Managing alerts

Alerts remind you of important events, warn you about the status of your accounts, and notify you when transactions occur. When you create an alert, you specify the conditions that trigger the alert as well as the way that you receive the alert. These conditions vary depending on the alert type. Alert types include:

- Date
- Account
- History
- Insufficient Funds
- Transactions
- Security

You can choose to receive Alerts in any of these ways:

- Secure Message
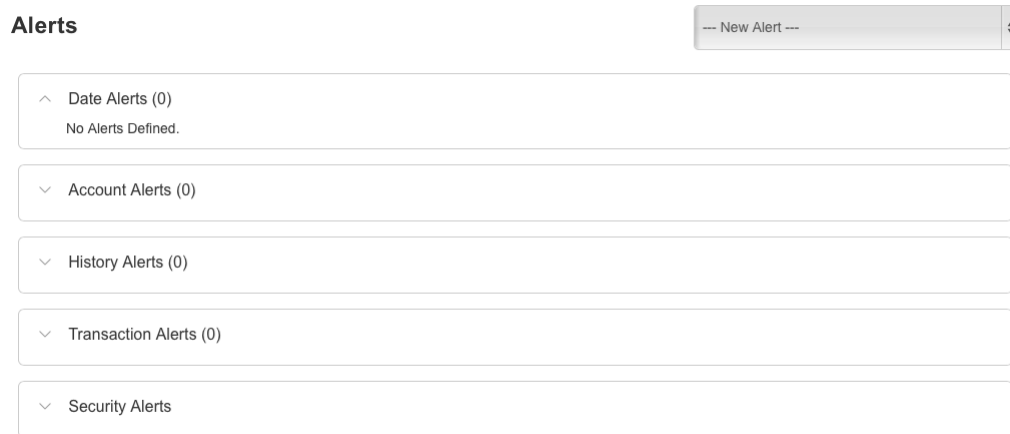- Email
- Telephone call
- Text (SMS) message

You do not need to be logged in for us to send the alert. Secure Message and email alerts are sent immediately when they are generated. You specify the time to send alerts in a telephone call or a text message.

Creating an alert

When you create an alert, it takes effect immediately and stays in effect until you disable or delete it.

To create an alert

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.

   Alerts   --- New Alert --- ▲▼

   | ^ Date Alerts (0) |
   | No Alerts Defined. |

   | ⌄ Account Alerts (0) |

   | ⌄ History Alerts (0) |

   | ⌄ Transaction Alerts (0) |

   | ⌄ Security Alerts |

2. In the **Create New Alert** drop-down list, click or tap the alert type that you want to create. The New Alert page appears.
3. Select the conditions that trigger the alert.
4. Select one of the following from the **Select a delivery method** drop-down list:
   - Select **Secure Message Only** to send the alert as a Secure Message. The alert is sent immediately when it is generated. You must be logged in to read the alert.
   - Select **Email** to send the alert as an email. Enter the email address where you want to send the alert. The alert is sent immediately when it is generated.
   - Select **Voice** to send the alert as a telephone call. Select the country from the **Select Phone Country** drop-down list, enter the phone number to call, and specify the time to call.
   - Select **SMS** to send the alert as a text (SMS) message. Select the SMS country, and enter the number and the time to send the message, and select the **Agree to Terms** check box.

5. Select the **Every Occurrence** check box to repeat the alert every time that the trigger occurs.

> **Note:** When you select Every Occurrence, a Transaction alert is sent every time the conditions match. Account, History, and Insufficient funds alerts are sent once per day.

6. Click or tap **Save**.
7. In the success message, click or tap **Close**. The new alert appears on the Alerts page.

Editing alerts

You can use the Alerts page to edit an existing alert. Any changes take effect immediately.

To edit an existing alert

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.
2. Click or tap the type of alert that you want to edit.
3. Click or tap the existing alert that you want to edit. The Edit Alert page appears.
4. Make any needed changes to the alert settings, and click or tap **Save**.
5. Click or tap **Close** on the Save Alert message.

Enabling and disabling alerts

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

To disable or enable an existing alert

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.
2. Click or tap the type of alert that you want to disable or enable.
3. 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.

Deleting an alert

You can use the Alerts page to delete an alert that you no longer need. Deleting an alert removes it immediately and permanently.

To delete an alert

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.
2. Click or tap the type of alert that you want to delete.
3. Click or tap the existing alert that you want to delete. The Edit Alert page appears.
4. Click or tap **Delete**.
5. When prompted, click or tap **Confirm** to delete the alert.
6. When the delete is complete, a message appears. Click or tap **Close.**

Configuring security alerts

Security alerts inform you immediately when a security-related event occurs. Some security alerts are required. In the list of security alerts, required alerts are dimmed. You can enable or disable optional security alerts. The available security alert types vary, depending on your account type.

When an enabled alert is triggered, we send a security alert message. Security alerts are always sent as secure messages. You can add additional delivery methods. When a security alert is triggered, the alert is sent to all of the configured delivery methods.

You should not rely on email alerts alone, since email can be delayed or interrupted. Always use a second delivery method along with email for greater security.

To enable or disable optional security alerts

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.
2. Click or tap **Security Alerts**. The list of available alerts appears.
3. Do one of the following:
   - To enable an alert, click or tap **On**.
   - To disable an alert, click or tap **Off**.
4. On the Save Alert page, click or tap **Close**.

To edit security alert delivery preferences

1. In the Menu, click or tap **Settings > Alerts**. The Alerts page appears.
2. Click or tap **Security Alerts**.
3. Click or tap **Edit Delivery Preferences**. The Delivery Preferences page appears.

Delivery Preferences

PHONE NUMBER
COUNTRY

United States

AREA CODE   **PHONE NUMBER**

SMS TEXT NUMBER
COUNTRY

United States

AREA CODE   **PHONE NUMBER**

NOTE: SMS Text Message: 1 msg/transaction, Msg&Data Rates May Apply

Cancel   Save

4. Do the following:
   a. In the **E-Mail Address** field, enter the email address to receive security alerts.
   b. In the Phone Number area, select the destination from the **Country** drop-down list and enter the phone number and extension to call in the **Area Code**, **Phone Number**, and **Ext.** fields.
   c. In the SMS Text Number area, select the destination country from the **Country** drop-down list, and enter the phone number to send the message to in the **Area Code and Phone Number** fields.
5. On the Delivery Preferences page, click or tap **Save**. A success message appears.