## Creating alerts

Create alerts to receive warnings about your accounts, notifications about transactions, and reminders for important events.

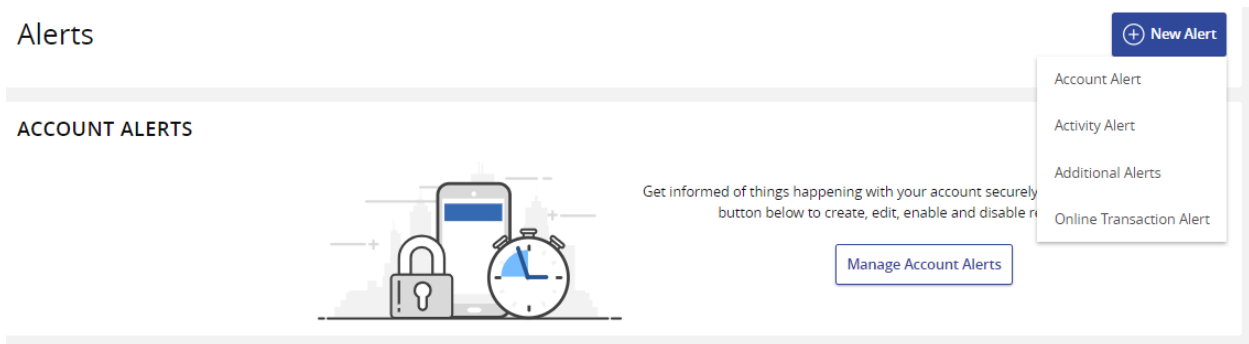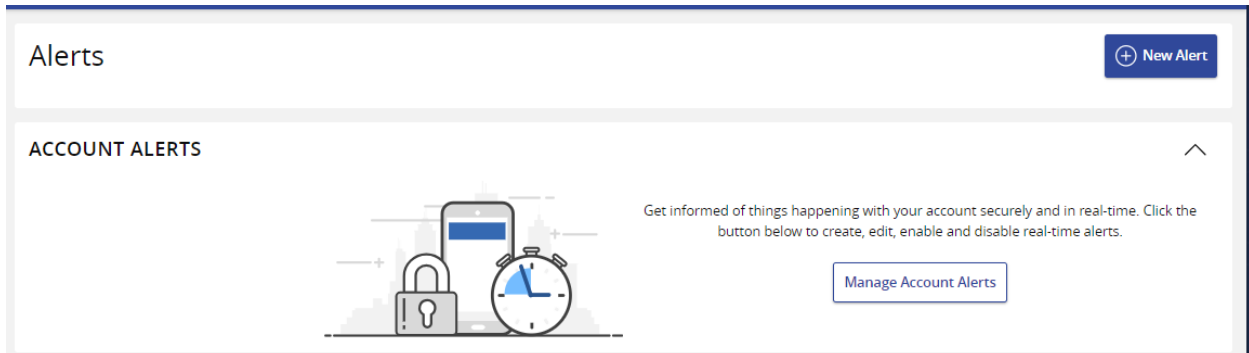Alert types vary according to your settings and may include:

- Account alerts
- History alerts
- Insufficient funds alerts
- Non-online transactions alerts
- Online transaction alerts

To create an alert:

From the navigation menu, click or tap Settings > Alert Settings.
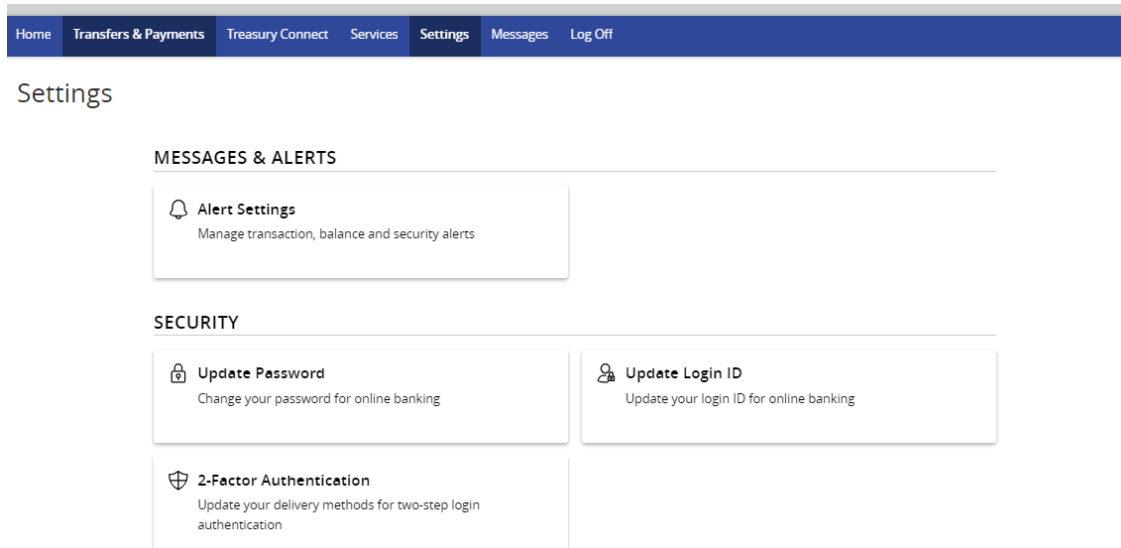
Click or tap New Alert and select an alert type.

- Account Alert
- Activity Alert
- Additional Alerts
- Online Transaction Alert

Complete the required steps for the alert type.

Click or tap an Alert Delivery Method and provide any required information.

Note: If you choose to receive alerts as text messages, you must select the Agree to Terms check box. Click or tap Create Alert.

Account

Commerical Checking 4565 $40.63 ⌄

Account balance type

Available Balance ⌄

Frequency

When alert criteria is met ⌄

Amount

| More than | Less than | Exactly |

| $ | 5.00 |

Alert Delivery Method

| Email | Voice | SMS Text Message | Secure Message Only |

Country

United States ⌄

SMS Text Number

(402) 555-5555

Terms and Conditions

☐ Agree To Terms

| Go back | Create Alert |

In the success message, click or tap Close. The new alert appears on the Alerts page.

Enabling and disabling alerts

You can use the Alerts page to temporarily disable an existing alert and later enable it again.

To enable or disable an existing alert

In the navigation menu, click or tap Settings > Alerts.

Click or tap the type of alert that you want to disable or enable.

On the Alerts page, locate the existing alert, then do one of the following in the Enabled column:

Click or tap Off to disable the alert.

Click or tap On to enable the alert.

Alerts   ⊕ New Alert

ACCOUNT ALERTS   ⌃

Get informed of things happening with your account securely and in real-time. Click the
button below to create, edit, enable and disable real-time alerts.

Manage Account Alerts

ACCOUNT ALERTS (1)   ⌃

When my Available Balance is Less than $5.00, send me an SMS text message (4025555555).
Commerical Checking - 4565
Edit

Alerts   ⊕ New Alert

ACCOUNT ALERTS   ⌃

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Commerical Checking - 4565
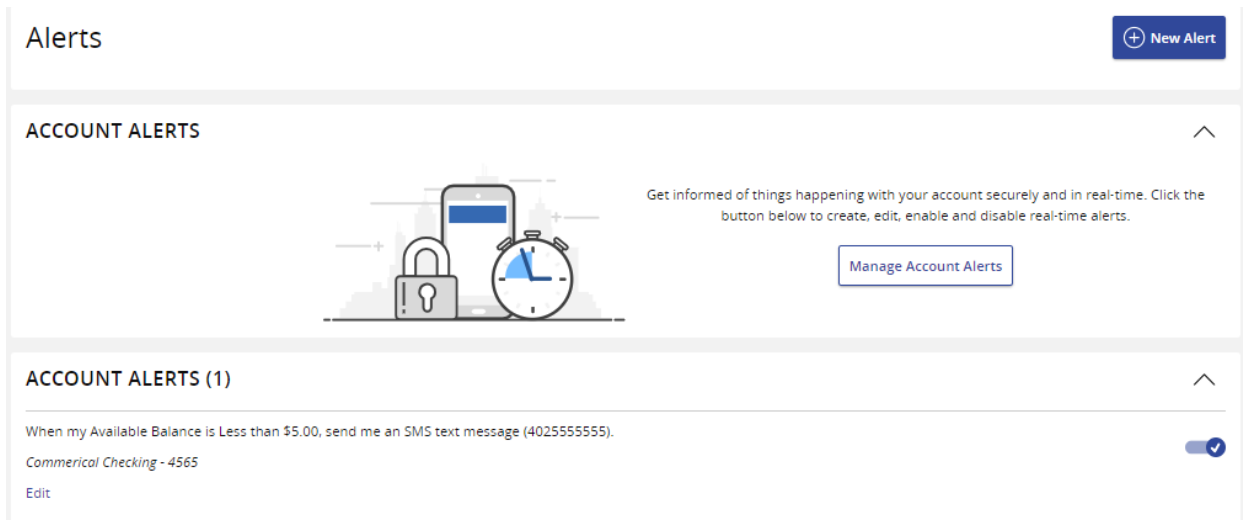Edit

When the Save Alert page appears, click or tap Close.

Tip: You can hide Alert details, such as the description and frequency, by clicking or tapping the show/hide icons (⌃)(⌄).

Deleting alerts

You can delete an alert through the Alerts page. Deleting an alert removes it permanently.

To delete an alert

From the navigation menu, click or tap Settings > Alerts.

Click or tap Edit for the alert you want to delete. The Edit Account Alert page appears.
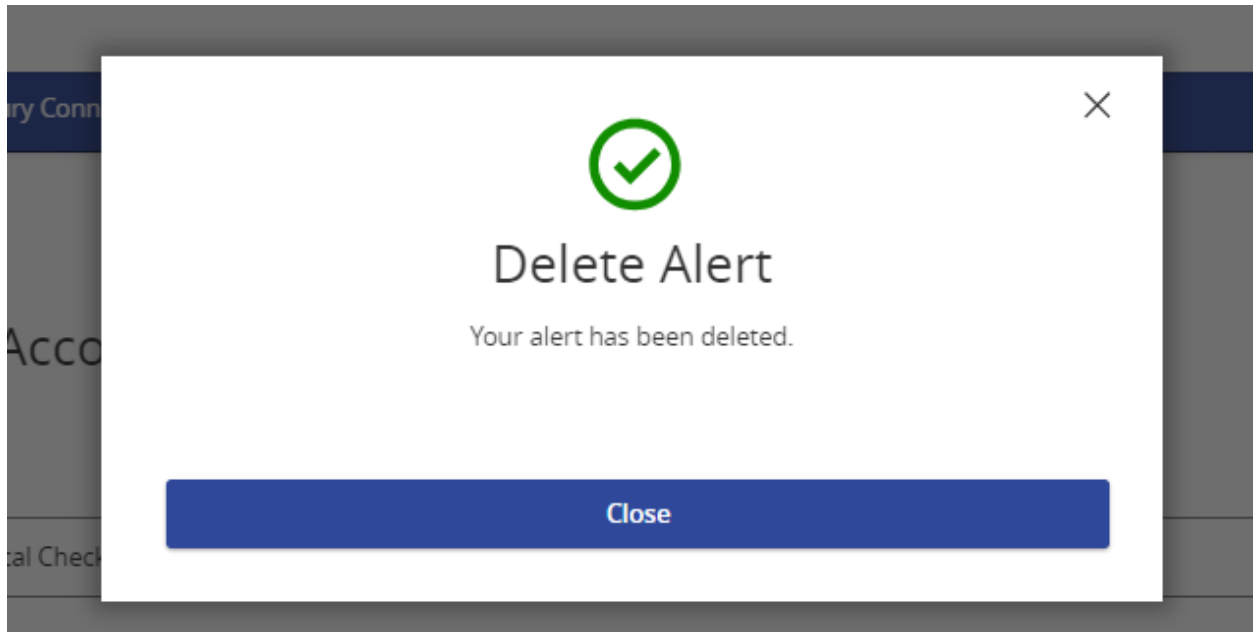
Click or tap Delete.

Click or tap Confirm to delete the alert.
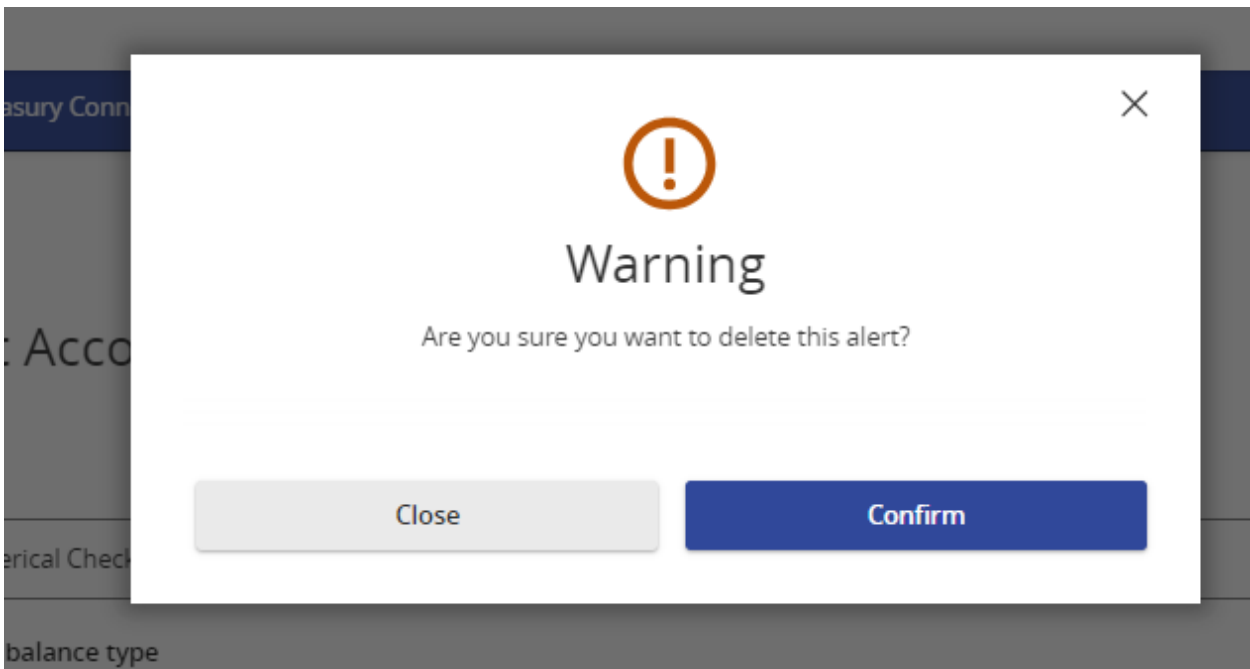
In the success message, click or tap Close.

Managing Alerts

Alerts remind you of important events, warn you about the status of your accounts, and notify you when transactions occur.

You can use the system's default alerts or create and customize your own on the Alerts page. You can access the Alerts page through Settings >Alerts in the navigation menu.

Additional Alerts

Under the Additional Alerts section, there are transaction, balance, security, and additional scheduled alerts that can be set up. These can be accessed through Settings>Alerts>Additional Alerts, or Settings>Alerts>Manage Alerts
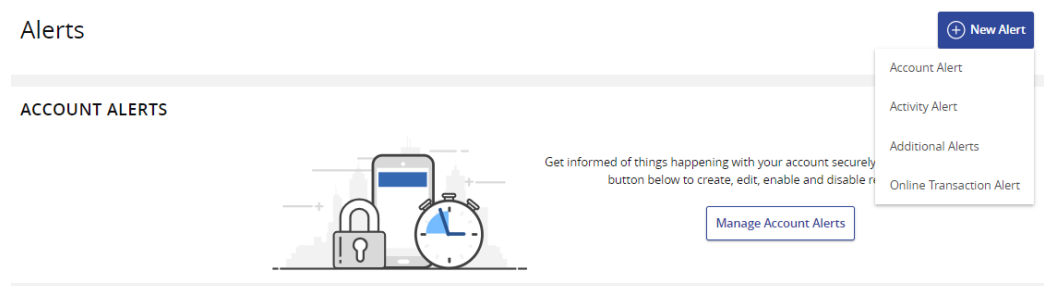
To activate the additional alerts, the enrollment process must be completed.

Notifications

Search

Enter activation code

Check each contact method and enter the activation code sent.

ℹ Activation code(s) sent.

✉ testuser@gmail.com

1729837   Resend code

Next

What are notifications?

Notifications are a great way to stay on top of important things happening with your profile and accounts.

You can turn on the notifications that matter most to you and personalize them to meet your needs.

Tip

ℹ You can change your primary contact method in notifications Settings.

...ifications Settings
...ifications History

---

ions

✕

Enter activation code

Check each contact method and enter the activation code sent.

✉ testuser@gmail.com   ✔ Activated

Next

What are notifications?

Notifications are a great way to stay on top of important things happening with your profile and accounts.

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Tip

ℹ You can change your primary contact method in notifications Settings.

...ifications Settings
...ifications History

Once the enrollment process is complete, the below screen will populate with the alerts available to be set up.

Search 🔍

Account Alerts

ATM/Debit Card
(Get alerts when ATM/Debit card transactions and changes occur.)

◯ ATM transaction over selected amount   📱 💬 ✉ ›

Balance
(Low balance alerts can help you avoid overdrafts or maintain balances. High balance alerts can help you identify when you might want to transfer or invest money.)

◯ Account balance above selected amount   📱 💬 ✉ ›

◯ Account balance below selected amount   📱 💬 ✉ ›

◯ Account was overdrawn   📱 💬 ✉ ›

Certificates
(Get alerts when your certificate of deposit is about to mature so you can decide whether to renew or cash out. Also know when a new CD is funded.)

◯ Initial deposit was posted to CD account   📱 💬 ✉ ›

Other
(Get alerts when something unexpected happens.)

◯ Account status changed   📱 💬 ✉ ›

◯ Charge back occurred   📱 💬 ✉ ›

◯ Check was returned   📱 💬 ✉ ›

◯ Debit card pre-authorization hold added   📱 💬 ✉ ›

◯ Debit card pre-authorization hold added above selected amount   📱 💬 ✉ ›

◯ Fee was charged to an account   📱 💬 ✉ ›

◯ Statement was generated   📱 💬 ✉ ›

◯ Stop payment placed on account   📱 💬 ✉ ›

Transaction
(Get alerts when deposits, checks, or withdrawals post to your account.)

◯ ACH withdrawal (debit) over threshold amount   📱 💬 ✉ ›

◯ Check number XXXX cleared   📱 💬 ✉ ›

◯ Credit transaction was posted   📱 💬 ✉ ›

◯ Debit transaction was posted   📱 💬 ✉ ›

◯ Deposit was credited to an account   📱 💬 ✉ ›

Transaction equal to selected amount   ▢ 🗩 ✉ ›

Transaction over selected amount   ▢ 🗩 ✉ ›

Withdrawal over selected amount   ▢ 🗩 ✉ ›

Transfers

(Get alerts when large incoming or outgoing transfers post to your account.)

Outgoing transfer over selected amount   ▢ 🗩 ✉ ›

Transfer failed   ▢ 🗩 ✉ ›

Transfer scheduled   ▢ 🗩 ✉ ›

Profile Alerts

Other

(Get alerts when something unexpected happens.)

Broadcast alerts   ▢ 🗩 ✉ ›

Security

(Get alerts if someone changes your information or is trying to get access to your online banking.)

Address was changed   ▢ 🗩 ✉ ›

Email address was changed   ▢ 🗩 ✉ ›

Name was changed   ▢ 🗩 ✉ ›

Nickname changed in online banking   ▢ 🗩 ✉ ›

Online banking email address was changed   ▢ 🗩 ✉ ›

Online banking login was locked out   ▢ 🗩 ✉ ›

Phone number was changed   ▢ 🗩 ✉ ›

Security question changed in personal online banking   ▢ 🗩 ✉ ›

Temporary password expired for personal online banking   ▢ 🗩 ✉ ›

Scheduled Alerts

Balance

(Low balance alerts can help you avoid overdrafts or maintain balances. High balance alerts can help you identify when you might want to transfer or invest money.)

Account balance   ▢ 🗩 ✉ ›