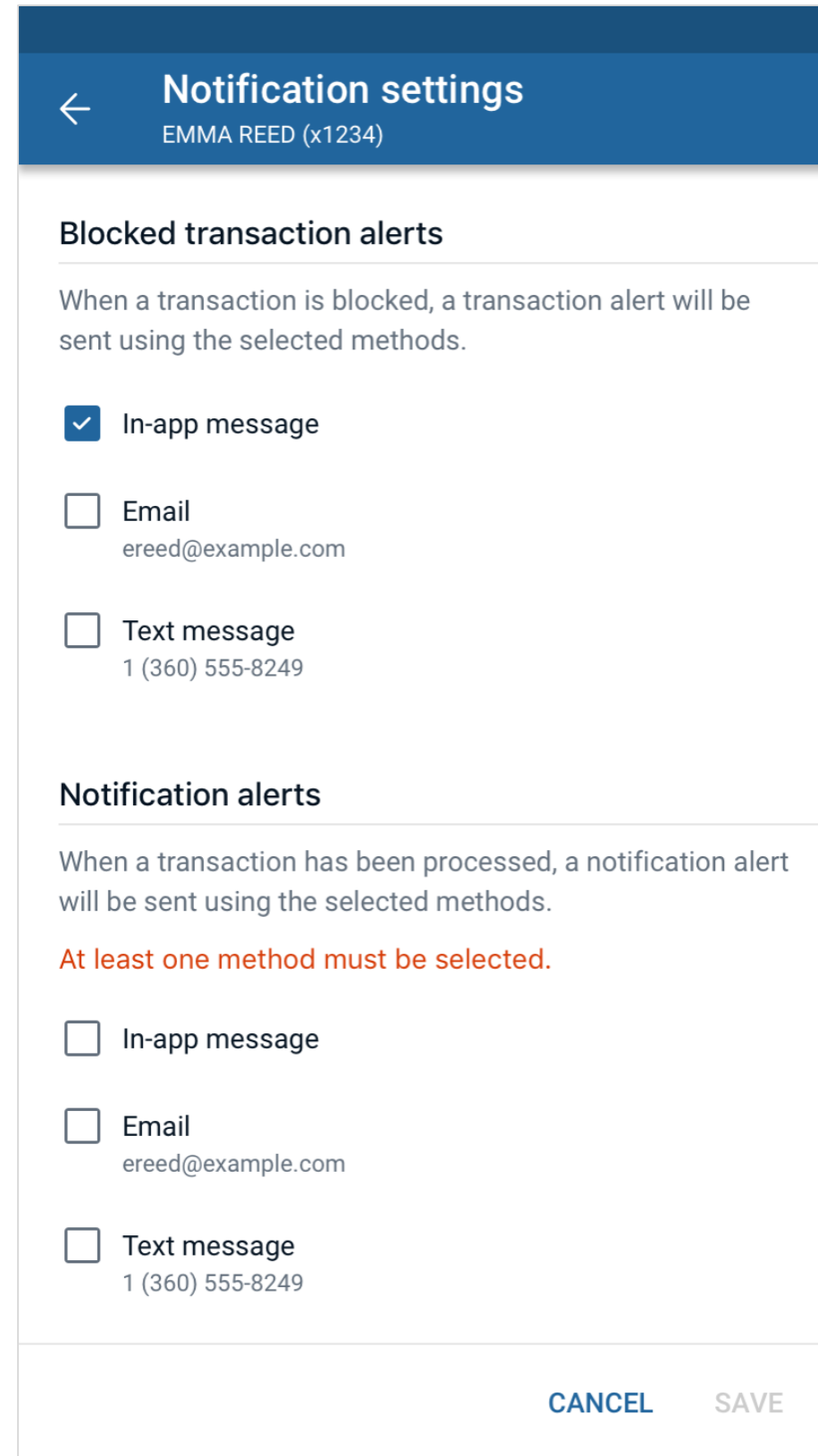
Notification alerts

When a transaction has been processed, a notification alert will be sent using the selected methods.

1 **At least one method must be selected.**

- In-app message
- Email
ereed@example.com
- Text message

iOS®



Notification settings
EMMA REED (x1234)

Blocked transaction alerts

When a transaction is blocked, a transaction alert will be sent using the selected methods.

- In-app message
- Email
ereed@example.com
- Text message
1 (360) 555-8249

Notification alerts

When a transaction has been processed, a notification alert will be sent using the selected methods.

At least one method must be selected.

- In-app message
- Email
ereed@example.com
- Text message
1 (360) 555-8249

CANCEL SAVE

Android™

1. Notification settings error

If the end user deselects all delivery methods in a section, an alert message appears stating **At least one method must be selected**. The **Save** button is disabled.

Notification settings

YourFI Dashboard Accounts Move money Emma

Notification settings

EMMA REED (x1234)

Blocked transaction alerts
When a transaction is blocked, a transaction alert will be sent using the selected methods.

- In-app message
- Email
ereed@example.com
- Text message
1 (360) 555-8249

Notification alerts
When a transaction has been processed, a notification alert will be sent using the selected methods.

4 ● At least one method must be selected.

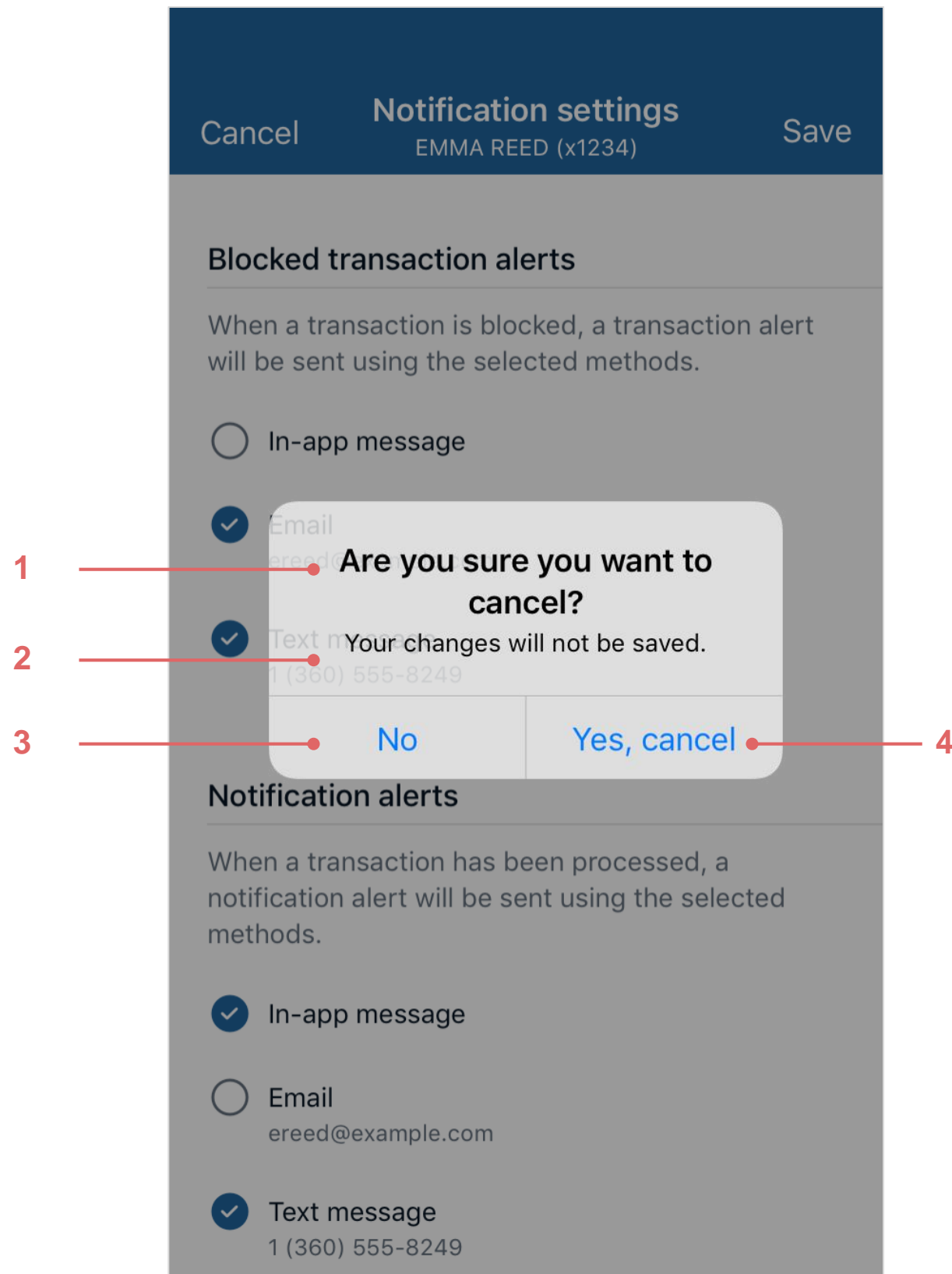
- In-app message
- Email
ereed@example.com
- Text message
1 (360) 555-8249

Cancel Save

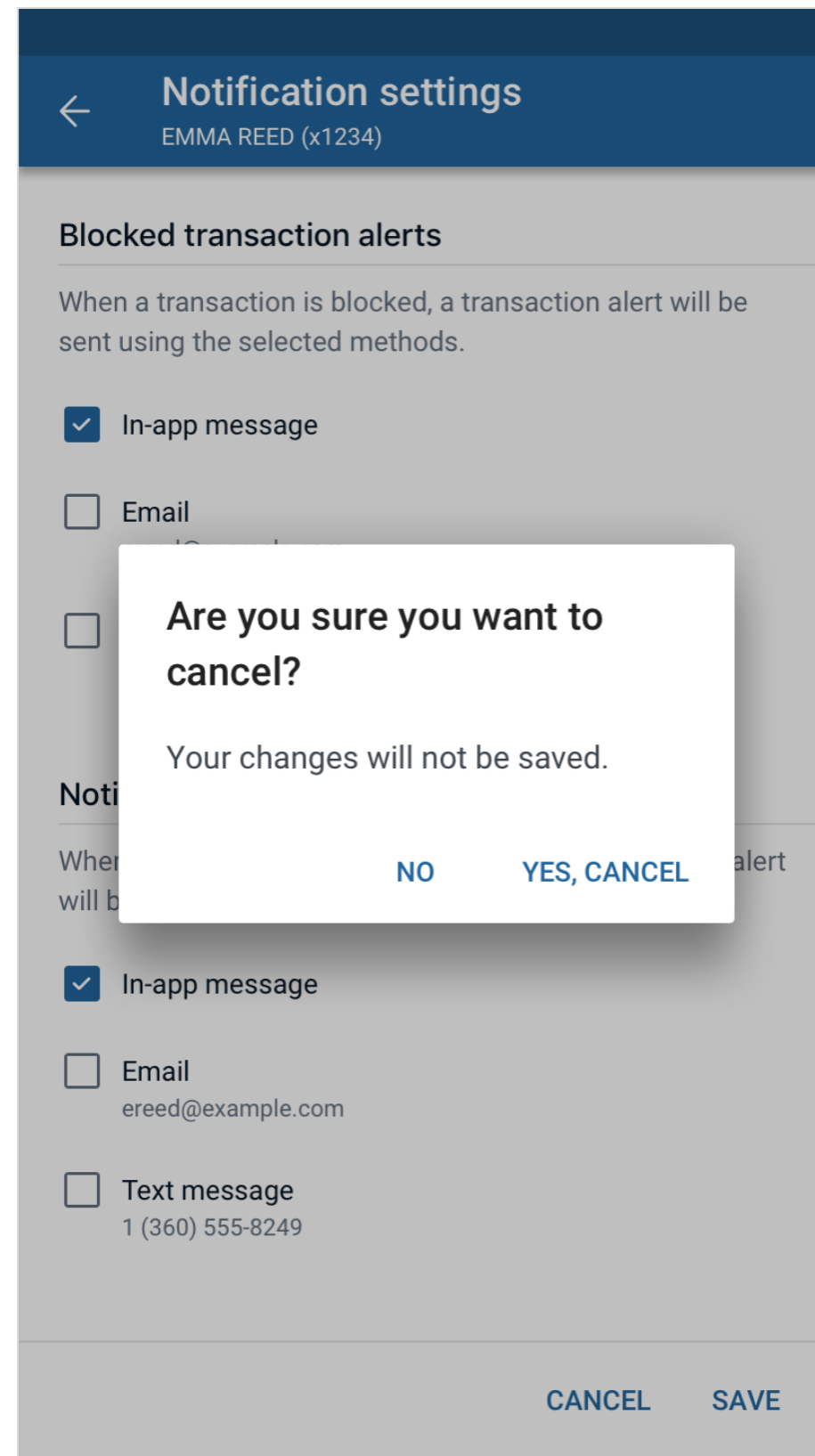
1. Notification settings error

If the end user deselects all delivery methods in a section, an alert message is displayed stating At least one method must be selected. The Save button is disabled.

Are you sure you want to cancel dialog



iOS®



Android™

1. Title

Are you sure you want to cancel?

2. Secondary text

Your changes will not be saved.

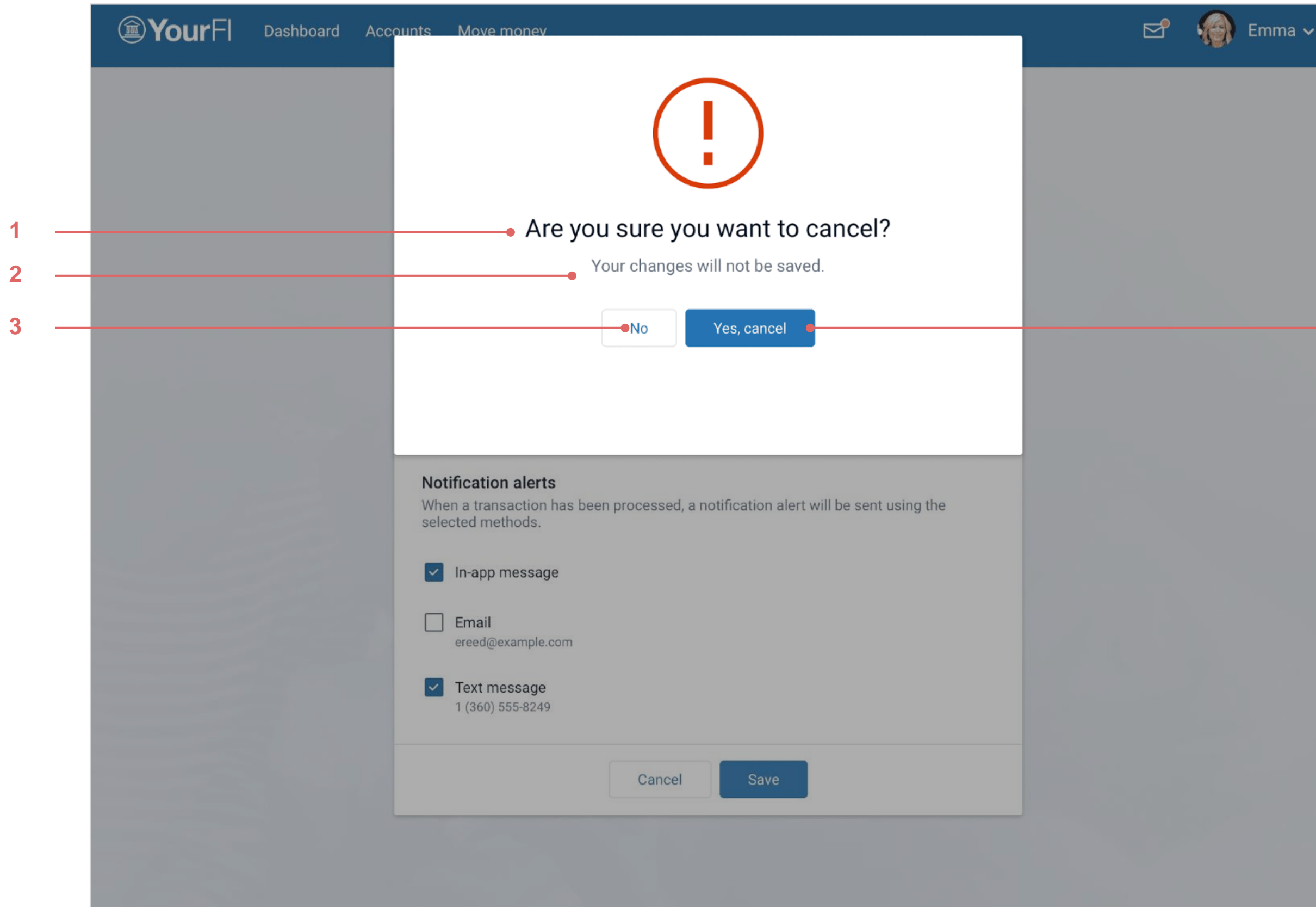
3. No button

Dismisses dialog.

4. Yes, cancel button

Dismisses dialog and dismisses any changes/updates that were made. Takes the end user back to the *Card alerts and protections* screen.

Are you sure you want to cancel dialog



1. Title

Are you sure you want to cancel?

2. Secondary text

Your changes will not be saved.

3. No button

Dismisses dialog.

4. Yes button

Dismisses dialog and dismisses any changes/updates that were made. Takes the end user back to the *Alerts and protections* screen.

Merchant types

1 Merchant types

2 Cancel

3 Save

4 Block transactions Send notification

	Block transactions	Send notification
Age restricted	<input type="radio"/>	<input type="radio"/>
Department store	<input type="radio"/>	<input type="radio"/>
Entertainment	<input type="radio"/>	<input type="radio"/>
Gas station	<input type="radio"/>	<input type="radio"/>
Grocery	<input type="radio"/>	<input type="radio"/>
Household	<input type="radio"/>	<input type="radio"/>
Personal care	<input type="radio"/>	<input type="radio"/>
Restaurant	<input type="radio"/>	<input type="radio"/>
Travel	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

5

6 *i* Merchant type details

iOS®

← Merchant types

EMMA REED (x1234)

	Block transactions	Send notification
Age restricted	<input type="checkbox"/>	<input type="checkbox"/>
Department store	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment	<input type="checkbox"/>	<input type="checkbox"/>
Gas station	<input type="checkbox"/>	<input type="checkbox"/>
Grocery	<input type="checkbox"/>	<input type="checkbox"/>
Household	<input type="checkbox"/>	<input type="checkbox"/>
Personal care	<input type="checkbox"/>	<input type="checkbox"/>
Restaurant	<input type="checkbox"/>	<input type="checkbox"/>
Travel	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

i Merchant type details

CANCEL SAVE

Android™

1. Merchant types

A stacked header showing Merchant types as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits OK with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Cancel (iOS® and Android™), Back (Android™)

Takes you back to the Card Protection screen. If an end user has interacted with the toggles and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the Save button changes to active state.

4. Block transactions and send notifications

When end users check a Block transactions box, they are blocking the specific merchant type. The Send notification box should also be checked and deactivated to send the end user an alert when a transaction is blocked. The end user can't deselect the send notification box in this scenario.

When end users check a Send notification box, they will be alerted when a transaction is processed for the specific merchant type listed to the left. End users can select send notifications only. By default, nothing should be checked.

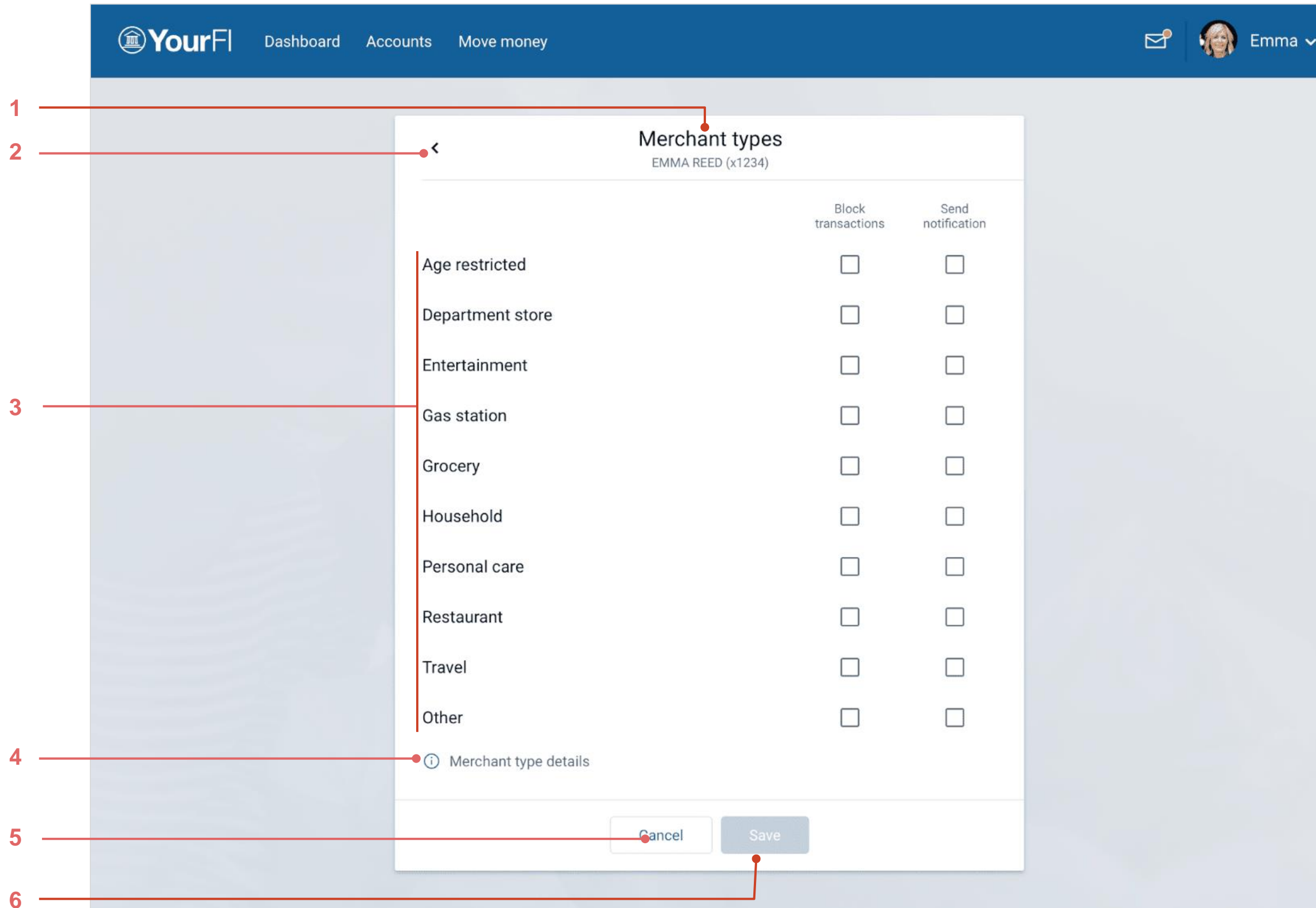
5. Full Merchant Types List

- Age restricted
- Department store
- Entertainment
- Gas station
- Grocery
- Household
- Personal care
- Restaurant
- Travel
- Other

6. Merchant type details

Pushes the end user to a new screen that displays all merchant type descriptions.

Merchant types



1. Merchant types header

A stacked header showing Merchant types as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Back button

Takes you back to the *Card protection* screen.

If an end user has interacted with the toggles and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Full Merchant Types List

The list of descriptions will be provided by our API from PSCU. They appear in alphabetical order.

- Age restricted
- Department store
- Entertainment
- Gas station
- Grocery
- Household
- Personal care
- Restaurant
- Travel
- Other

4. Merchant type details

Pushes the end user to a new screen that displays all merchant type descriptions.

5. Cancel button

Functions the same as the **Back** action.

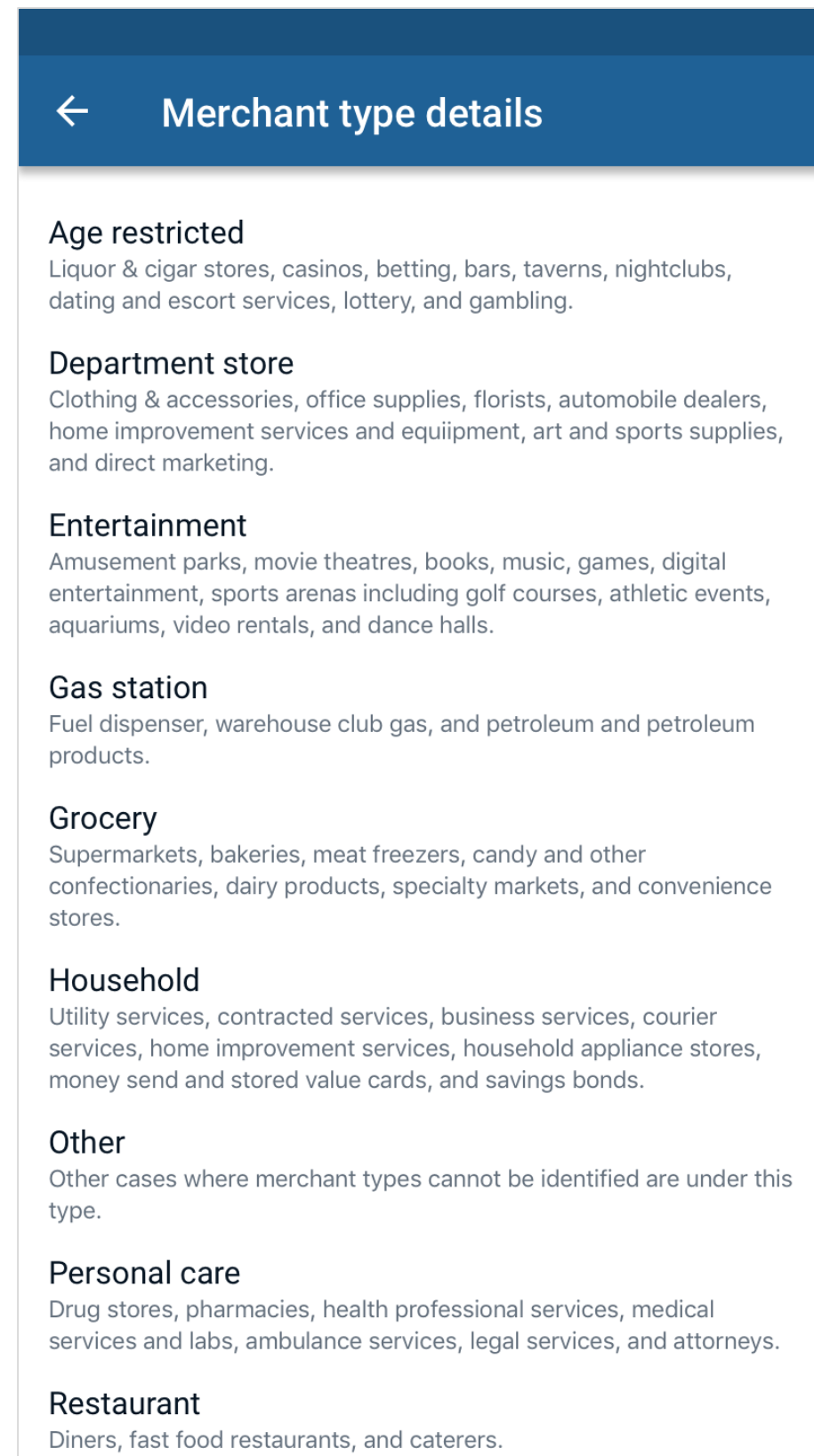
6. Save button

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state

Merchant type details



iOS®



Android™

1. Back

Takes you back to the *Merchant types* screen.

2. Merchant type descriptions

Merchant type details

1 — Close button (X) in the dialog header.

2 — 'Household' category description.

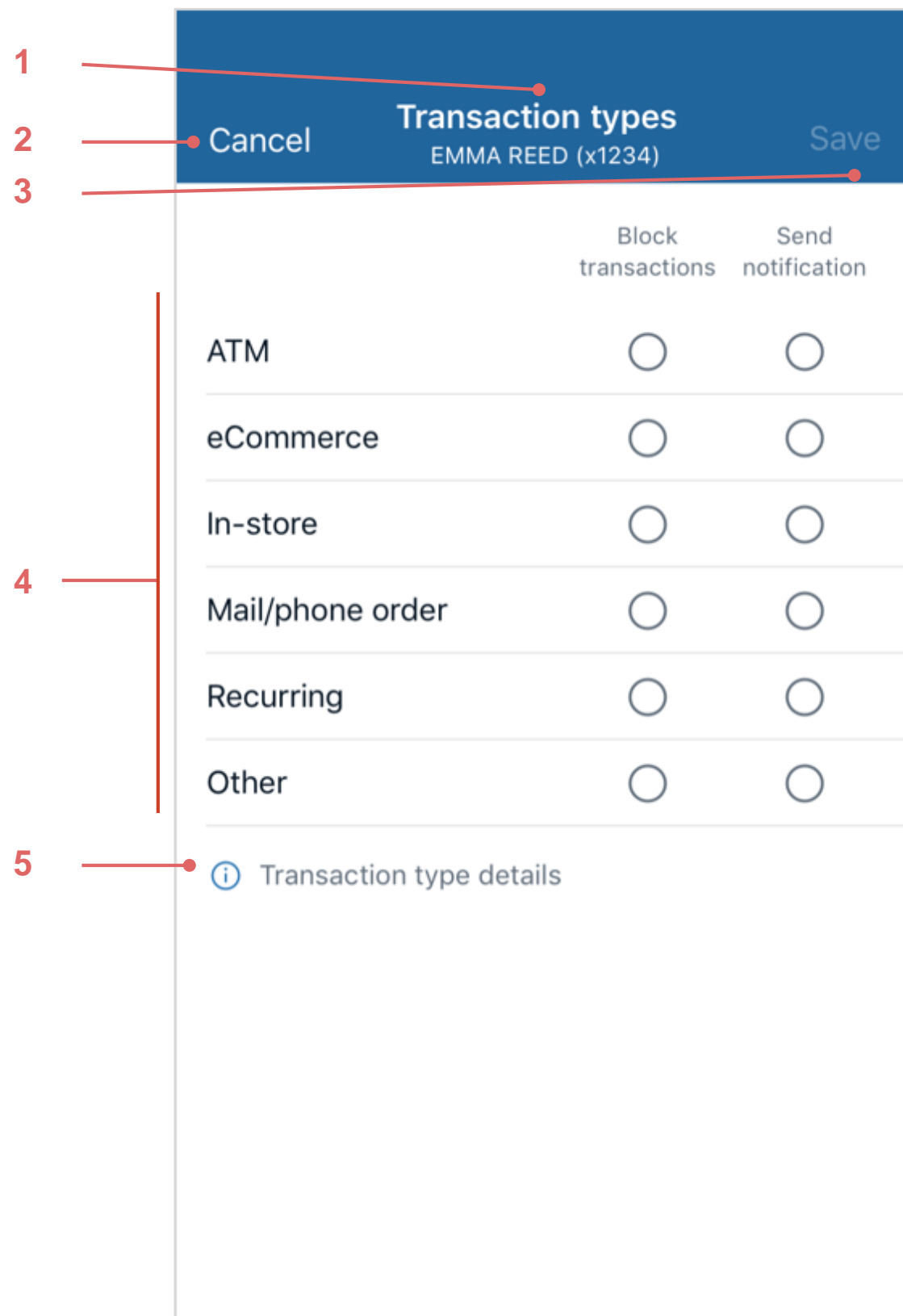
Merchant type details [X]

- Age restricted**
Liquor & cigar stores, casinos, betting, bars, taverns, nightclubs, dating and escort services, lottery, and gambling.
- Department store**
Clothing & accessories, office supplies, florists, automobile dealers, home improvement services and equipment, art and sports supplies, and direct marketing.
- Entertainment**
Amusement parks, movie theatres, books, music, games, digital entertainment, sports arenas including golf courses, athletic events, aquariums, video rentals, and dance halls.
- Gas station**
Fuel dispenser, warehouse club gas, and petroleum and petroleum products.
- Grocery**
Supermarkets, bakeries, meat freezers, candy and other confectionaries, dairy products, specialty markets, and convenience stores.
- Household**
Utility services, contracted services, business services, courier services, home improvement services, household appliance stores, money send and stored value cards, and savings bonds.
- Personal care**
Drug stores, pharmacies, health professional services, medical services and labs, ambulance services, legal services, and attorneys.
- Restaurant**
Diners, fast food restaurants, and caterers.
- Travel**
Airlines, cars and automotive rentals, hotels, motels, inns, resorts, toll and bridge fees, taxicabs and limousines, timeshares, parking lots, and garages.
- Other**
Other cases where merchant types cannot be identified are under this type.

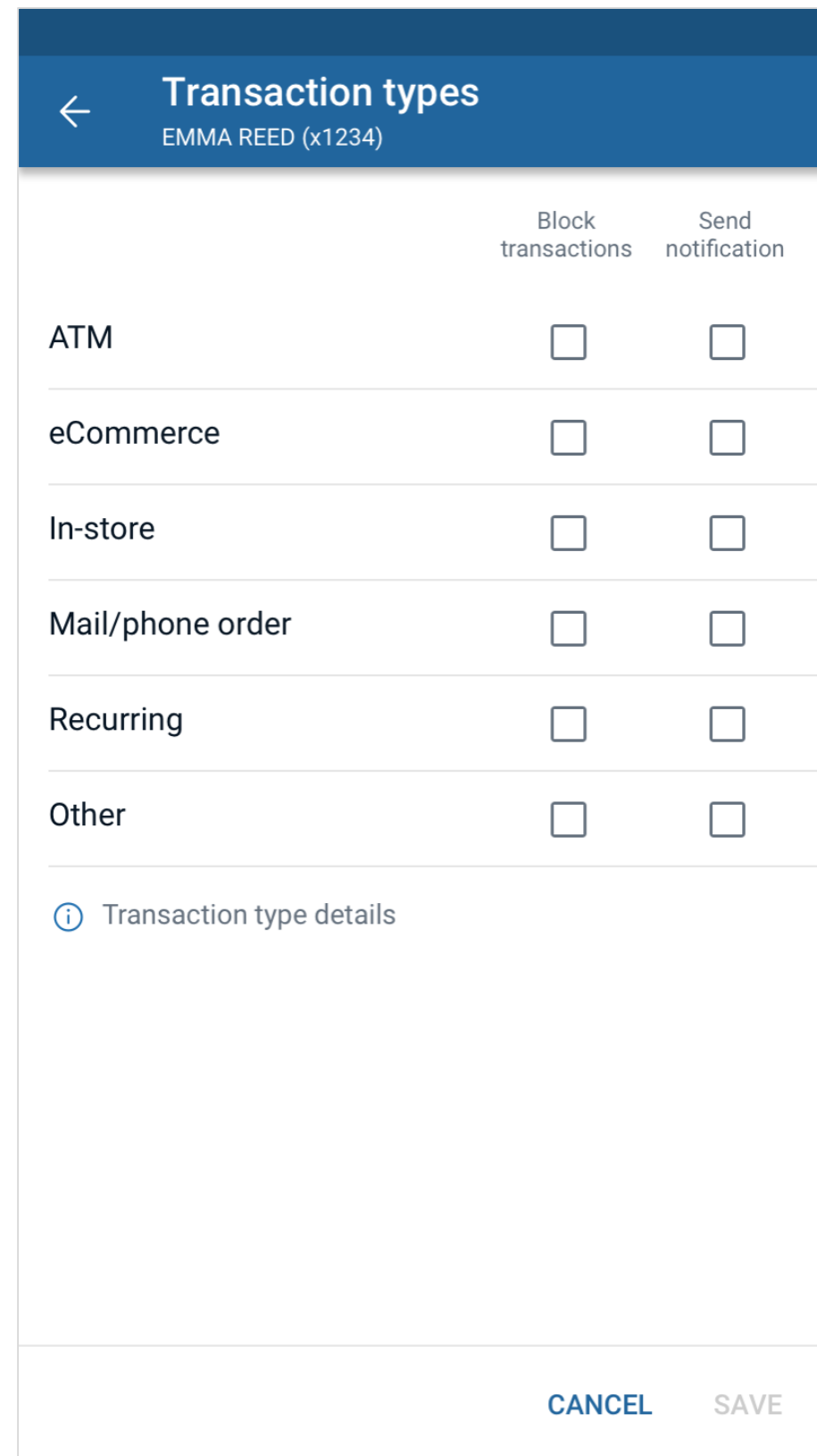
1. Close
Dismisses dialog.

2. Merchant type details

Transaction types



iOS®



Android™

1. Transaction types

A stacked header showing `Transaction types` as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, we'll refresh this view to reflect the changes that were successfully set.

2. Cancel (iOS®), Back (Android™)

Takes you back to the *Card protection* screen.

If an end user has interacted with the toggle and not saved their action, triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

4. Full transaction types list

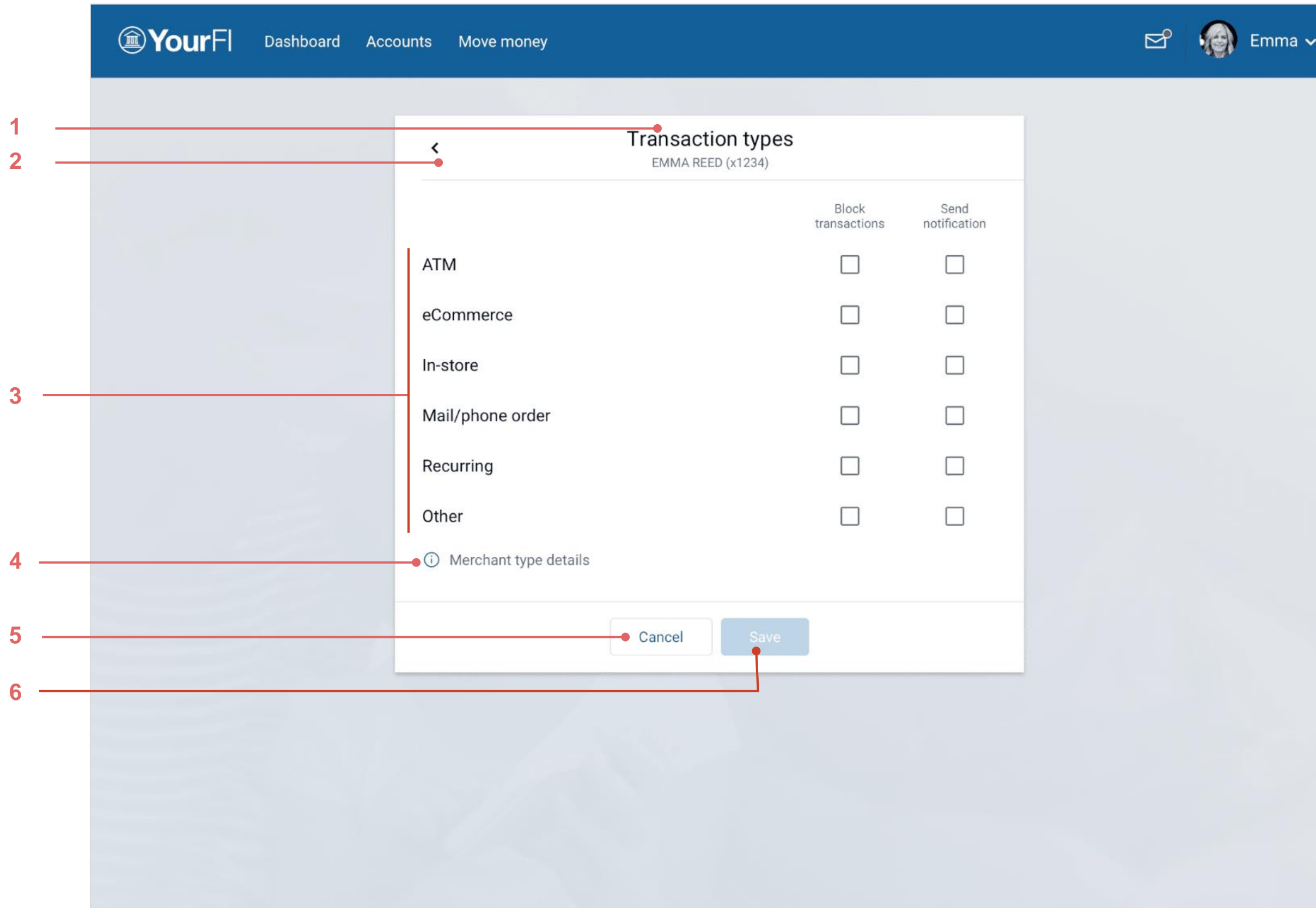
The list of descriptions are provided by our API from PSCU.

- In-store
- Online shopping
- Mail/phone order
- Auto pay
- ATM
- Other

5. Transaction type details

Pushes the end user to a new screen that displays all transaction type descriptions.

Transaction types



1. Transaction types

A stacked header showing **Transaction types** as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Back

Takes you back to the *Card protection* screen.

If an end user has interacted with the toggle and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Full transaction types list

The list of descriptions are provided by our API from PSCU.

- In-store
- Online shopping
- Mail/phone order
- Auto pay
- ATM
- Other

4. Transaction type details

Triggers transaction type details dialog.

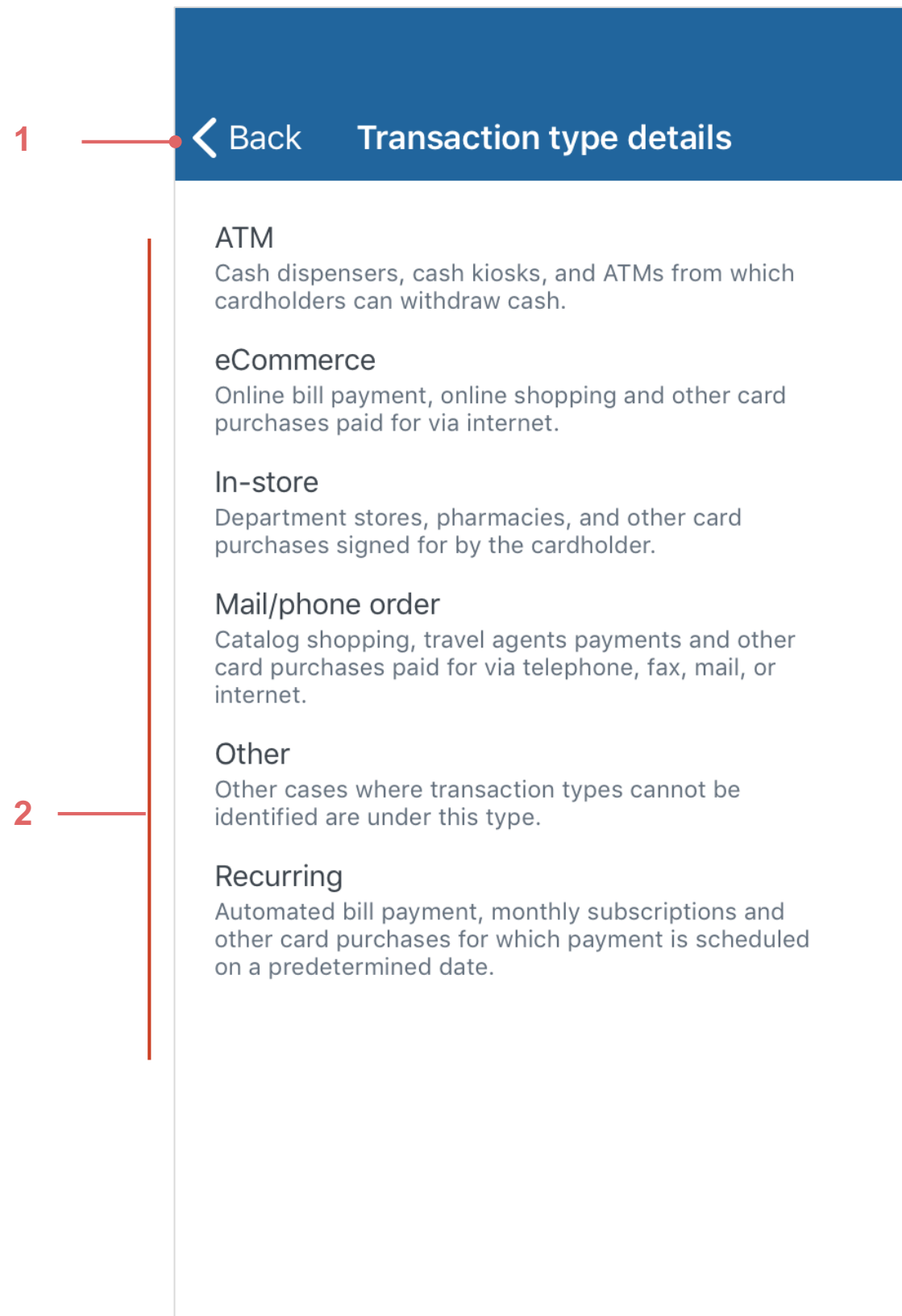
5. Cancel

Functions the same as the **Back** action.

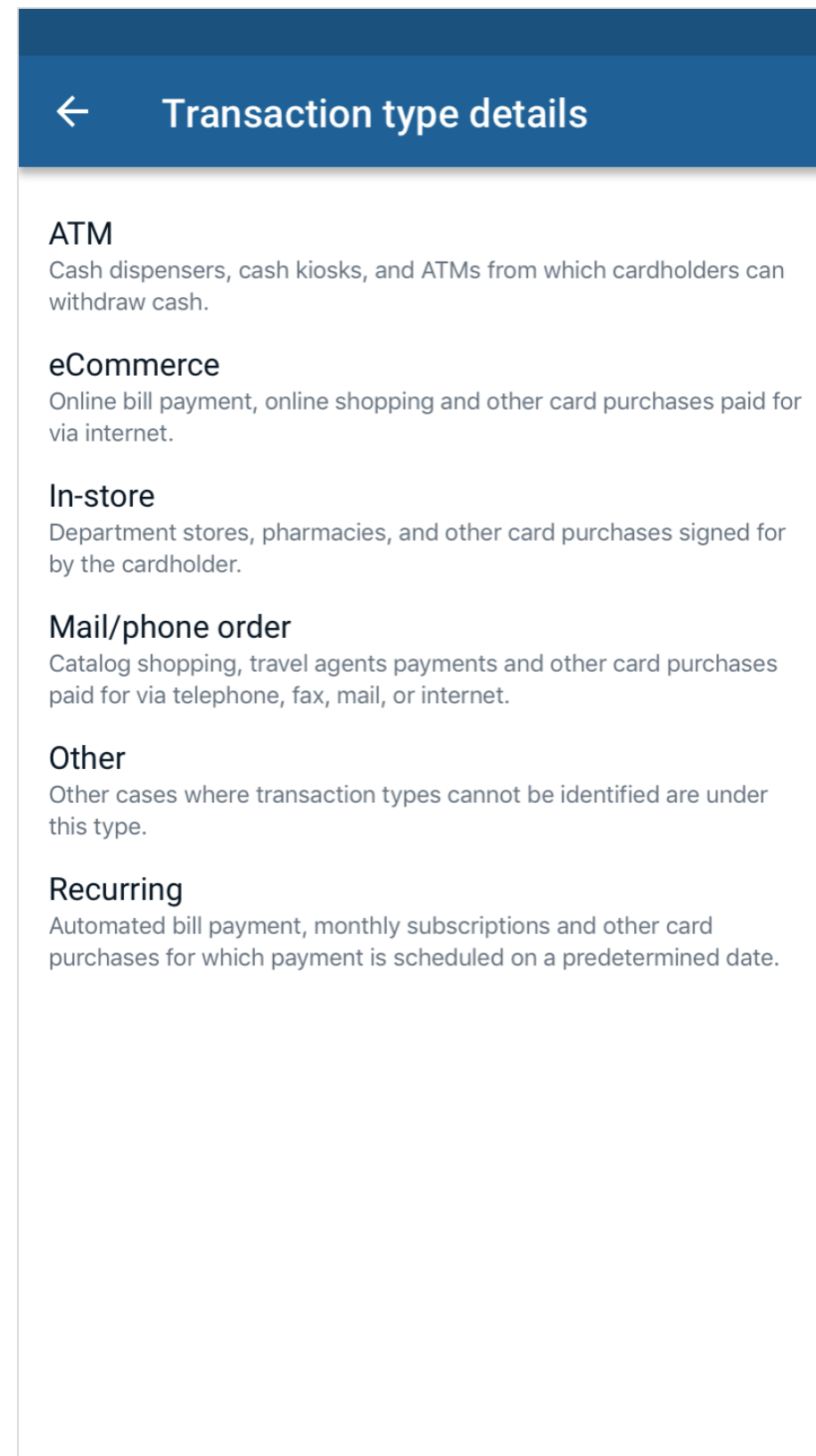
6. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

Transaction type details



iOS®



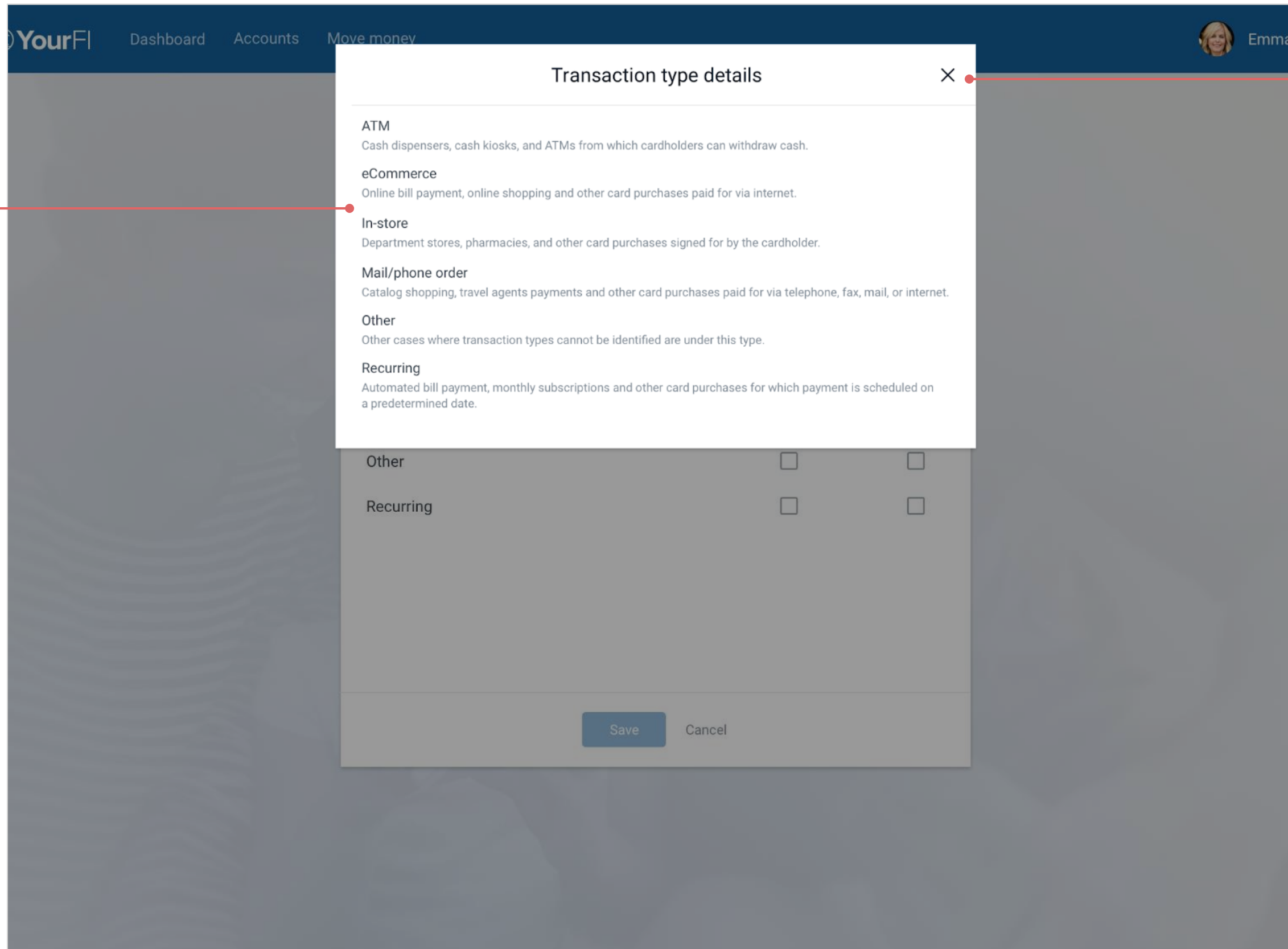
Android™

1. Back

Takes you back to the *Merchant types* screen.

2. Transaction type descriptions

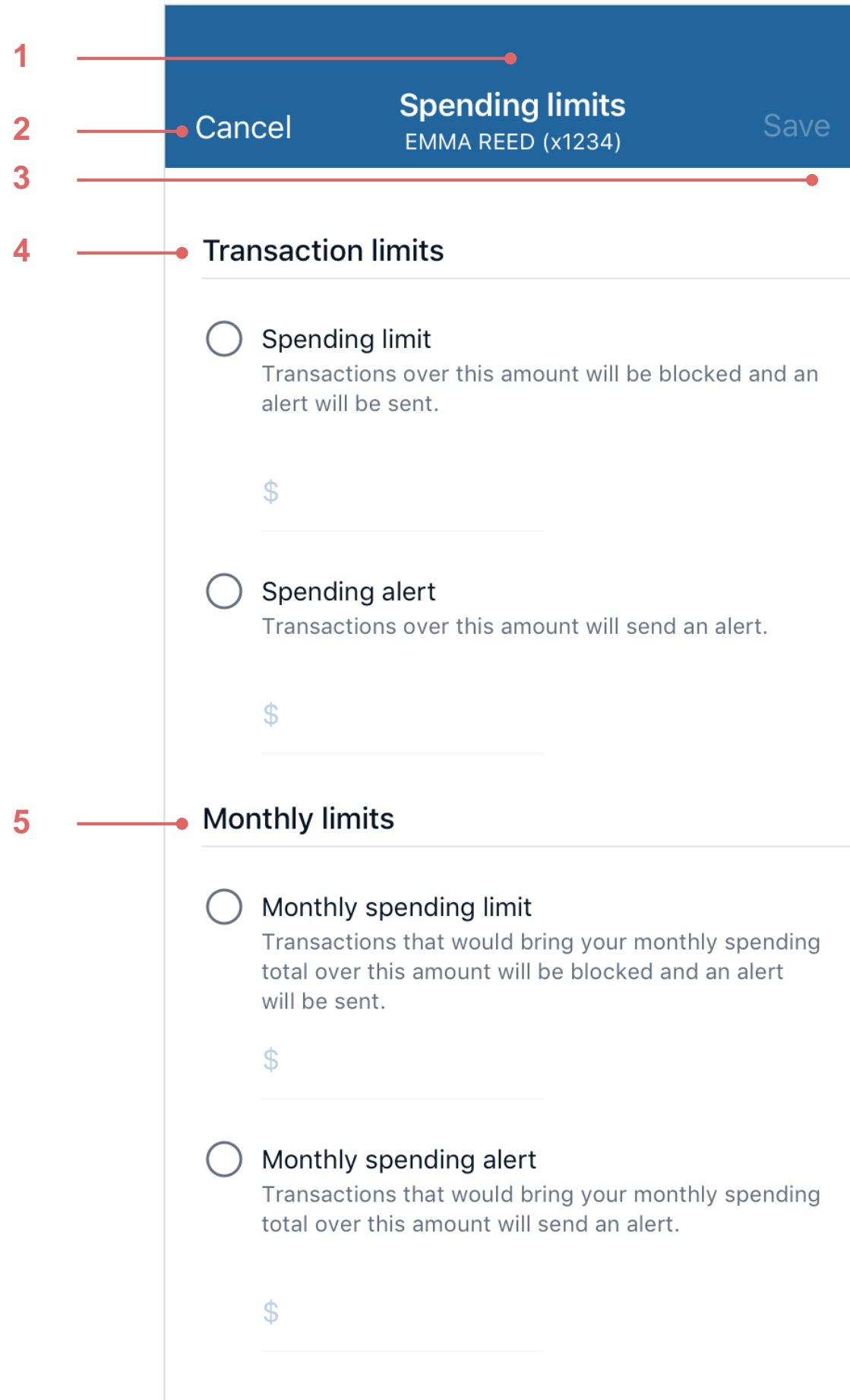
Transaction type details



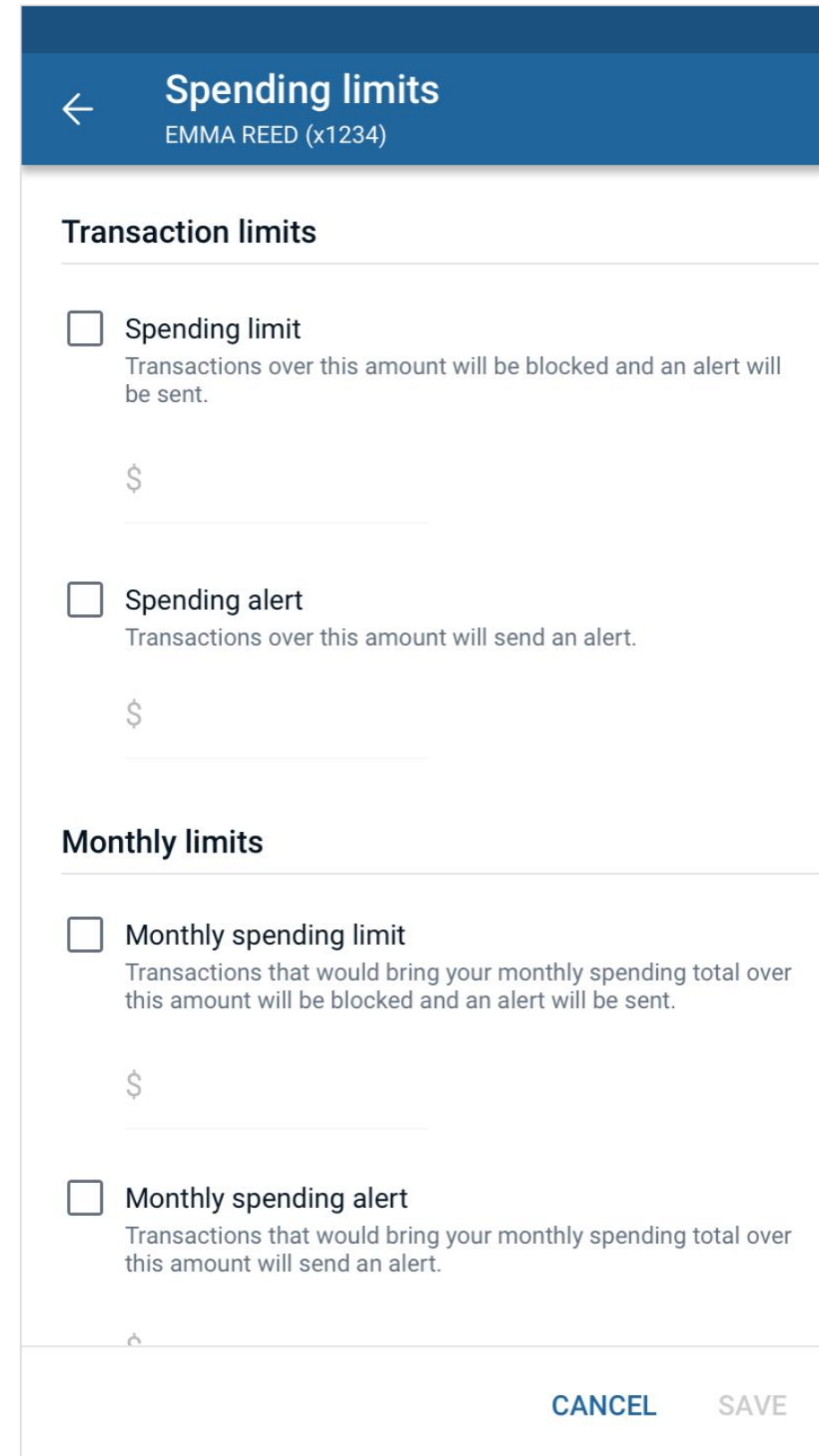
1. Close
Dismisses dialog.

2. Transaction type details

Spending limits



iOS®



Android™

1. Spending limits

A stacked header showing `Spending limits` as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits OK with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Cancel (iOS®), Back (Android™)

Takes you back to the *Card protection* screen.

If an end user has interacted with the toggle and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

4. Transaction limits

Includes transaction spending limits and alerts. Input fields remain unavailable until the end user selects the toggle to set a limit or alert.

5. Monthly limits

Includes monthly spending limit and alerts. Input fields remain unavailable until the end user selects the toggle to set a limit or alert.

Spending limits

1 Spending limits

2 <

3 Transaction limits

Spending limit
Transactions over this amount will be blocked and an alert will be sent.

\$

Spending alert
Transactions over this amount will send an alert.

\$

4 Monthly limits

Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.

\$

Monthly spending alert
Transactions that would bring your monthly spending total over this amount will send an alert.

\$

5 Cancel

6 Save

1. Spending limits

A stacked header showing **Spending limits** as the title and including the card holder name and last four of the card number in parenthesis.

If all preferences don't successfully save, a generic error dialog appears. Once the end user hits **OK** with the dialog, this view is refreshed to reflect the changes that were successfully set.

2. Back

Takes you back to the *Card protection* screen.

If an end user has interacted with the toggle and not saved their action, it triggers a dialog indicating that the end user's changes will not be saved if they continue.

3. Transaction limits

Includes transaction spending limits and alerts. Input fields remain unavailable until the end user selects the toggle to set a limit or alert.

4. Monthly limits

Includes monthly spending limit and alerts. Input fields remain unavailable until the end user selects the toggle to set a limit or alert.

5. Save

Remains unavailable until the end user changes the current status of the toggle. If the state is changed from inactive to active, or vice versa, the **Save** button changes to active state.

6. Cancel

Functions the same as the **Back** action.

Mobile: Spending limits error

Cancel Spending limits EMMA REED (x1234) Save

Transaction limits

- Spending limit
Transactions over this amount will be blocked and an alert will be sent.
\$500.00
- Spending alert
Transactions over this amount will send an alert.
\$600.00
Must be less than the spending limit

Monthly limits

- Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.
\$4000.00
- Monthly spending alert
Spending that will cause your monthly total to go over this amount will send an alert.
\$3000.00

iOS®

← Spending limits EMMA REED (x1234)

Transaction limits

- Spending limit
Transactions over this amount will be blocked and an alert will be sent.
\$5000.00
- Spending alert
Transactions over this amount will send an alert.
\$600.00
Must be less than the spending limit

Monthly limits

- Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.
\$4000.00
- Monthly spending alert
Transactions that would bring your monthly spending total over this amount will send an alert.

CANCEL SAVE

Android™

1. Input text error

If the spending alert is greater than or equal to the spending limit amount, an inline error that states **Must be less than the spending limit** appears.

Online: Spending limits error

The screenshot shows a mobile banking app interface. At the top, there is a blue navigation bar with the 'YourFi' logo and menu items: 'Dashboard', 'Accounts', and 'Move money'. On the right side of the bar, there is a notification icon, a user profile picture, and the name 'Emma' with a dropdown arrow. Below the navigation bar, the main content area is a light gray background. In the center, there is a white modal window titled 'Spending limits' for 'EMMA REED (x1234)'. The modal is divided into two sections: 'Transaction limits' and 'Monthly limits'. Under 'Transaction limits', there are two checked items: 'Spending limit' with a value of '\$500.00' and 'Spending alert' with a value of '\$600.00'. The '\$600.00' input field has a red error message below it: 'Must be less than the spending limit'. Under 'Monthly limits', there are two checked items: 'Monthly spending limit' with a value of '\$4000.00' and 'Monthly spending alert' with a value of '\$3000.00'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Save'. A red number '1' is positioned to the left of the modal, with a red line pointing to the error message.

1. Input text error

If the spending alert is greater than or equal to the spending limit amount, an inline error that states `Must be less than the spending limit` appears.

Mobile: Monthly spending limits error

Cancel Spending limits Save
EMMA REED (x1234)

Transaction limits

Spending limit
Transactions over this amount will be blocked and an alert will be sent.

\$5000.00

Must be less than the monthly spending limit

Spending alert
Transactions over this amount will send an alert.

\$250.00

Monthly limits

Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.

\$4000.00

Monthly spending alert
Spending that will cause your monthly total to go

iOS®

← Spending limits
EMMA REED (x1234)

Transaction limits

Spending limit
Transactions over this amount will be blocked and an alert will be sent.

\$5000.00

Must be less than the monthly spending limit

Spending alert
Transactions over this amount will send an alert.

\$250.00

Monthly limits

Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.

\$4000.00

Monthly spending alert
Transactions that would bring your monthly spending total over this amount will send an alert.

CANCEL SAVE

Android™

1. Input text error

If the spending limit is greater than or equal to the Monthly spending limit amount, an inline error appears that states:

Must be less than the monthly spending limit

Mobile: Monthly spending limits error (205)

The screenshot shows the 'Spending limits' screen for Emma Reed (x1234). The screen is divided into three sections: Transaction limits, Spending alert, and Monthly limits. Each section has a checked checkbox and a text input field. The 'Spending limit' input field contains '\$5000.00' and has a red error message below it: 'Must be less than the monthly spending limit'. A red line with the number '1' points to this error message. The 'Spending alert' input field contains '\$250.00'. The 'Monthly spending limit' input field contains '\$4000.00'. The 'Monthly spending alert' input field contains '\$3000.00'. At the bottom, there are 'Cancel' and 'Save' buttons.

Transaction limits

- Spending limit
Transactions over this amount will be blocked and an alert will be sent.
\$5000.00
1 Must be less than the monthly spending limit
- Spending alert
Transactions over this amount will send an alert.
\$250.00

Monthly limits

- Monthly spending limit
Transactions that would bring your monthly spending total over this amount will be blocked and an alert will be sent.
\$4000.00
- Monthly spending alert
Transactions that would bring your monthly spending total over this amount will send an alert.
\$3000.00

Cancel Save

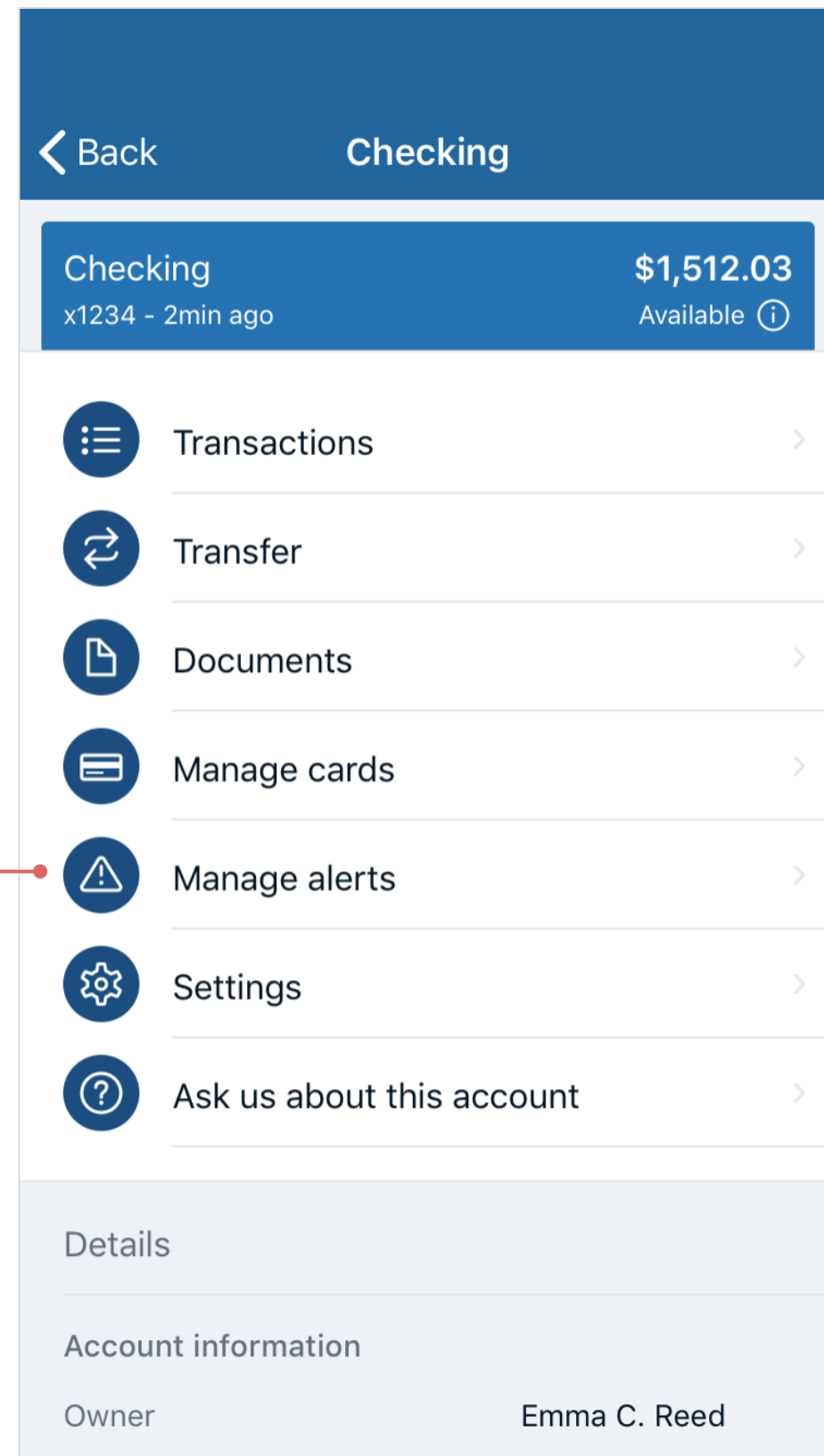
1. Input text error

If the spending limit is greater than or equal to the Monthly spending limit amount, an inline error appears that states:

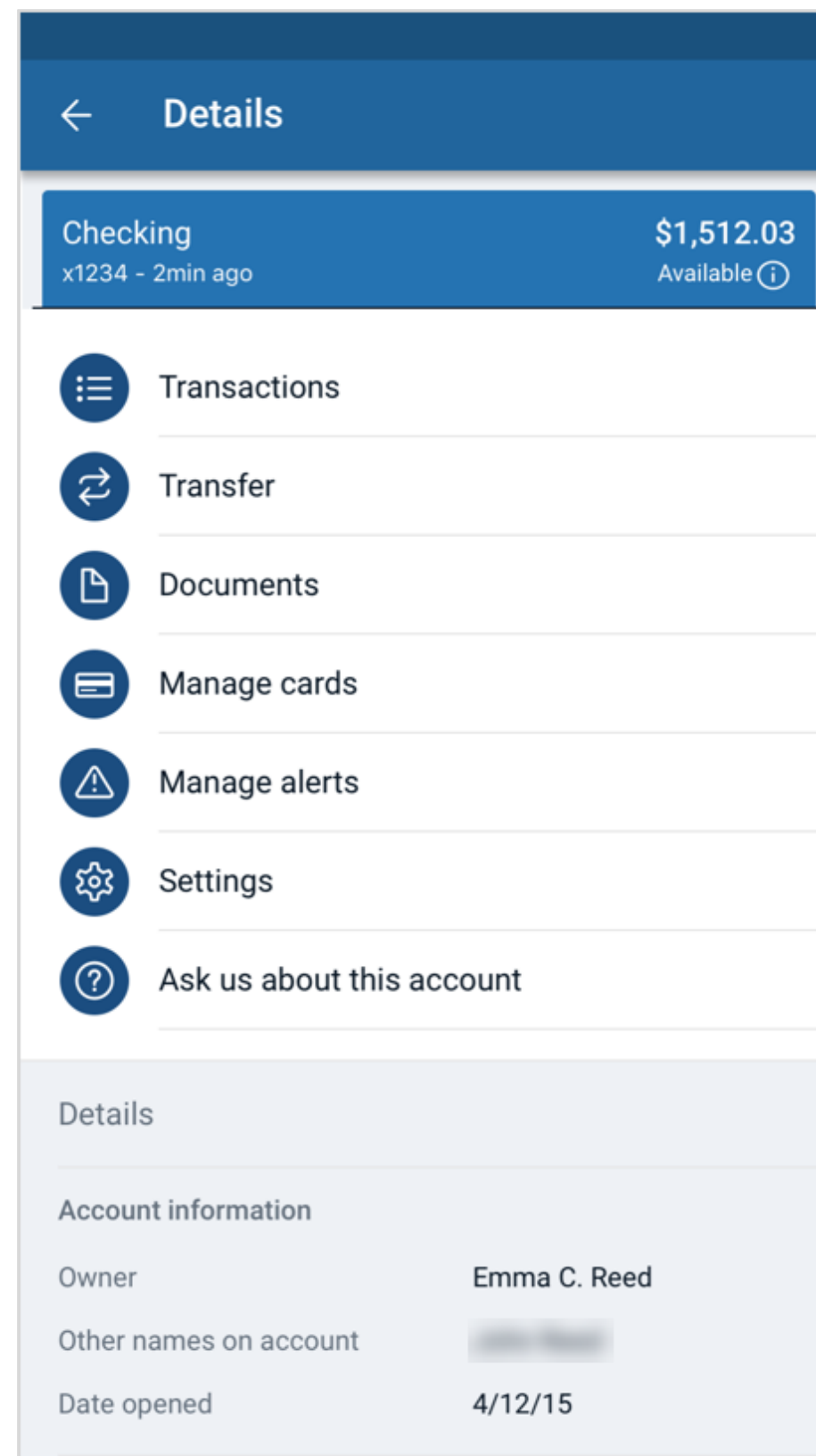
Must be less than the monthly spending limit

Alert preferences linking

Mobile: Account details



iOS®



Android™

1. Alert preferences button

Tapping this cell takes you to the *Manage alerts* screen where you can manage account alerts and set up card controls and protections.

Online: Account details

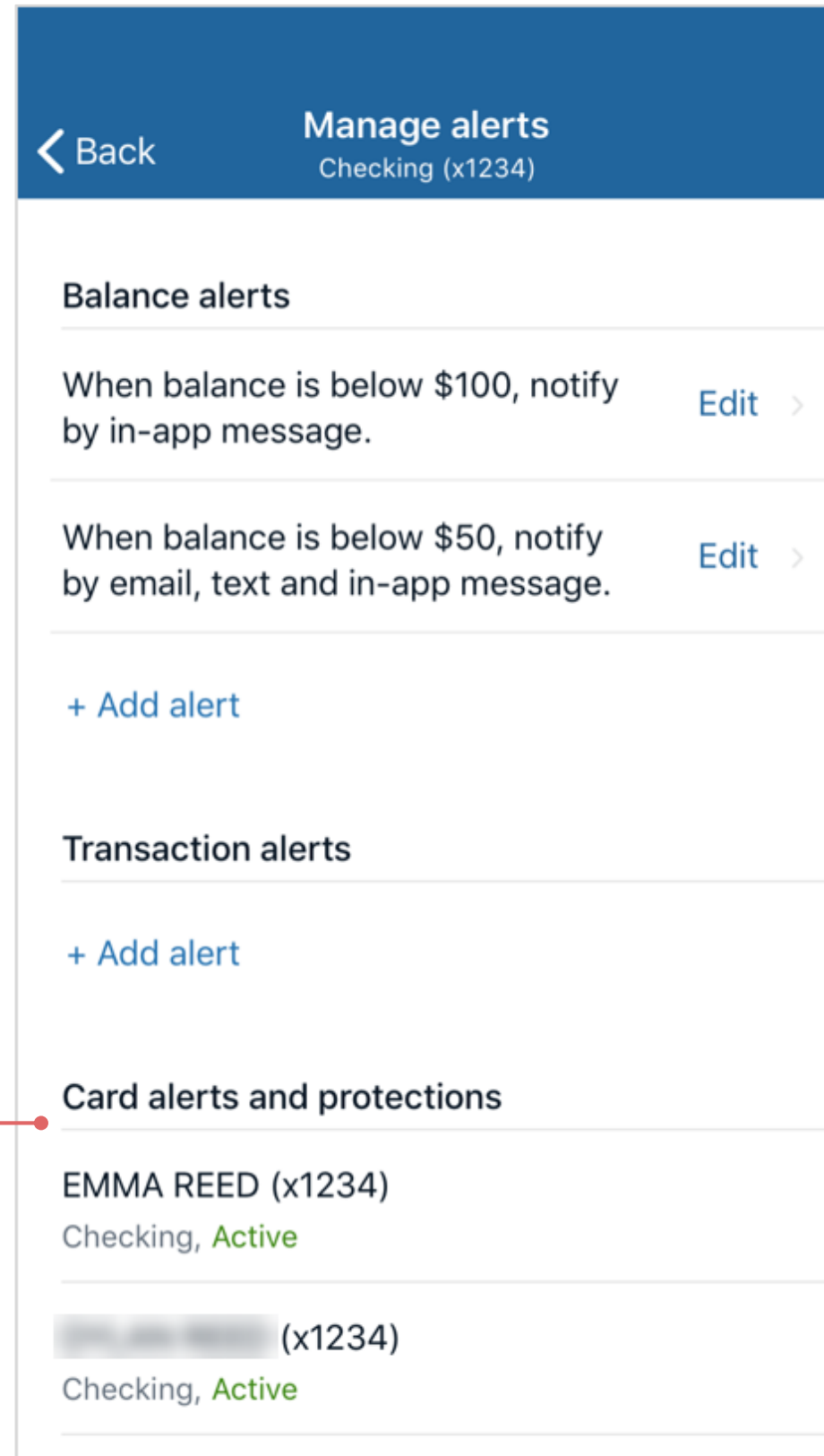
The screenshot displays the 'YourFI' mobile banking interface. At the top, there are navigation options: 'Dashboard', 'Accounts', and 'Move money'. The user's name 'Emma' is visible in the top right corner. The main header shows the account type 'Checking' with a dropdown arrow and the account number 'x1234'. The current balance is '\$1,512.03 Available'. Below the header, there are two main sections: 'Activity' and a right-hand menu. The 'Activity' section shows a list of transactions, including a pending payment of \$34.34, an ATM deposit of \$250.00, and several debit transactions from 'HOBBY-LOBBY #0135 WATERLOO IA 8546'. The right-hand menu includes options like 'Transfer', 'Documents', 'Stop payment', 'Spending habits', 'Reorder checks', 'Alert preferences', 'Settings', and 'Ask us about this account'. A red arrow points to the 'Alert preferences' button. Below the menu is a 'Card management' section showing three cards: one active (1234), one active (4321), and one stolen (1234). A 'Details' section is partially visible at the bottom.

Date	Description	Amount
NOV 20	SOHO SUSHI BAR/THE ST CEDAR FALLS IA PENDING	\$34.34
NOV 18	ATM DEPOSIT	+\$250.00
NOV 12	KEY WEST FITNESS	\$75.00
NOV 11	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
NOV 11	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$3.63
OCT 20	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
SEP 20	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
AUG 20	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
JUL 20	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
JUN 20	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63
JUN	HOBBY-LOBBY #0135 WATERLOO IA 8546	\$30.63

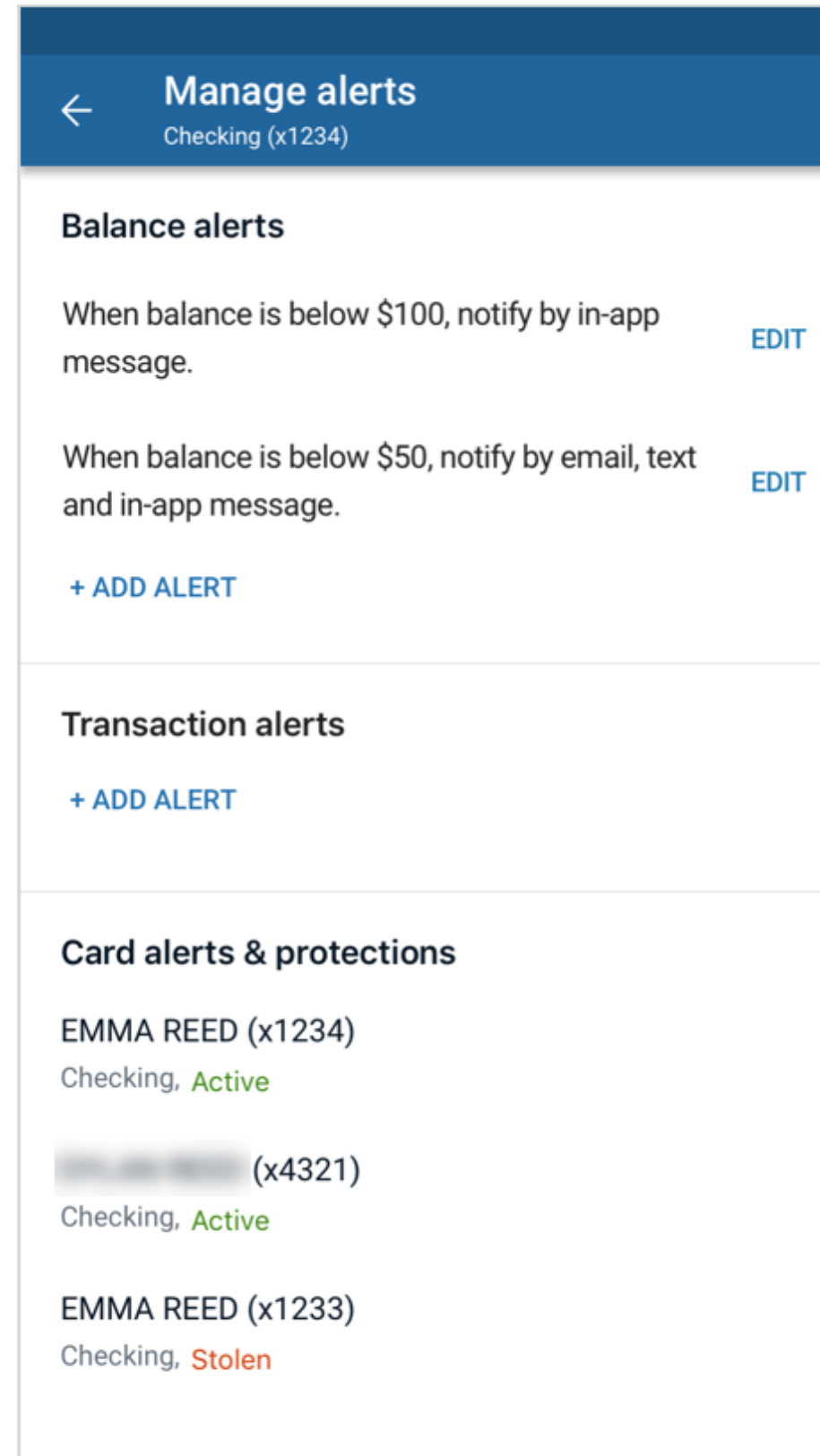
1. Alert preferences button

Tapping this cell takes you to the *Manage alerts* screen where you can manage account alerts and set up card controls and protections.

Mobile: Alert preferences



iOS®



Android™

1. Back

Takes you back to the *Account details* screen.

2. Account alerts

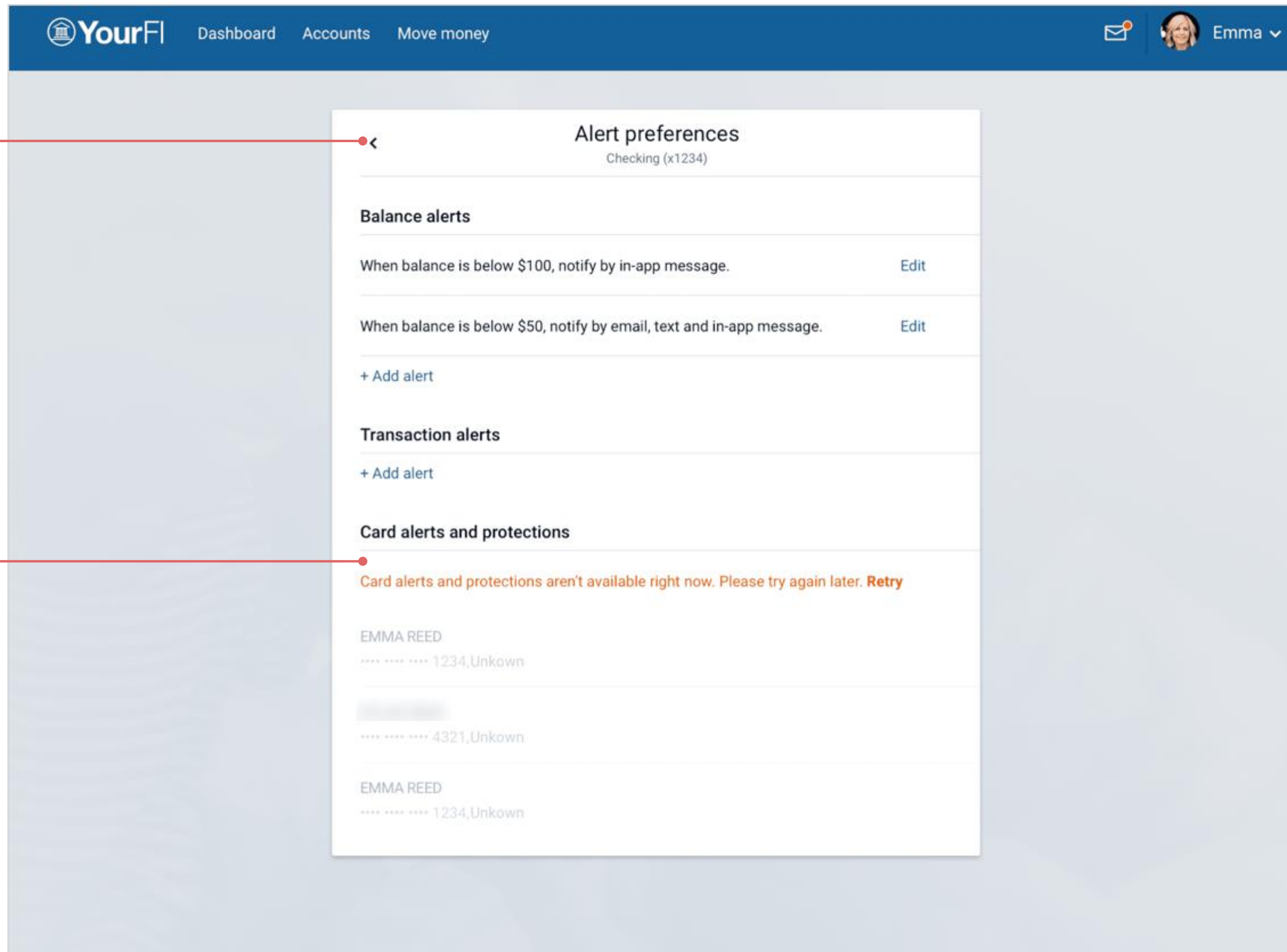
Tapping this cell takes you to the account alerts list of controls.

3. Card alerts

Functions the same as the Card management workflow. In other words, each active card navigates to the MCR alerts and controls.

Only shows cards with Cards Alerts and Protection enabled. It filters out cards that do not. If the cards have no configuration object available with them, then they show as unavailable.

Online: Alert preferences



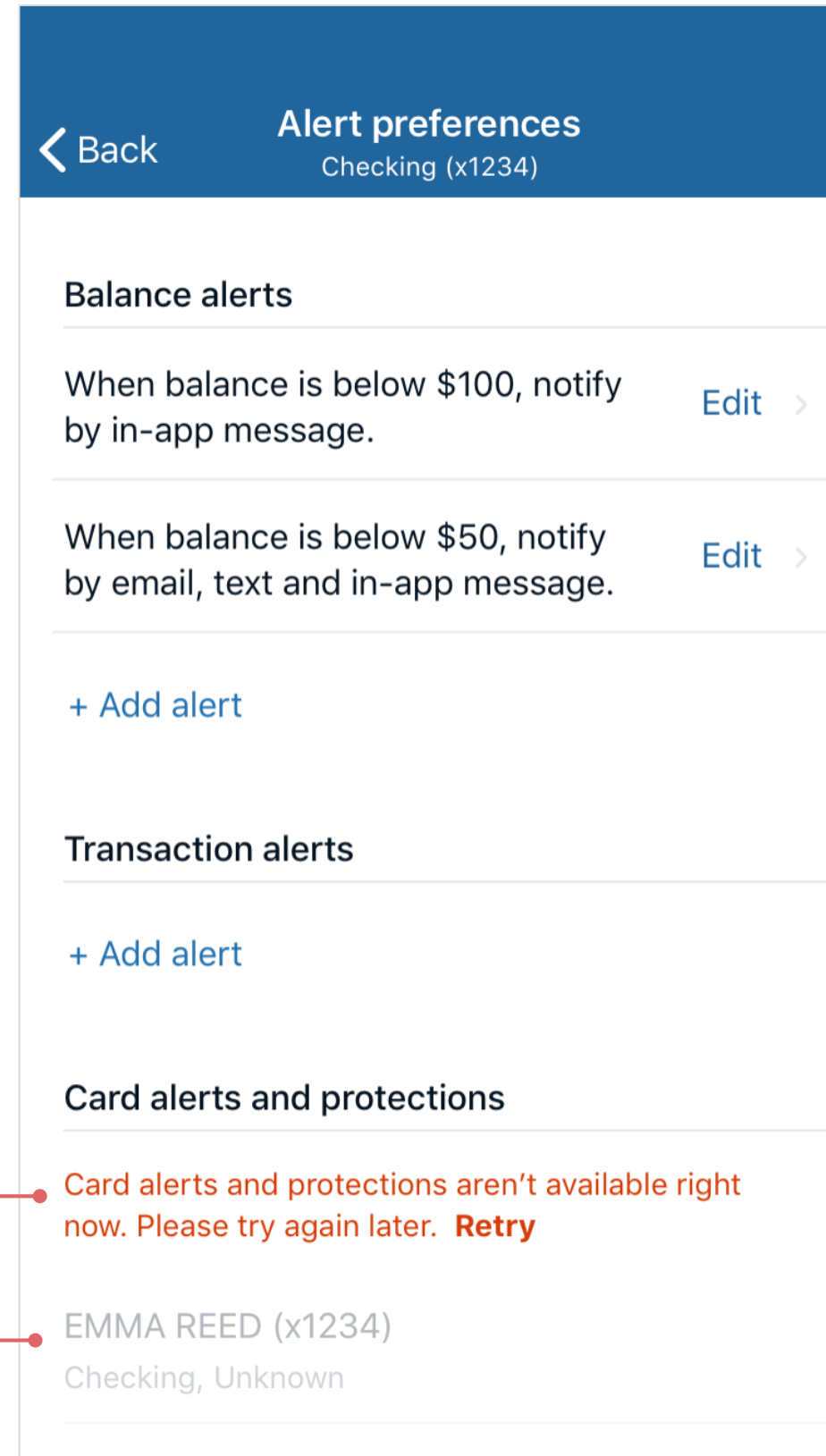
Notes

For accounts with MyCardRules™, the Alert preferences view also displays a list of cards they can manage alerts and protections for.

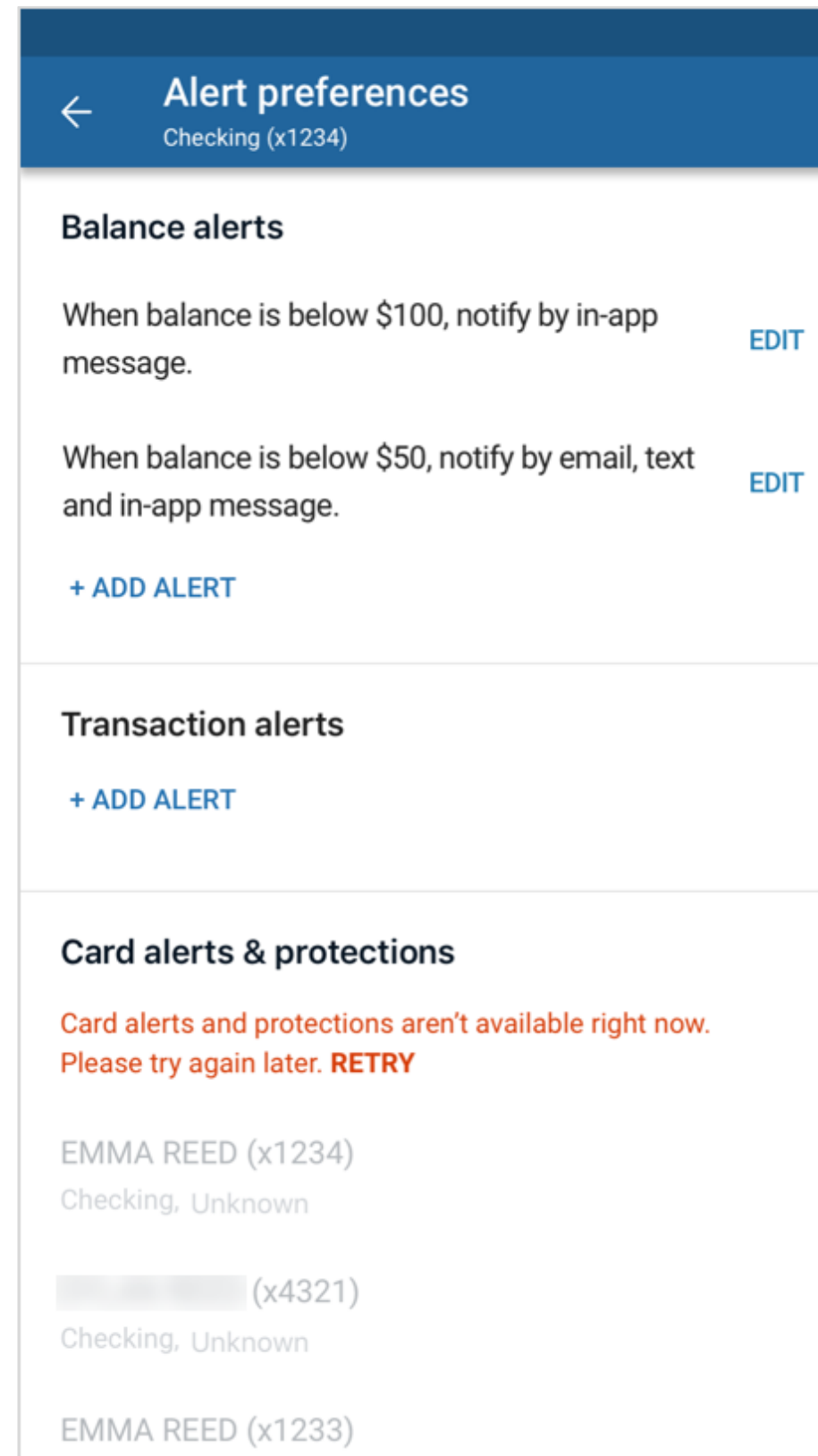
1. Card services and protections

Functions the same as the Card management workflow. In other words, each active card navigates to the MCR alerts and controls.

Mobile: Alert preferences and protection error (500)



iOS®



Android™

The end user can only access card controls when a successful call is made. When an error occurs, non-OnDot controls cannot be accessed.

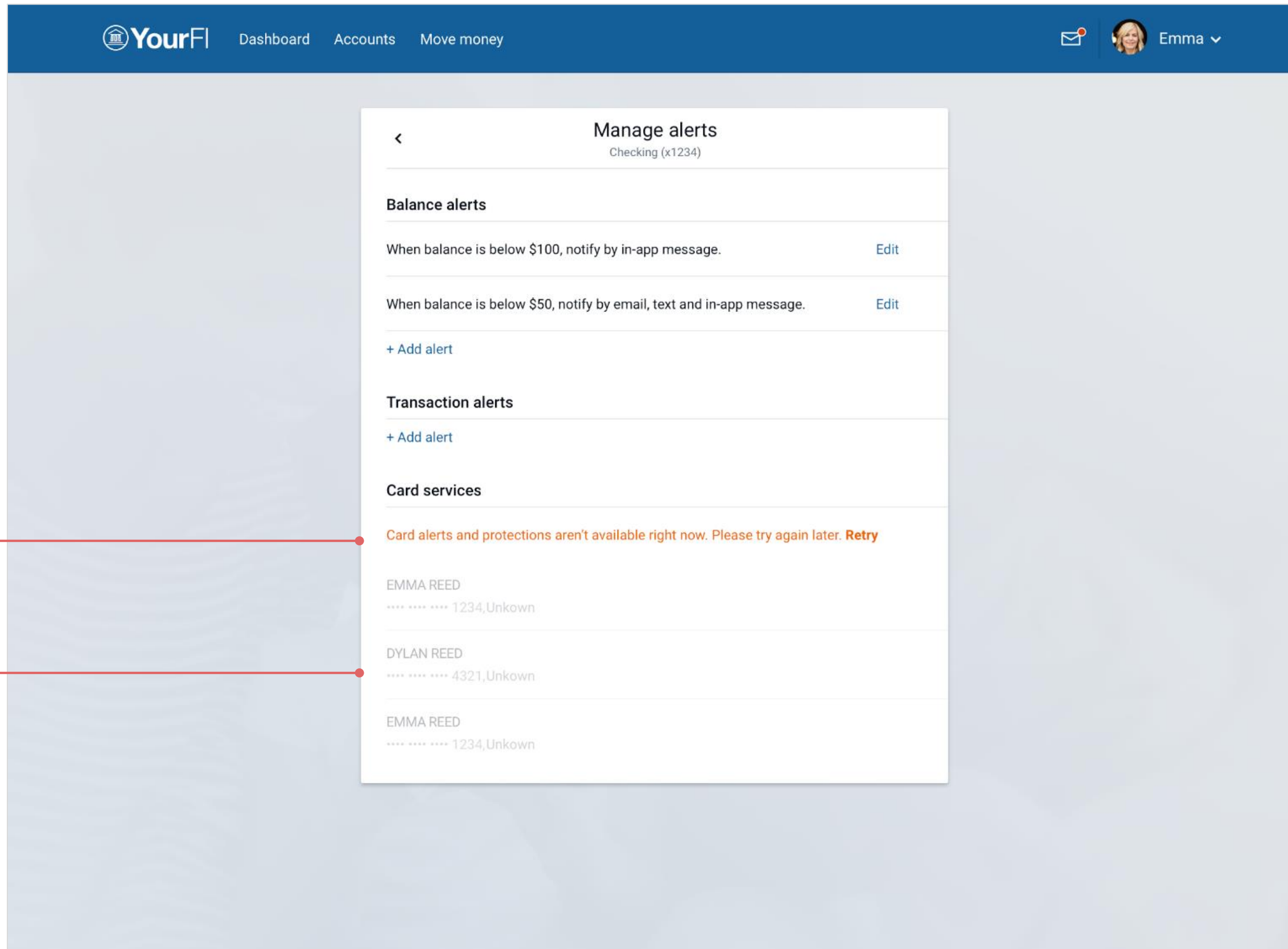
An *Unknown* status is communicated to the end user and indicates that not all of the controls are available.

1. 500 error message + Retry

Card alerts and protections aren't available right now. Please try again later. **Retry**

Retry makes the call again.

Online: Alert preferences and protection error (500)



Controls are only returned when a successful call is made. When an error occurs, non-OnDot controls cannot be accessed.

An *Unknown* status is communicated to the end user and indicates that not all of the controls are available.

1. 500 error message + Retry

Card alerts and protections aren't available right now. Please try again later. **Retry**

Retry makes the call again.

2. Card status

Card status is hidden during a 500 error.