ONLINE BANKING ALERTS

A GUIDE TO ACTIVATING DIGITAL ALERTS ON YOUR COMPUTER OR MOBILE DEVICE



BAKER BOYER

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LOGIN ALERTS

Login alerts will notify you any time there has been a change to your account settings. The default setting for alerts is "off." You can customize which alerts you would like to receive.

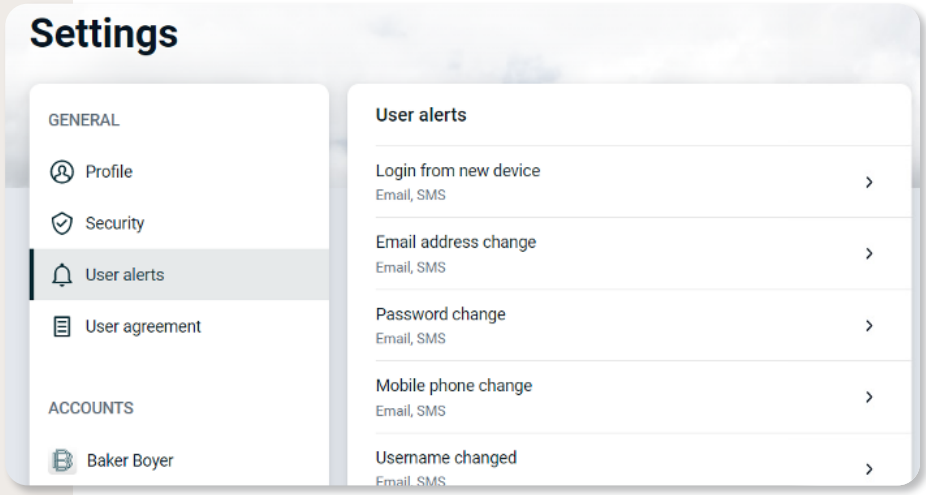
1 To add login alerts, click "your name" in the bottom left-hand side of the screen. Then, select settings. This will take you to your profile.

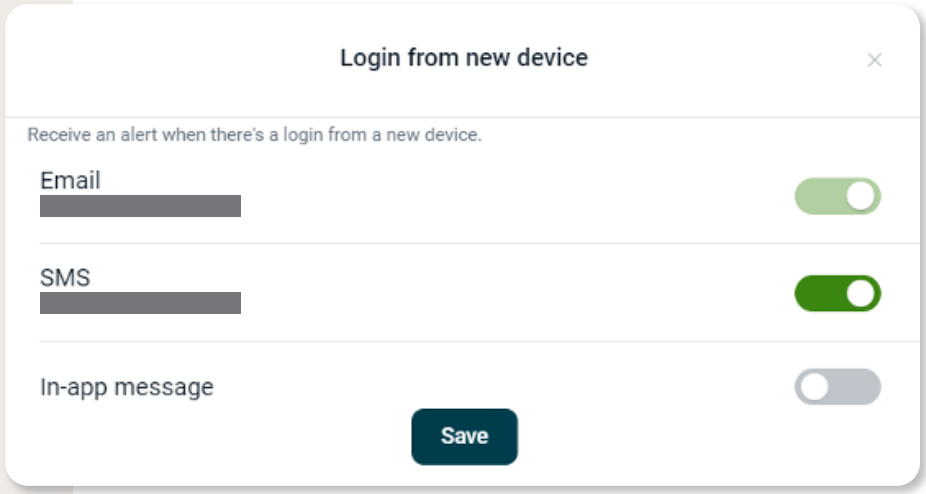
2 Select the option "User alerts."

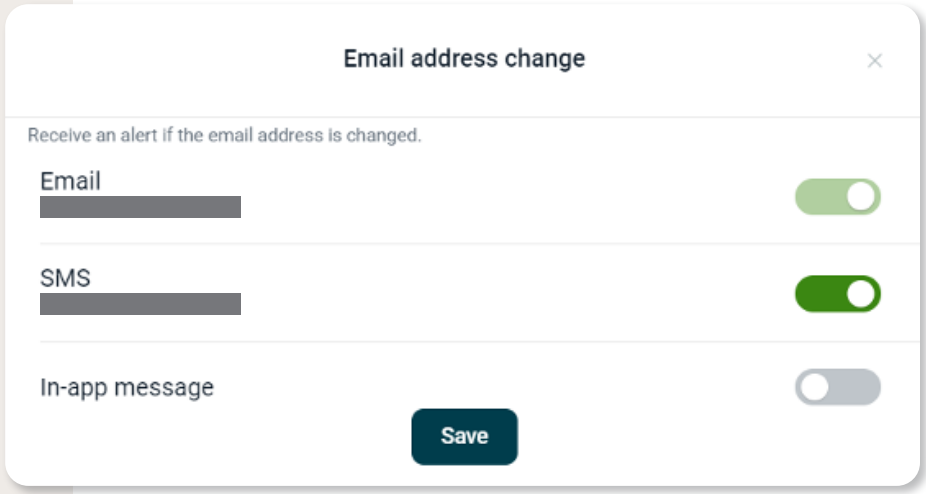
There are five different alerts that you can activate with the green toggle buttons on the right. You can also select how you would like to receive the alerts—via email or SMS text message.

A Login from new device – Sends an alert when a new device (computer, mobile device, etc) logs into the Online Banking System.

B Email address change – Sends an alert when the email address is updated.







LOGIN ALERTS
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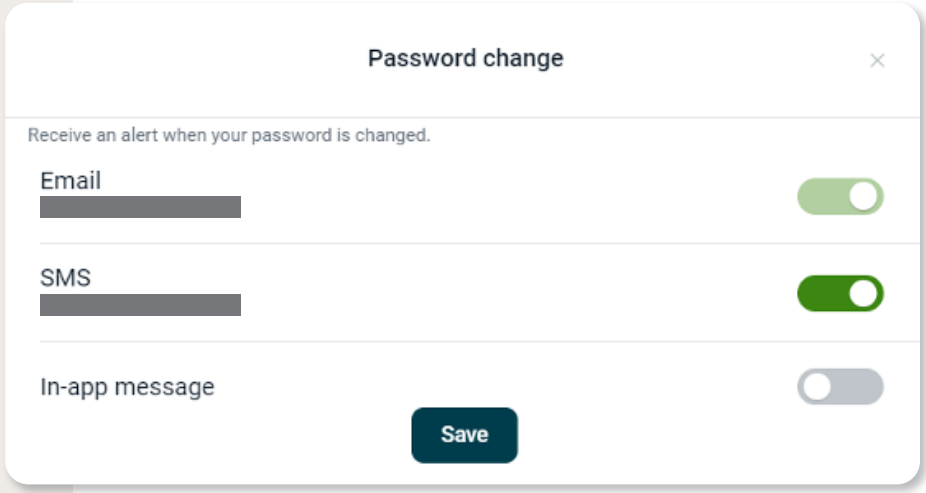
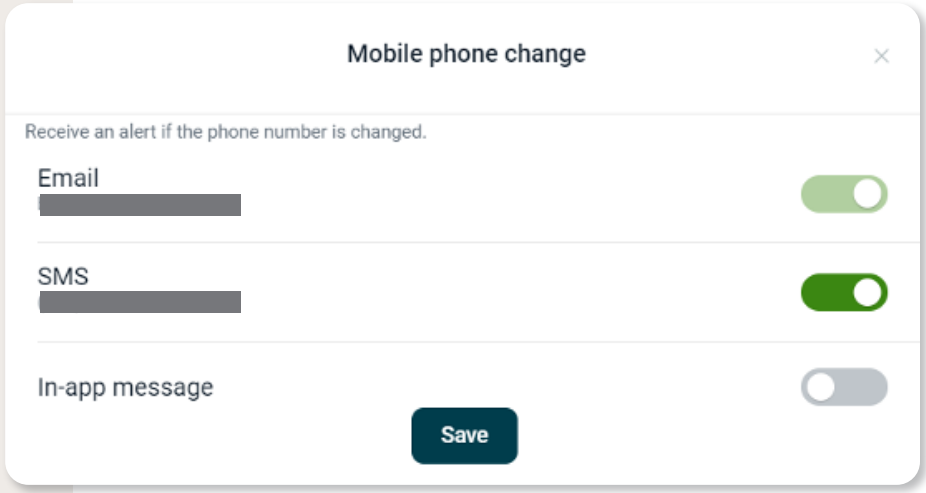
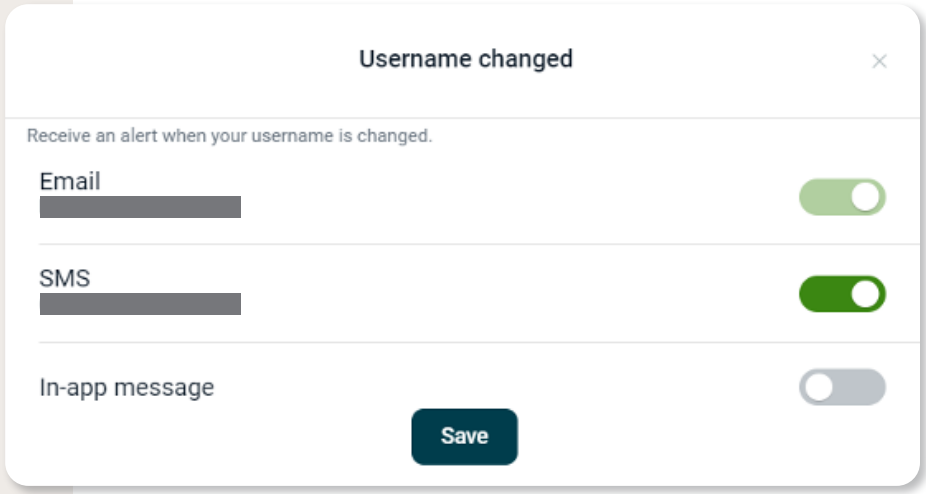
C Password change – Sends an alert when the password is updated.



D Mobile phone change – Sends an alert when the mobile phone number is updated.



E Username change – Sends an alert when the username is updated.



LOGIN ALERTS
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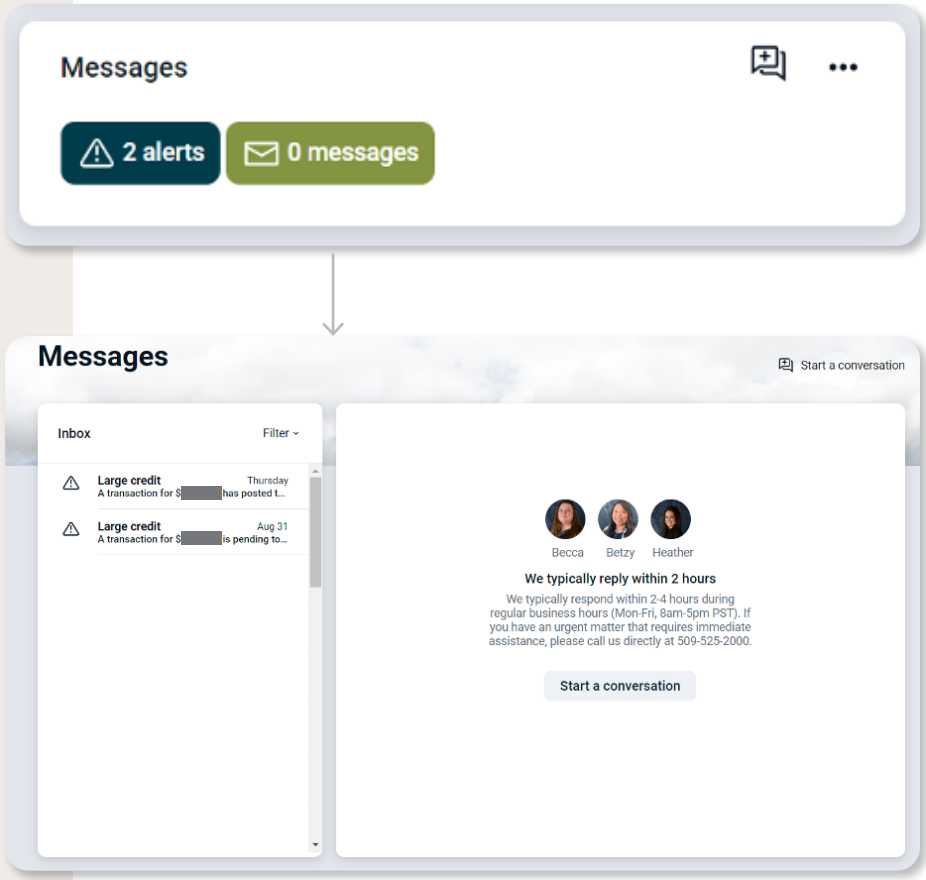
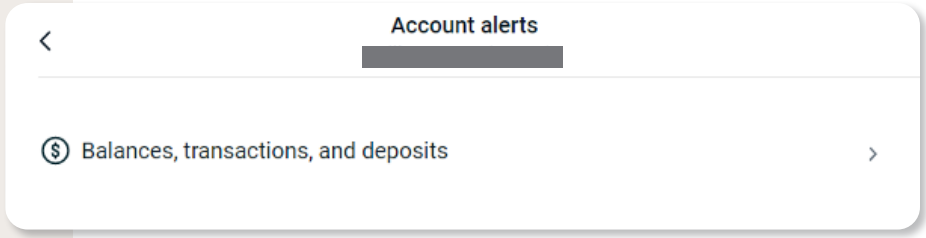
When new alerts are triggered in the Online Banking System, they will be listed in the messages tile.



TRANSACTION ALERTS

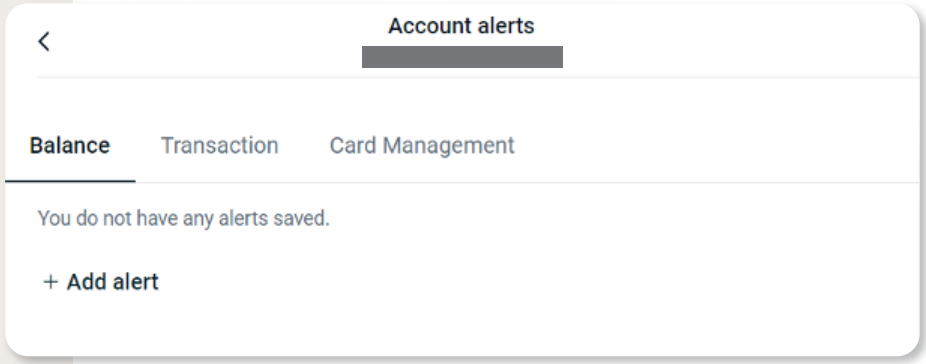
1. Select the account you would like to place the alert on either by clicking on the account on the dashboard or by clicking “Accounts” from the main menu on the left side of the screen.

2. Click the button labeled “Alert Preferences.” One option will appear for Balances, transactions, and deposits.

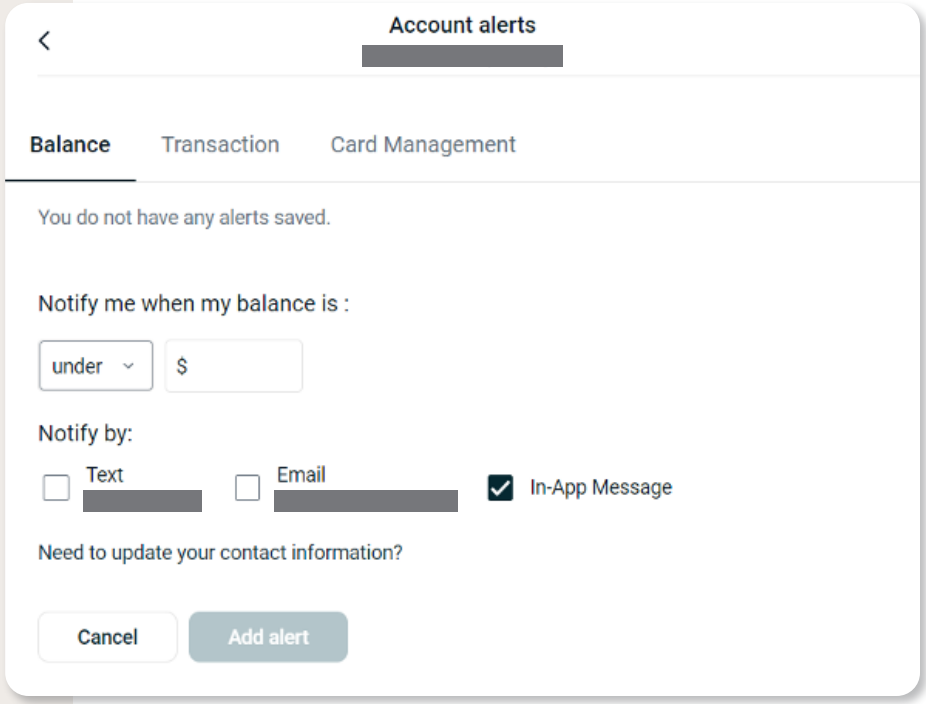


A. Balance – Allows you to create an alert sent at the end of the business day when the balance drops below or goes above a certain dollar amount.

Click “Add alert” to add a balance alert.



Use only whole dollar amounts, then select method: text message alerts, email alerts or in-app messages (push alerts) and click “Add alert” to submit the change.



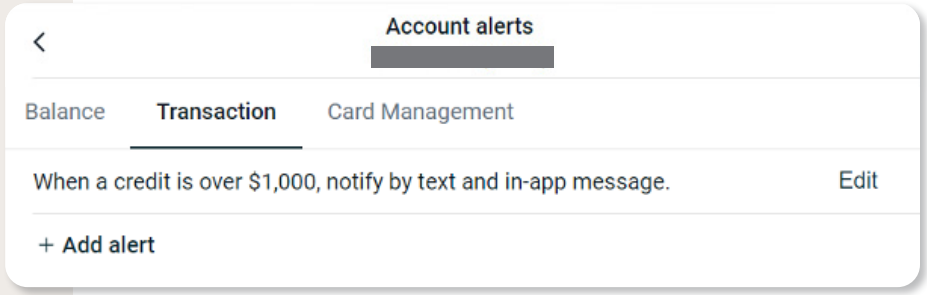
TRANSACTION ALERTS
CONTINUED

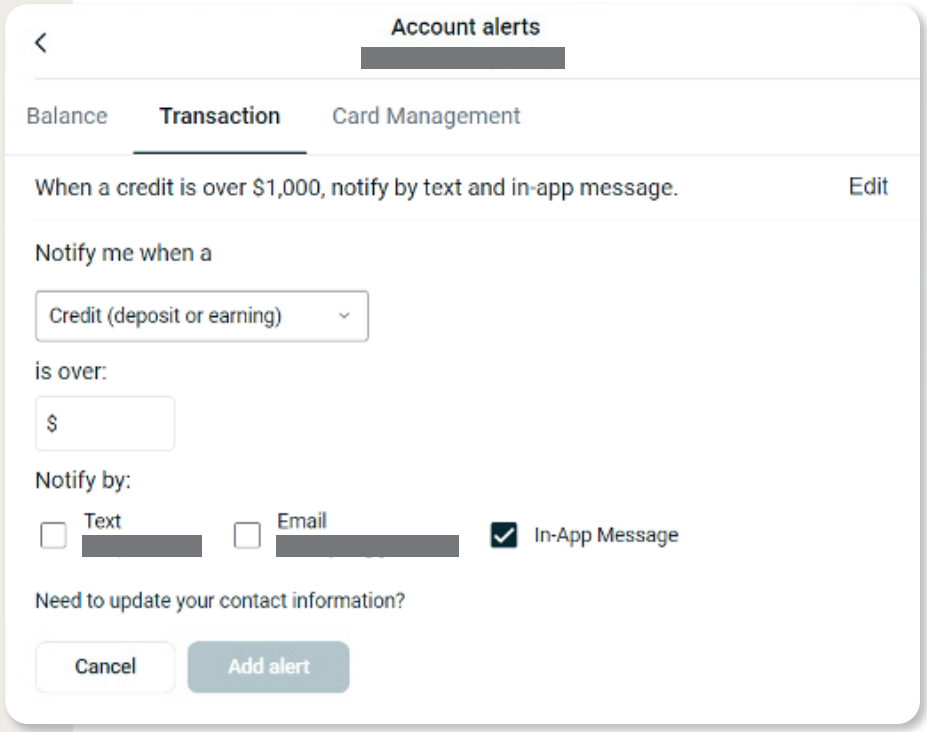
B

Transaction – Allows you to create an alert for specific transactions based on amount or type. Click "Add alert" to add a transaction alert. Use only whole dollar amounts, then select method: text message alerts, email alerts or in-app messages (push alerts) and click "Add alert" to submit the change.

Email and text alerts will be sent when the transaction posts to the account, typically next day.

Push alerts will be generated when the transaction occurs and affects current balance.





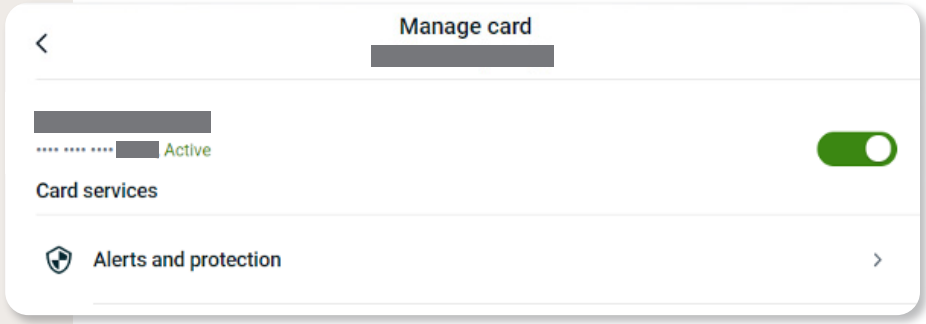
CARD MANAGEMENT

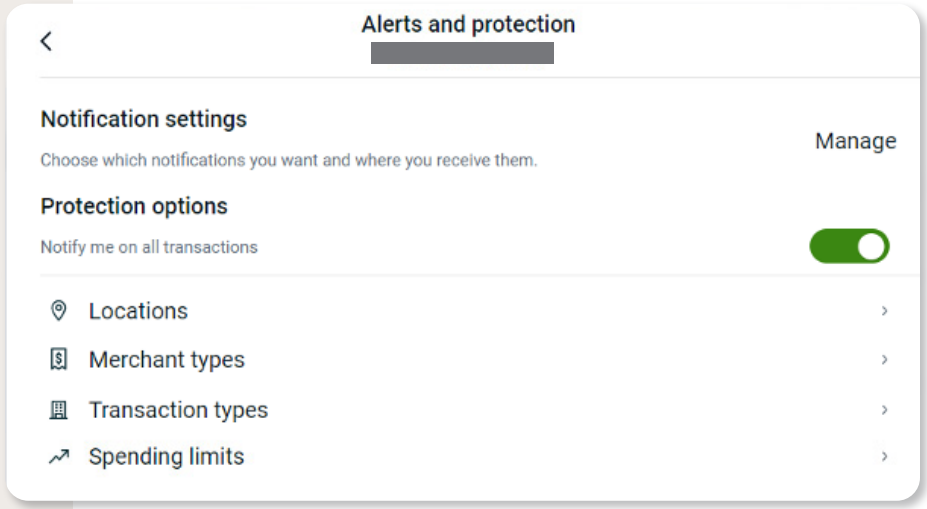
1. From Dashboard, locate tile titled "Card Management."

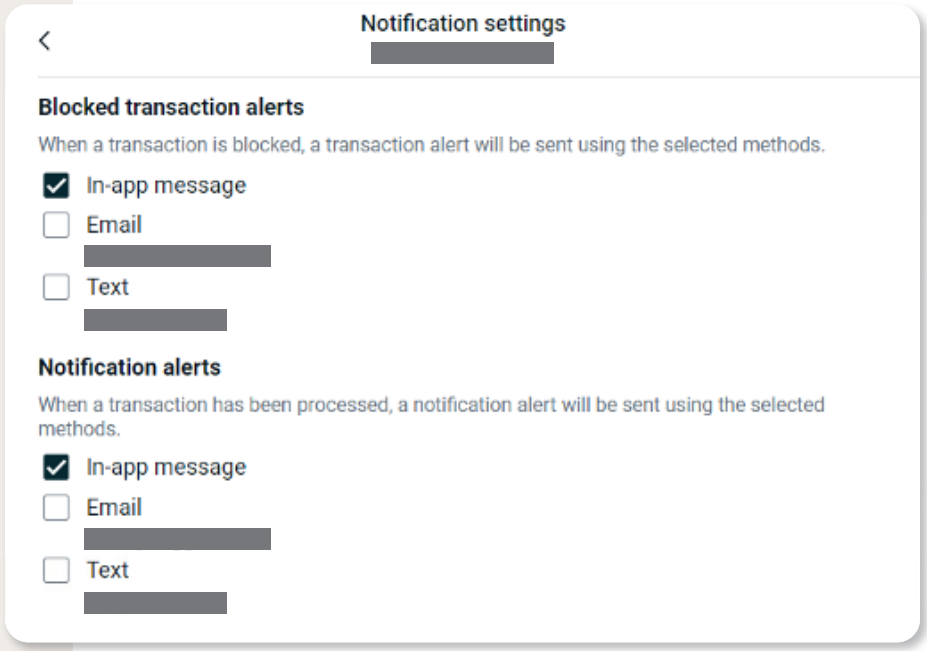
2. Click the card you would like to place the alert on. Once in the "Manage card" menu, you will see a green toggle to the right of the card information. This toggle can temporarily suspend the card when turned on.

3. Click "Alerts and protection" for the menu of alert options

   - **A** Notification settings – Allows you to set up the notification method for receiving alerts: in-app messages (push alerts), emails or text messages. Click "Manage" to set notifications.
   - **B** Blocked transaction alerts – Transactions that were blocked from being withdrawn from your account.
   - **C** Notification alerts – Courtesy notification about a transaction that took place on the selected card. This does not stop transaction from processing.
   - **D** Once methods are selected, click "Save."







CARD MANAGEMENT
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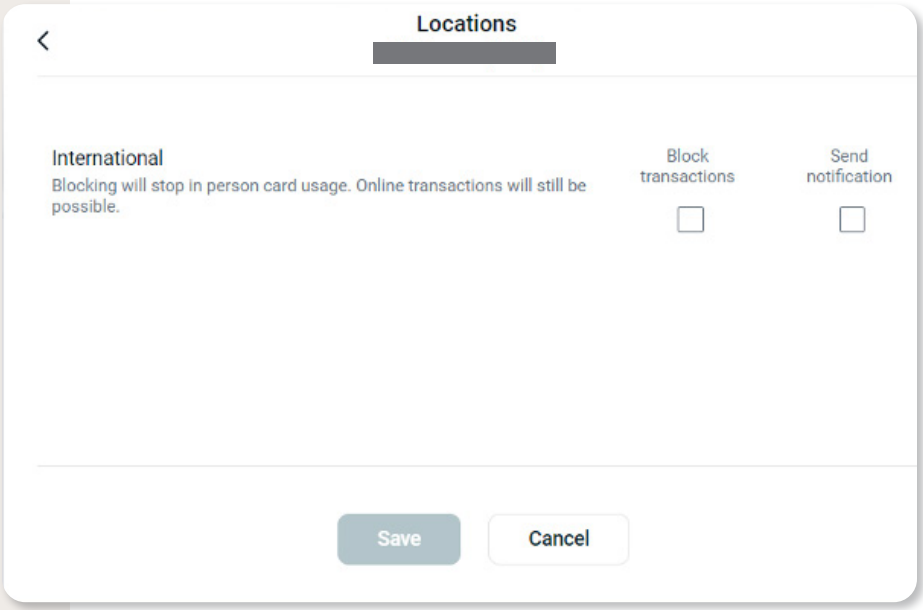
4 When you return to the Alerts & Protection screen, the option for "Protection options" turns on notifications for all transactions completed on the selected debit card.

Note: This can be turned off by clicking the toggle. A message will appear briefly in the lower left-hand corner of the screen "Your settings were saved successfully." There may be a delay of a couple seconds before this appears.

5 Locations: Notifications based on where the debit card is used.

A International – Block all international in-person transactions or send notification when one occurs. Check the box for preferred notification method.

B Click "Save."

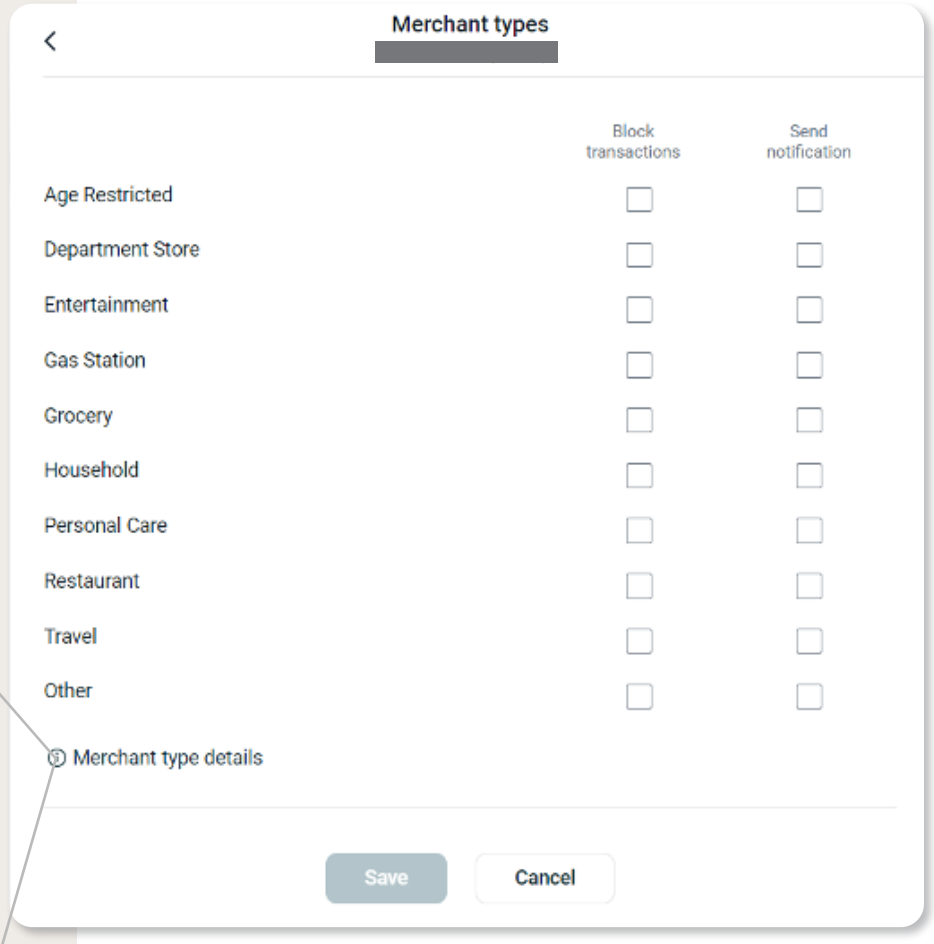


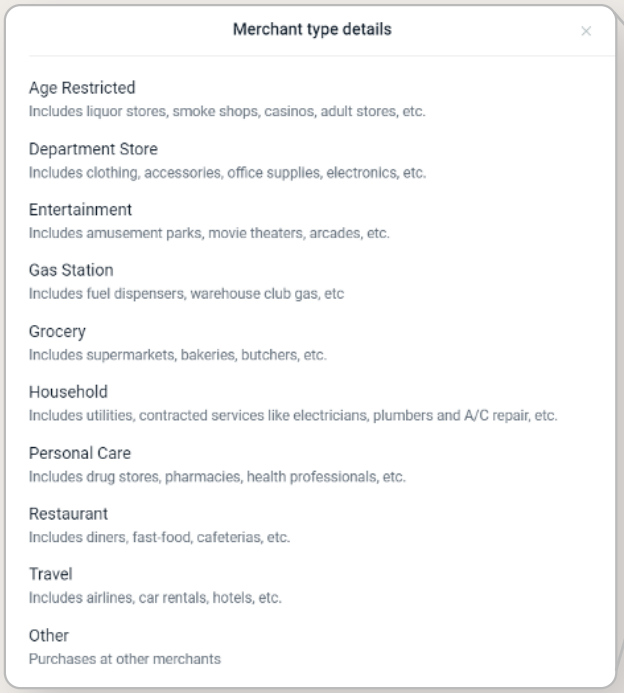
CARD MANAGEMENT
CONTINUED

6 Merchant types — Block specific merchant types or send notifications when a specific merchant type processes a transaction

A For details on the types click on the “Merchant type details” button.

B Click “Save.”



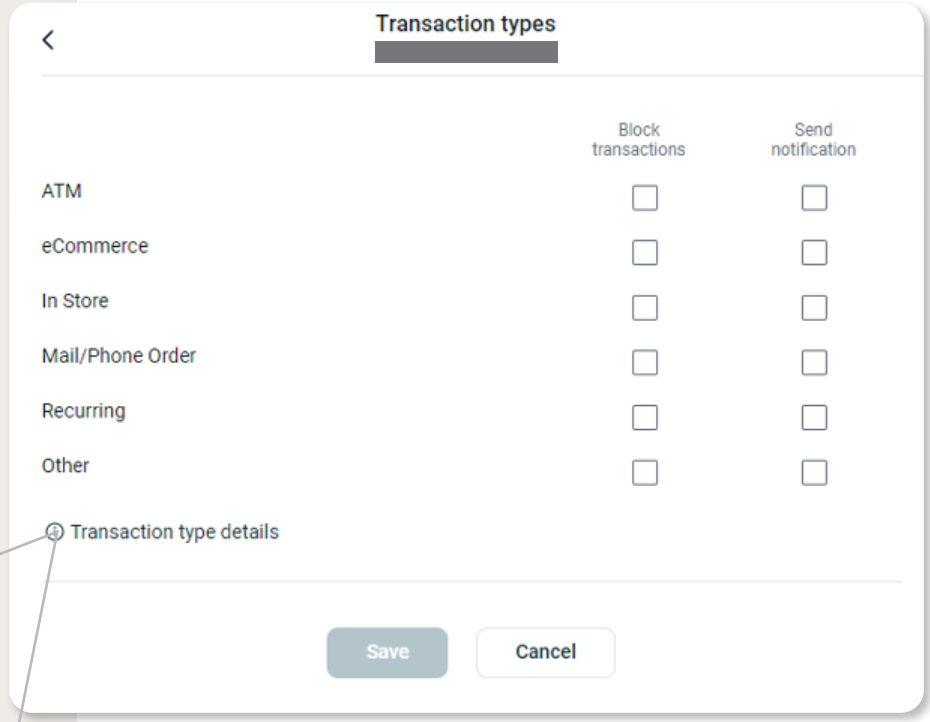


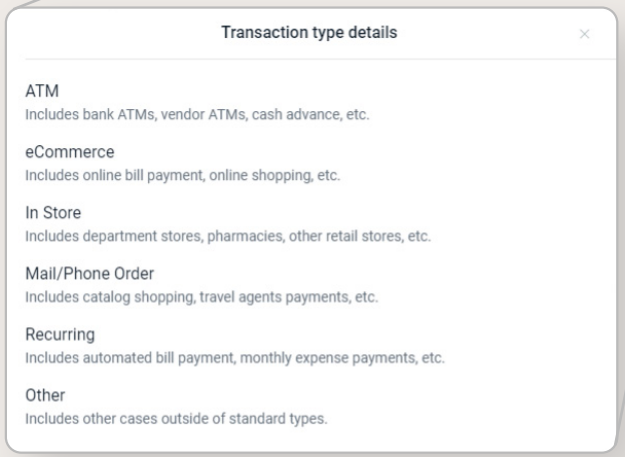
CARD MANAGEMENT
CONTINUED

7 Transaction Types – Block specific types of transactions or send notifications when a specific type of transaction is processed.

A For details on the various types of Transactions, click on the "Transaction type details" button.

B Click "Save."





CARD MANAGEMENT
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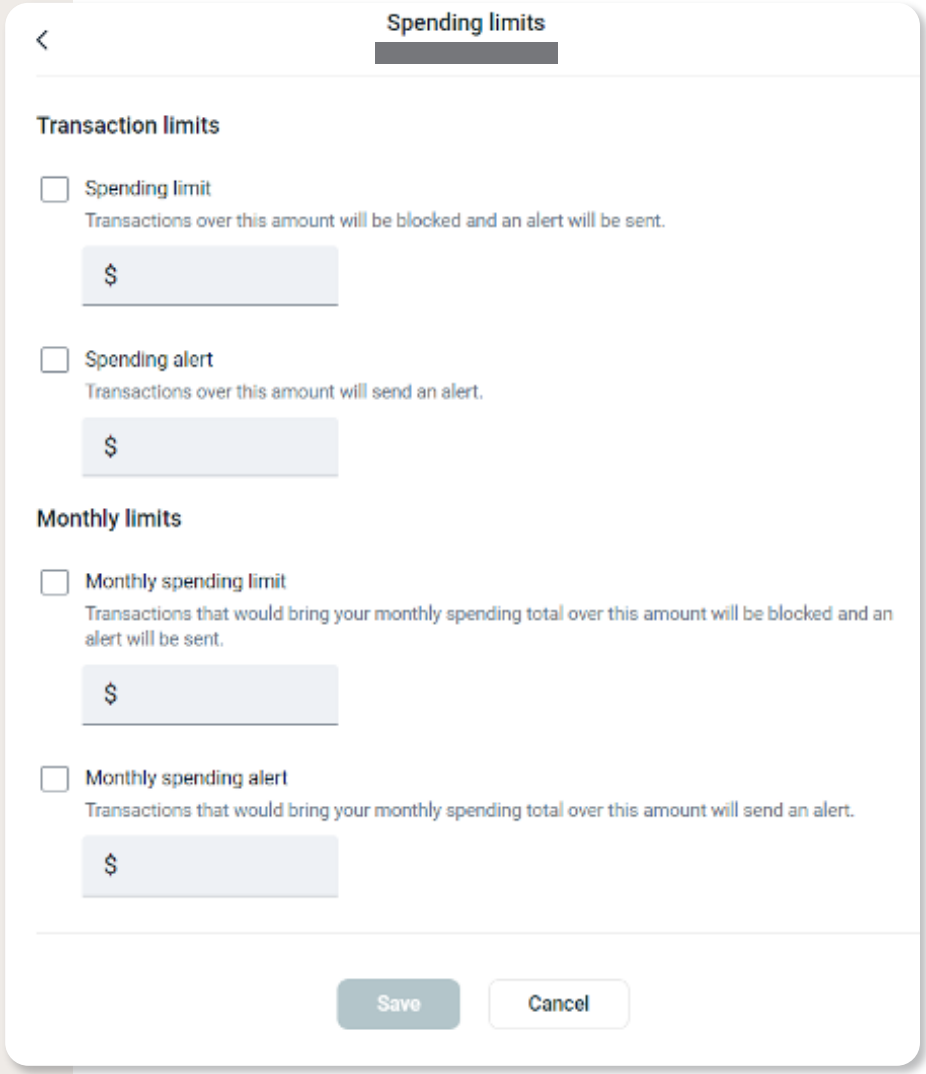
8

Spending limits – Block amounts that are outside of the established limits or send notifications when transactions that exceed the limit occur.

Set individual transaction limits and alerts.

Set monthly transaction limits and alerts.

Click “Save.”



Additional Information on Spending Limits

Clients have the option to add custom alerts and limits to their debit cards.

The spending limit is a hard limit that will decline transactions that exceed the limit. While these can be set to any dollar amount, they will not override the limits set by the bank. Should clients need limits adjusted beyond the bank limits, they will need to contact their Advisor or a Universal Banker. Exceptions for debit card limits can be temporary or permanent depending on client need.

Spending alerts will notify clients of, but not stop, transactions that exceed a specific dollar amount. These alerts are delivered via text message, email and/or as a push alert from the mobile app.

For additional questions, please reach out to Baker Boyer Online Support.