

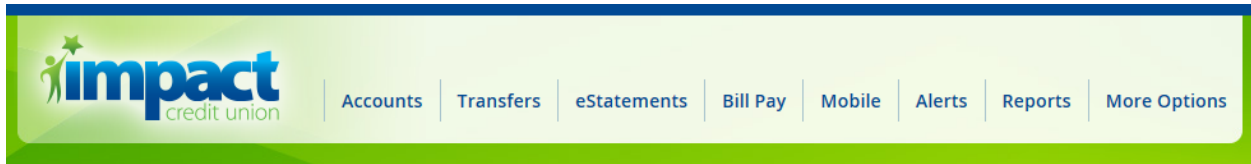
Setting up Transaction Alerts in Home Banking

Things to keep in mind when creating an Alert

- ✓ The criteria is generally a word in the description of the transaction
- ✓ When creating a custom alert, you can enter a word or group of words in the Criteria box and then click on [test this criteria](#) and it will pull up transactions from your account so you can see if you would be getting alerted for the transactions that you want

Criteria: like [Costco over \\$10, Starbucks, or over \\$10](#) [test this criteria](#)

- ✓ If you select [All Accounts](#) for the Account you want alerted for, you will receive an alert for every account in your Account Summary list including joint accounts if you have them
- ✓ The All Day Delivery method will send you an alert shortly after a transaction happens. Summary alerts will summarize all transactions posted during previous day
- ✓ To have a text alert sent to your phone, you will need to load your Text Message Email address (no dashes) under the Primary Contact Info section on the Profile Page
 - Go to [Profile](#)
 - Click [EDIT](#) next to the Primary Contact Info section



Profile - Edit Primary Contact Info

Cancel



Email:

Phone:

Mobile Phone:

Fax:

Text Message Email: text message email address [examples](#)

A text message email address for your mobile phone. Examples ...


- Verizon: number@vtext.com
- ATT: number@txt.att.net
- Sprint: number@messaging.sprintpcs.com
- Tmobile: number@tmomail.net
- [more](#)

Save

Cancel

Built in Alerts

- All ATM – ATM transactions
 - Criteria set to ATM



Accounts | Transfers | eStatements | Bill Pay | Mobile | Alerts | Reports | More Options

Add Transaction Alert

ALERT DETAILS

Name: All ATM
This is a built-in alert and cannot be modified.
Create an editable [copy](#) of this alert.

Type: Transaction

Criteria: ATM

For Account: [REDACTED] -- CHECKING ACCOUNT [v]

Deliver: All Day - usually within 30 minutes
 Daily summaries
 Weekly summaries on Monday
 Monthly summaries on the 1st

Note: All Day alerts are processed as close to real time as possible.
Daily, Weekly, and Monthly alerts are processed starting at 1:00 AM for morning delivery.

SEND EMAIL TO

Primary: [REDACTED]

Backup: not set, to set click [here](#)

Other: email addresses, separated by commas


SEND TEXT TO

Primary: [REDACTED]

Backup: not set, to set click [here](#)

Other: text message email addresses, separated by commas, [examples](#)

- All Checks – Share Draft & ACH checks
 - Criteria set to checks
 - Set account to checking account (Note: Separate alert would have to be set up for each checking account if more than one)



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Add Transaction Alert

ALERT DETAILS

Name: All checks
This is a built-in alert and cannot be modified.
Create an [editable copy](#) of this alert.

Type: Transaction

Criteria: checks

For Account: [REDACTED] -- CHECKING ACCOUNT

Deliver: All Day - usually within 30 minutes
 Daily summaries
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Note: All Day alerts are processed as close to real time as possible.
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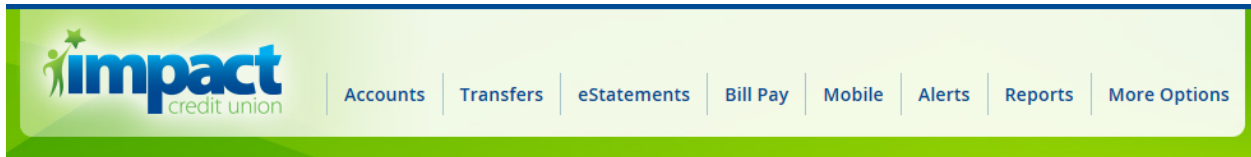
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Backup: not set, to set click [here](#)

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Custom Alerts

- Deposits – All Deposits into account including transactions done in home banking and at the credit union
 - Criteria – Deposit
 - Note: If you are looking for specific types of deposits, set criteria for a specific word that always appears in the description of the transaction (for example: payroll or ppd) and test the criteria to see if you get what you are looking for



Add Transaction Alert

ALERT DETAILS

Name:

Type: Transaction

Criteria: like [Costco over \\$10, Starbucks, or over \\$10](#) [test this criteria](#)

For Account: ▾

Deliver: All Day - usually within 30 minutes
 Daily summaries
 Weekly summaries on Monday
 Monthly summaries on the 1st

Note: All Day alerts are processed as close to real time as possible.
Daily, Weekly, and Monthly alerts are processed starting at 1:00 AM for morning delivery.

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SEND TEXT TO

Primary:

Backup: not set, to set click [here](#)

Other: text message email addresses, separated by commas, [examples](#)

- Withdrawals – Every withdrawal made to the account including ACH, shardrafts, debit and POS purchases, fees, member initiated transactions
 - Criteria – withdrawal

[Accounts](#) | [Transfers](#) | [eStatements](#) | [Bill Pay](#) | [Mobile](#) | [Alerts](#) | [Reports](#) | [More Options](#)

Add Transaction Alert

ALERT DETAILS

Name:

Type: Transaction

Criteria: [like Costco over \\$10, Starbucks, or over \\$10](#) [test this criteria](#)

For Account: -- CHECKING ACCOUNT

Deliver: All Day - usually within 30 minutes
 Daily summaries
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 Monthly summaries on the 1st

Note: All Day alerts are processed as close to real time as possible.
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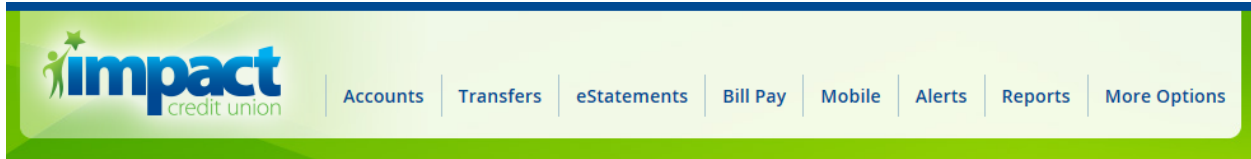
SEND TEXT TO

Primary:

Backup: not set, to set click [here](#)

Other: text message email addresses, separated by commas, [examples](#)

- Debit Purchase – All Debit Card authorizations & purchases when run as a credit
 - Criteria – Debit
 - Note: Do not set Debit Purchase as the criteria or you will not receive an alert for authorizations. You will only receive an alert when the transaction posts to your account



Add Transaction Alert

ALERT DETAILS

Name:

Type: Transaction

Criteria: like [Costco over \\$10](#), [Starbucks](#), or [over \\$10](#) [test this criteria](#)

For Account: -- CHECKING ACCOUNT

Deliver: All Day - usually within 30 minutes
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SEND TEXT TO

Primary:

Backup: not set, to set click [here](#)

Other: text message email addresses, separated by commas, [examples](#)

- POS Purchase - All Debit Card authorizations & purchases when run as a debit
 - Criteria – pos



Accounts | Transfers | eStatements | Bill Pay | Mobile | Alerts | Reports | More Options

Add Transaction Alert

ALERT DETAILS

Name: POS Purchase

Type: Transaction

Criteria: pos like Costco over \$10, Starbucks, or over \$10 [test this criteria](#)

For Account: [REDACTED] -- CHECKING ACCOUNT

Deliver: All Day - usually within 30 minutes
 Daily summaries
 Weekly summaries on Monday
 Monthly summaries on the 1st

Note: All Day alerts are processed as close to real time as possible.
Daily, Weekly, and Monthly alerts are processed starting at 1:00 AM for morning delivery.

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Backup: not set, to set click [here](#)

Other: email addresses, separated by commas

SEND TEXT TO

Primary: [REDACTED]

Backup: not set, to set click [here](#)

Other: text message email addresses, separated by commas, [examples](#)