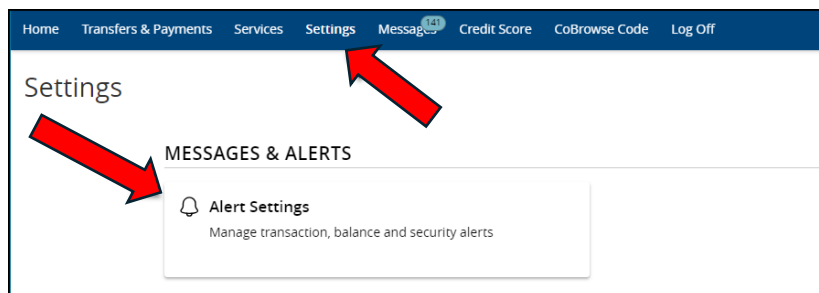
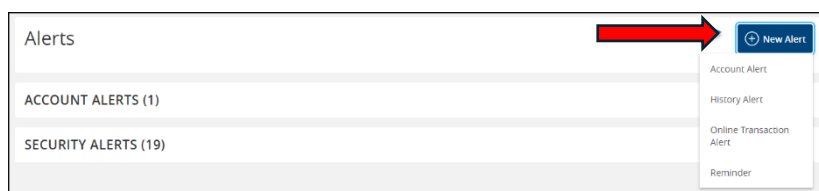


**Step 1: Navigate to Alert Settings**

- Select the 'Settings' menu and then select 'Alerts Settings'.


**Step 2: Create New Alert**

- Click the 'New Alert' button and select the desired type of alert from the drop-down menu.


**Step 3: Determine What Type of Alert to Set**
**Account Alerts**

- Select an 'Account'.
- Select an 'Alert balance type'.
- Select the amount and corresponding comparison.
- Select the desired 'Alert Delivery Method'.
- Enter the target delivery value.
- Click 'Add'.

**New Account Alert**

Account  
 Primary Savings 0080

Account balance type  
 Current Balance

Frequency  
 When alert criteria is met

Amount  
    
 \$

**Alert Delivery Method**

Country  
 United States

SMS Text Number  
 (512) 555-5555

[Terms and Conditions](#)  
☒ Agree To Terms

*(Continued on the Next Page)*

### New Online Transaction Alerts

- Select a 'Transaction' type.
- Select the 'Account'.
- Select the 'Status' of the transaction.
- Select the desired 'Alert Delivery Method'.
- Enter the target delivery value.
- Click 'Create Alert'.

#### New Online Transaction Alert

Transaction

External Transfer

Account

Primary Savings 0080

Status

Processed

Alert Delivery Method

Email

Voice

SMS Text Message

Secure Message Only

Email Address

joe@email.com

Go back
Create Alert

### History Alerts

- Select a 'Transaction' type.
- Select the amount and corresponding comparison.
- Select the 'Account'.
- Select the desired 'Alert Delivery Method'.
- Enter the target delivery value.
- Click 'Create Alert'.

#### New History Alert

Transaction Type

Debit Transaction

Credit Transaction

Check Number

Description

Amount

More than

Less than

Exactly

\$

500.00

Account

Primary Savings 0080

Alert Delivery Method

Email

Voice

SMS Text Message

Secure Message Only

Go back
Create Alert

*(Continued on the Next Page)*

## Reminder Alerts

- Select a 'Event' type.
- Select the desired 'Date'.
- Check box to repeat annually.
- Select the desired 'Alert Delivery Method'.
- Enter the target delivery value.
- Click 'Create Alert'.

### New Reminder

Event  
 Meeting

Select a date  
 02/21/2024

☒ Recurs Every Year

Message (optional)  
 Annual Board Meeting

Alert Delivery Method
 

Email
 Voice
 SMS Text Message
 Secure Message Only

Go back
 Create Alert

## Security Alerts

- Select 'Edit Delivery Preferences' to modify how and where to receive security alerts.
- Security alerts are listed at the bottom of the screen. Select the caret icon to expand the listing of available alerts. The most critical alerts are mandatory and cannot be turned off.

### SECURITY ALERTS (19)

[Edit Delivery Preferences](#)

Alert me when an external transfer is authorized.
 Alert me when a computer/browser is successfully trusted.
 Alert me when my password is changed.
 Alert me when secure access code contact information is changed.
 Alert me when my login ID is changed.