

Account Alerts

Accounts → Account Alerts

The Account Alerts screen is used to create alerts notifying you of specific account information.

ALERTS						ALERT OPTIONS	
						Create New Alert	
						Edit SMS Alert Times	
						Phone (316) 644-3506	
						Receive SMS 7:00 AM - 6:00 PM CST	
NAME	ACCOUNT	TYPE	DELIVERY	STATUS			
Car Loan	Mazda Loan	6 days prior to loan payment due date	Email	Active	Options		
Low Account Balance	Charles Checking	Account Balance Less Than \$100.00	Email	Active	Options		

To create a new alert:

1. Click *Create New Alert*.

ACCOUNT ALERT

TYPE
Account Balance ▼

NAME
Susan Banker

CHECKING Charles Checking \$152,442.69 ▼

WHEN ACCOUNT BALANCE
Greater Than ▼ AMOUNT
500.00

SEND EMAIL EMAIL ADDRESS

SEND SMS Send SMS Alert to Phone: XXXXXXXXXX

Active

Alert emails are **NOT** encrypted and may be viewed by third parties.
Do not include any private information in your 'Alert Name'

Cancel Submit

2. Select the type of alert. *Options are:*
 - a. Account Balance
 - b. CD Maturity Date
 - c. Loan Payment Due Date
 - d. Pending Transactions
3. Enter a name for the alert.
4. Select the account the alert is associated with.
5. Based on the type of alert, different fields display. Complete the displayed fields.
 - a. Account Balance Alert – Indicate if the alert should be prompted when the balance is greater than or less than the indicated dollar value.

- b. CD Maturity Date – Indicate the number of days prior to the maturity date the alert should be sent.
 - c. Loan Payment Due Date – Indicate the number of days prior to the loan payment date the alert should be sent.
 - d. Pending Transactions – No extra fields display.
6. Indicate if you would like to have the alert sent via SMS/Text and/or Email.
NOTE: *The phone number will default from the Text Banking section.*
 7. Indicate if the alert is Active or Inactive. By default, the alert is set to Active once the alert is created. To inactivate the alert, click **Active** and the status will then change.
 8. Click **Submit**.

To edit an alert:

1. Click *Options*.
2. Click Edit Alert.
3. Make changes as needed.
4. Click **Submit** to save changes. Click **Cancel** to return to the Alerts screen.

To delete an alert:

1. Click *Options*.
2. Click Delete Alert.

Click **OK** to delete the alert. Click **Cancel** to return to the Alerts screen.

SENSITIVE DATA