e-Alerts Setup Guide

ENROLLING IN E-ALERTS

Before you can set any e-Alerts on your accounts, you need to enroll in the e-Alerts module from within your WebDirect Online Banking account.

To enroll in e-Alerts:

1. Log in to the WebDirect Online Banking application
2. Click on the **Manage your e-Alerts** link on the Account Summary page
3. The *e-Alert Enrollment* screen displays, listing all available e-Alerts. After reading the contents of this window, click **Enroll** to continue.
4. The *Email Address* screen displays. Type your Primary e-mail/text Address and a Secondary e-mail/text Address (optional) in the boxes. Click **Next**.
5. The *Manage e-Alerts* screen displays. You have now successfully enrolled for e-Alerts.

E-ALERTS AVAILABLE

The following e-Alerts can be added on your account(s):

- Account Balance
- Check Cleared
- Withdrawal Transaction
- Deposit Transaction
- Email Change
- Name/Address Change
- Loan Payment Reminder
- Daily Checking Account Balance

E-Alerts will be sent at approximately 8:00am, 12 Noon and 5:00pm CST

ACCOUNT BALANCE ALERT

The Account Balance Alert will notify you when the balance in one of your share accounts falls between a certain minimum or maximum amount. You can specify either a maximum balance, minimum balance or both. When the account goes above or below one of these amounts, you will be sent a notification.

To create an Account Balance Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Account Balance** alert
3. Click **Next.** The *Account Balance Alert* screen will display.
4. Click the down arrow next to the *Account* drop-down box and click to select the Share or Loan ID you want to set the Alert on.
5. In the box next to the *Minimum Balance Amount* prompt, type the minimum balance amount at which you want to be notified.
6. In the box next to the *Maximum Balance Amount* prompt, type the maximum balance amount at which you want to be notified.
7. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
8. Review the Alert information and if correct, click **Finish**.

CHECK CLEARED ALERT

The Check Cleared Alert will allow you to be notified when a check or range of checks have been paid from your checking account. You can specify a check number or a range of check numbers. When the check has been paid from the checking account, you will receive a notification.

To create a Check Cleared Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Check Cleared** alert
3. Click **Next**. The *Check Cleared Alert* window displays.
4. Click the down arrow next to the *Account* drop-down box and click to select the Checking Share ID.
5. In the box next to the *Alert 1*: *Starting Check* prompt, type the number of the **Starting Check.**
6. In the box next to the *Ending Check* prompt, type the number of the **Ending Check** (if applicable). *Note*: Five different check clearing alerts can be set.
7. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
8. Review the Alert information and if correct, click **Finish**.

WITHDRAWAL TRANSACTION ALERT

The Withdrawal Transaction Alert will allow you to be notified when a withdrawal in one of your share accounts exceeds a certain amount. When a withdrawal to the share account exceeds this amount, you will receive a notification.

To create a Withdrawal Transaction Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Withdrawal Transaction** alert
3. Click **Next**. The *Withdrawal Transaction Alert* window displays
4. Click the down arrow next to the *Account* drop-down box and click to select the Share ID.
5. At the *Withdrawal Transactions that exceed* prompt, type the amount at which you want to be notified
6. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
7. Review the Alert information and if correct, click **Finish**.

DEPOSIT TRANSACTION ALERT

The Deposit Transaction Alert will allow you to be notified when a deposit in one of your share accounts exceeds a certain amount as shown below. When a deposit to the share account exceeds this amount, you will receive a notification.

To create a Deposit Transaction Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Deposit Transaction** alert
3. Click **Next**. The *Deposit Transaction Alert* window displays.
4. Click the down arrow next to the *Account* drop-down box and click to select the Share ID.
5. At the *Deposit Transactions that exceed:* prompt, type the amount at which you want to be notified
6. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
7. Review the Alert information and if correct, click **Finish**.

EMAIL CHANGE ALERT

This alert will send a message to you when the e-mail address on your account has been changed. A message will be sent to both the old and new e-mail addresses notifying of the change.

To create an Email Change Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Email Change** alert
3. Click **Next**. The *Email Change* window displays.
4. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
5. Review the Alert information and if correct, click **Finish**.

NAME/ADDRESS CHANGE ALERT

This alert is similar to the Email alert, in that it will send a message alerting you to changes to your name record. If your name, address or telephone number is changed on your account, an alert is sent notifying you of this change.

To create a Name Address Change Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Name/Address Change** alert.
3. Click **Next** to confirm the alert. The *Name/Address Change* screen displays.
4. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
5. Review the Alert information and if correct, click **Finish**.

LOAN REMINDER ALERT

The Loan Reminder Alert will notify you when a loan payment is coming due. You can specify the number of days (1 through 45) in advance you want to be notified of the payment due date.

To create a Loan Reminder Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add E-Alert* screen, click the down arrow of the drop-down box to select the **Loan Reminder** alert
3. Click **Next**. The *Loan Reminder Alert* window displays.
4. Click the down arrow next to the *Account* drop-down box and click to select the Loan ID.
5. In the box next to the *Number of days in advance to notify of Payment Due Date* prompt, type the number of days (1 through 45) in advance you'd like to be notified of your payment due date.
6. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
7. Review the Alert information and if correct, click **Finish**.

DAILY CHECKING BALANCE ALERT

The Daily Checking Balance Alert will allow you to be notified of the balance in your checking account. When the daily alerts are sent, you receive a notification.

To create a Daily Checking Balance Alert:

1. At the *Manage e-Alerts* screen, click **Add Alert**
2. At the *Add e-Alert* screen, click the down arrow of the drop-down box to select the **Daily Checking Balance** alert
3. Click **Next**. The *Daily Checking Balance Alert* window displays.
4. Click the down arrow next to the *Account* drop-down box and click to select the Share ID.
5. In the *Alert Times* box, type the time you'd like to be notified of the balance in that account.
6. Click **Next**. The *e-Alert Setup Confirmation* screen displays.
7. Review the Alert information and if correct, click **Finish**.