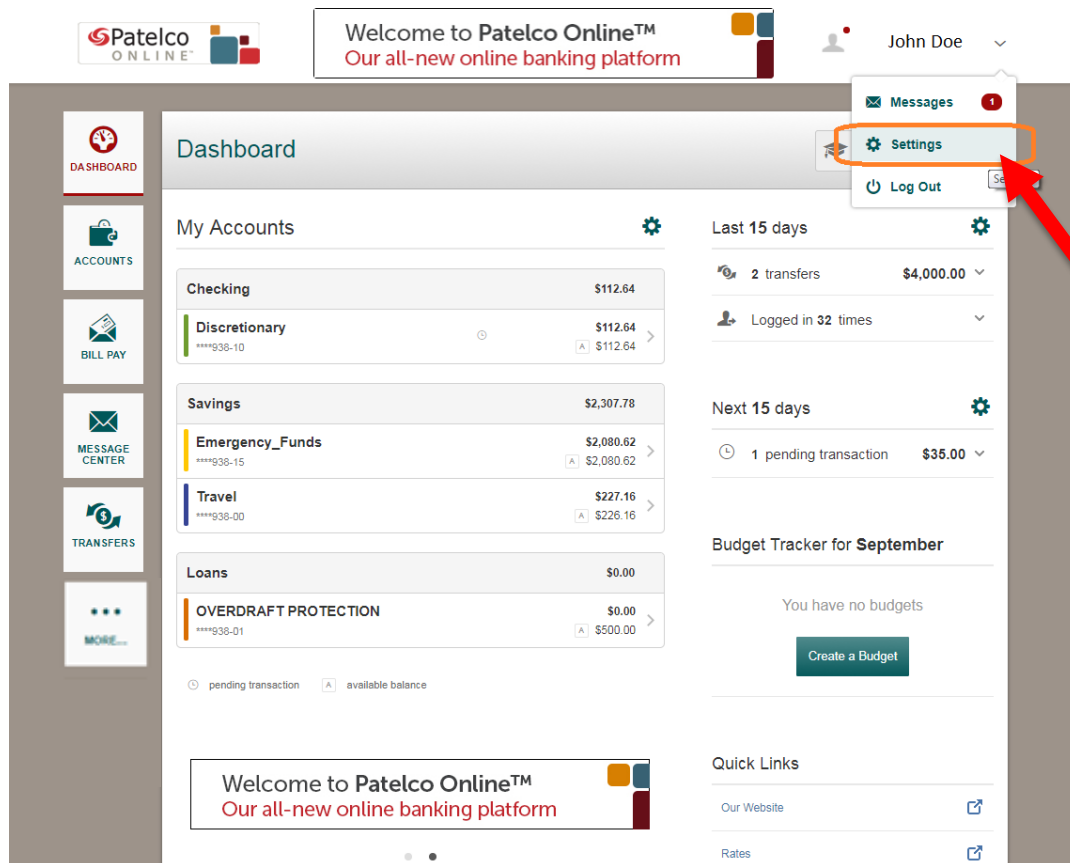


Setting Up Alerts

Patelco Online makes it easy to stay connected with your money 24/7 using Alerts. They're easy to set up, and they help keep you informed and keep your accounts safe

1. To get started, select the down arrow in the upper right corner
2. Select **Settings**



Setting Up Alerts

3. Select the **Notifications** tab

The screenshot shows the Patelco Online interface. At the top, there is a header with the Patelco Online logo, a welcome message "Welcome to Patelco Online™ Our all-new online banking platform", and the user name "John Doe". Below the header is a navigation bar with tabs for "Profile", "Security", "Themes", "Widgets", "Contact", "Notifications", and "Accounts". The "Notifications" tab is highlighted with an orange box, and a red arrow points to it from the right. The main content area is titled "Settings" and contains a table of notification settings.

Category	Alert Name	Account(s)	On/Off	Settings
Accounts	Transaction Alert		<input type="checkbox"/>	
	Balance Summary Alert		<input type="checkbox"/>	
	Balance Alert	1 account	<input type="checkbox"/>	
	Automatic Withdrawal Alert	1 account	<input type="checkbox"/>	
	Automatic Deposit Alert		<input type="checkbox"/>	
	Check Cleared Alert	1 account	<input type="checkbox"/>	
	Insufficient Funds Alert		<input type="checkbox"/>	
	Loan Payment Due Alert		<input type="checkbox"/>	
	Direct Deposit Alert		<input type="checkbox"/>	
	Transfers	Transfer Fails		<input type="checkbox"/>

Setting Up Alerts

4. You can choose to get alerted about specific transaction amounts, account balances, account overdrafts, cleared checks, and more

Setting Up Alerts

Patelco Online™ has over a dozen different Alerts, each with customization options—so you get exactly the information you want, when you want it

Set up this Alert	...to get notified
Transaction Alert	when a credit or debit is made over a certain amount, under a certain amount, or exactly a specified amount.
Balance Summary Alert	with a summary of your balances, according to your desired timing and frequency (weekly or daily), and your chosen account(s).
Balance Alert	when the balance of your chosen account(s) goes above or below a specified amount.
Automatic Withdrawal Alert	when an automatic withdrawal is made from your chosen account(s).
Automatic Deposit Alert	when an automatic deposit is made to your chosen account(s).
Check Cleared Alert	when checks clear from your chosen account(s). You can specify all checks, specific check number(s), a specific amount, or a range of amounts.
Insufficient Funds Alert	when the balance on your chosen account(s) drops below zero.
Loan Payment Due Alert	a certain number of days before, or after, your loan due date.
Direct Deposit Alert	when you get a direct deposit to your chosen account(s).
Transfer Fails Alert	whenever one of your transfers fails.
Budget Summary Alert	with a summary of your current budget. (To get this alert, set up a budget first.)
Budget Category Exceeded Alert	when you've exceeded your spending in a particular category. (To get this alert, set up a budget first.)
Budget Exceeded Alert	when you've exceeded your spending for your entire budget. (To get this alert, set up a budget first.)
Goal Endangered Alert	when you're behind on your savings goal. (To get this alert, set up a savings goal first.)
Goal Completed Alert	when you've reached a savings goal .
Online Banking Access Alert	each time your User ID is used to log in to online banking.

Setting Up Alerts

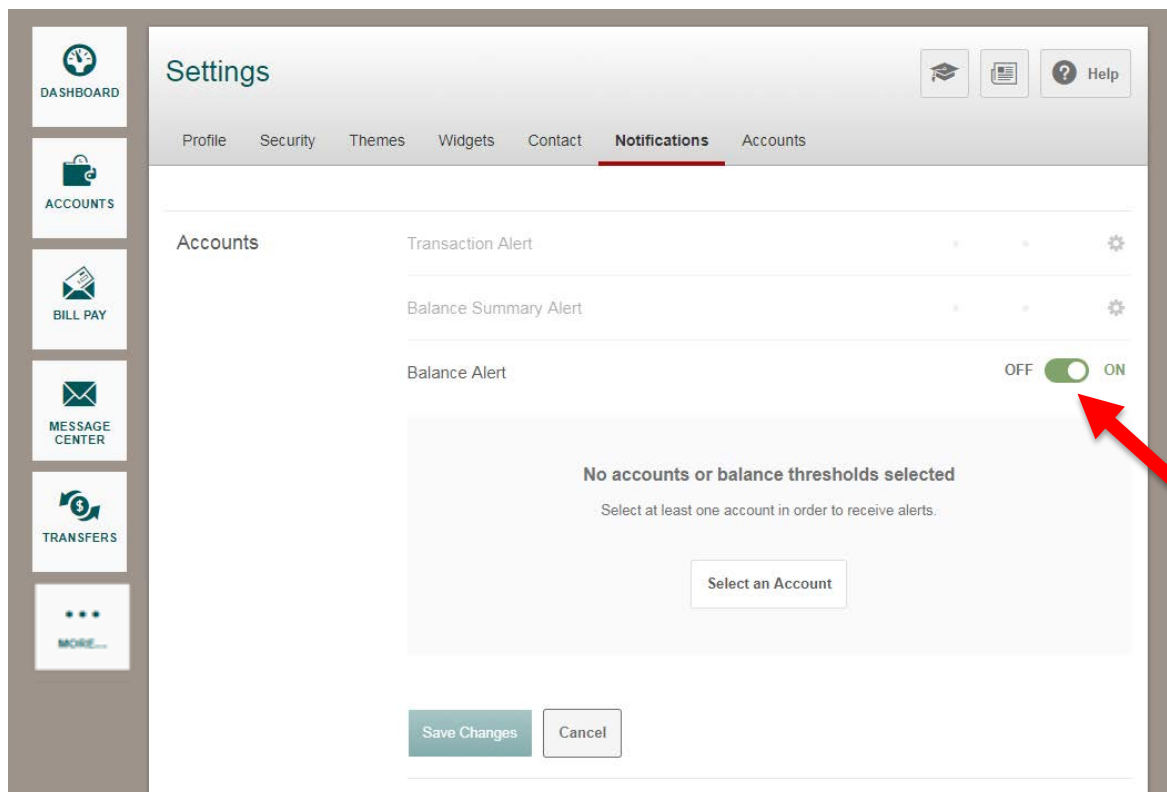
5. To create a new alert, select the gear icon next to the alert name

The screenshot shows the Patelco Online interface. At the top, there is a header with the Patelco Online logo, a welcome message "Welcome to Patelco Online™ Our all-new online banking platform", and the user name "John Doe". Below the header is a navigation bar with tabs for "Profile", "Security", "Themes", "Widgets", "Contact", "Notifications" (which is selected), and "Accounts". On the left side, there is a sidebar with icons for "DASHBOARD", "ACCOUNTS", "BILL PAY", "MESSAGE CENTER", "TRANSFERS", and "MORE...". The main content area is titled "Settings" and contains a table of alerts. The table has columns for the alert name, the number of accounts it applies to, and a gear icon for settings. A red arrow points to the gear icon for the "Balance Alert" row.

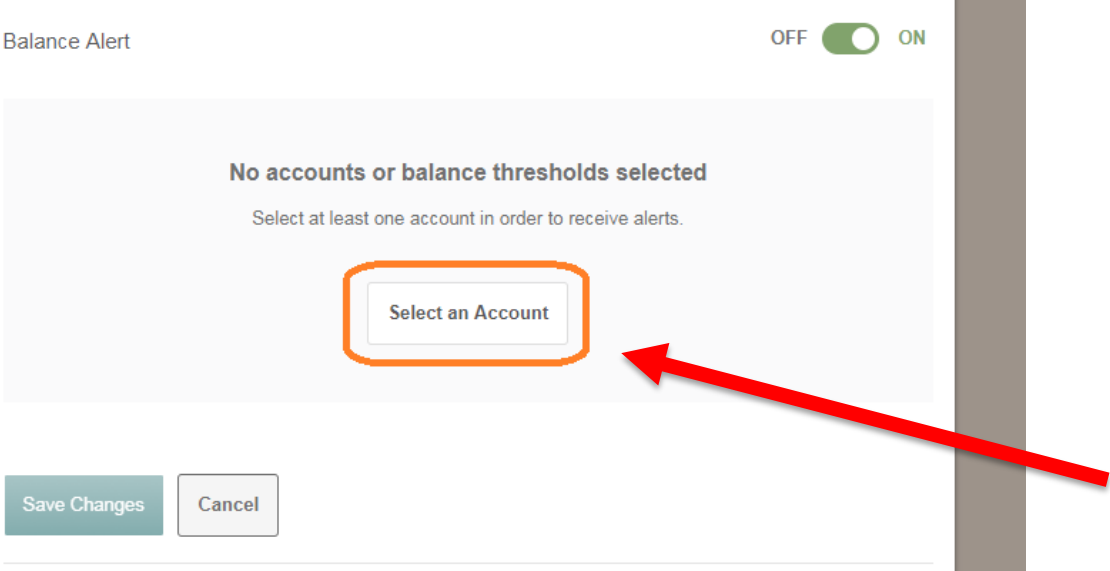
Alert Name	Accounts	Settings
Transaction Alert		⚙️
Balance Summary Alert		⚙️
Balance Alert	1 account	⚙️
Automatic Withdrawal Alert	1 account	⚙️
Automatic Deposit Alert		⚙️
Check Cleared Alert	1 account	⚙️
Insufficient Funds Alert		⚙️
Loan Payment Due Alert		⚙️
Direct Deposit Alert		⚙️
Transfer Fails		⚙️

- 6. For instance, here's how to set up a **Balance Alert**. A **Balance Alert** will notify you when a balance of a specific account goes above or below an amount that you choose

After selecting the gear icon next to **Balance Alert**, turn the alert **ON**



7. Then, choose **Select an Account**



8. Enter the amounts you want to get alerts about

For example, if you want to know when your checking account balance falls below \$100, enter 100 in the **GOES BELOW** field. Then select **Save**

(It's okay to leave any field blank if you don't want that specific Alert)

ACCOUNT	GOES BELOW	GOES ABOVE
Discretionary ****938-10	100	
Emergency_Funds ****938-15		
Travel ****938-00		
OVERDRAFT PROTECTION ****938-01		

Setting Up Alerts

9. After that, select the method for getting your alert, such as your email

Balance Alert OFF ON

ACCOUNT	GOES BELOW	GOES ABOVE
Discretionary ****938-10	\$100.00	

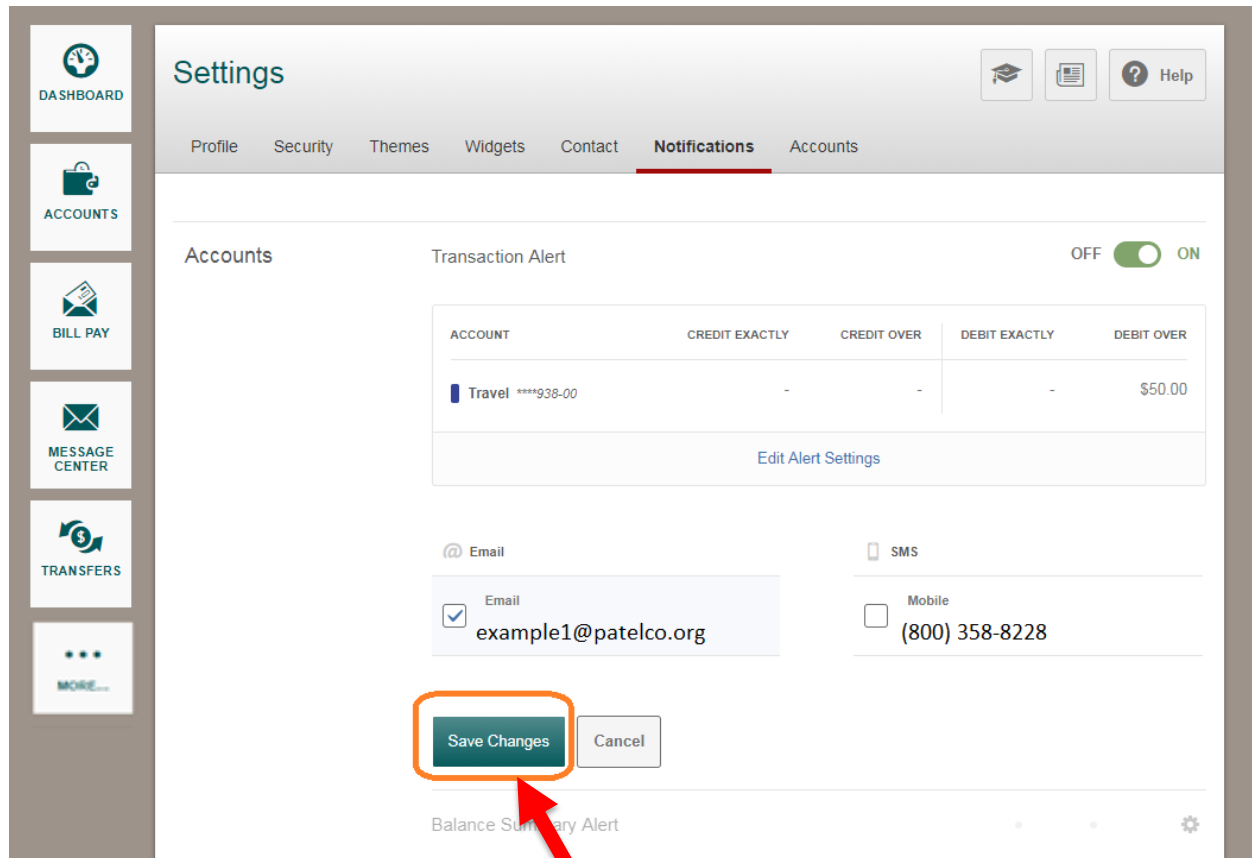
[Edit Alert Settings](#)

@ Email **📱 SMS**

Email
example1@patelco.org

Mobile

Then select **Save Changes**



Want to receive text message alerts? Check out [these instructions](#) to verify your mobile number. Once you've verified your number, you can opt for text message Alerts within **Patelco Online™**

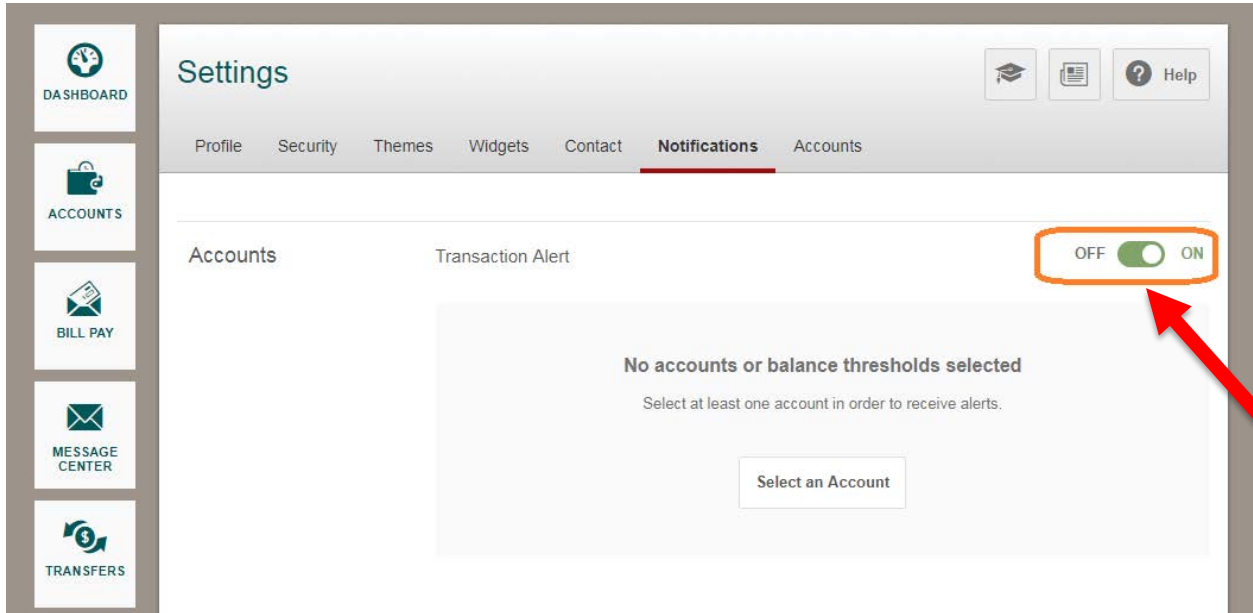
10. Let's say you want to get an alert for certain transactions. A **Transaction Alert** gives you a notification when a Credit or Debit clears that is over a certain amount, or is exactly a certain amount

Select the gear icon next to **Transaction Alert**

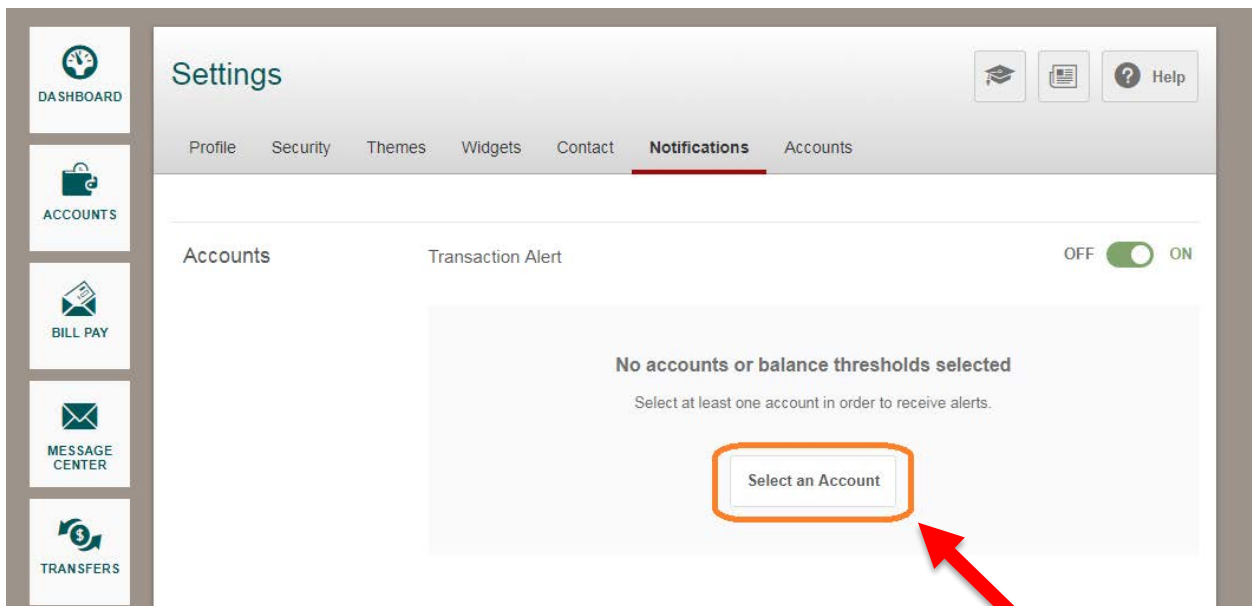
The screenshot shows the Patelco Online banking interface. At the top, there is a header with the Patelco Online logo, a welcome message "Welcome to Patelco Online™ Our all-new online banking platform", and the user name "John Doe". Below the header is a navigation menu with options: Profile, Security, Themes, Widgets, Contact, **Notifications**, and Accounts. The main content area is titled "Settings" and contains a list of alerts under the "Accounts" section. The "Transaction Alert" row is highlighted, and its gear icon is circled in orange with a red arrow pointing to it. Other alerts listed include Balance Summary Alert, Balance Alert, Automatic Withdrawal Alert, Automatic Deposit Alert, Check Cleared Alert, Insufficient Funds Alert, Loan Payment Due Alert, and Direct Deposit Alert. Below the "Accounts" section, there is a "Transfers" section with a "Transfer Fails" alert.

Category	Alert Name	Account	Frequency	Channel	Settings
Accounts	Transaction Alert				
	Balance Summary Alert				
	Balance Alert	1 account		@	
	Automatic Withdrawal Alert	1 account			
	Automatic Deposit Alert				
	Check Cleared Alert	1 account			
	Insufficient Funds Alert				
	Loan Payment Due Alert				
	Direct Deposit Alert				
	Transfers	Transfer Fails			

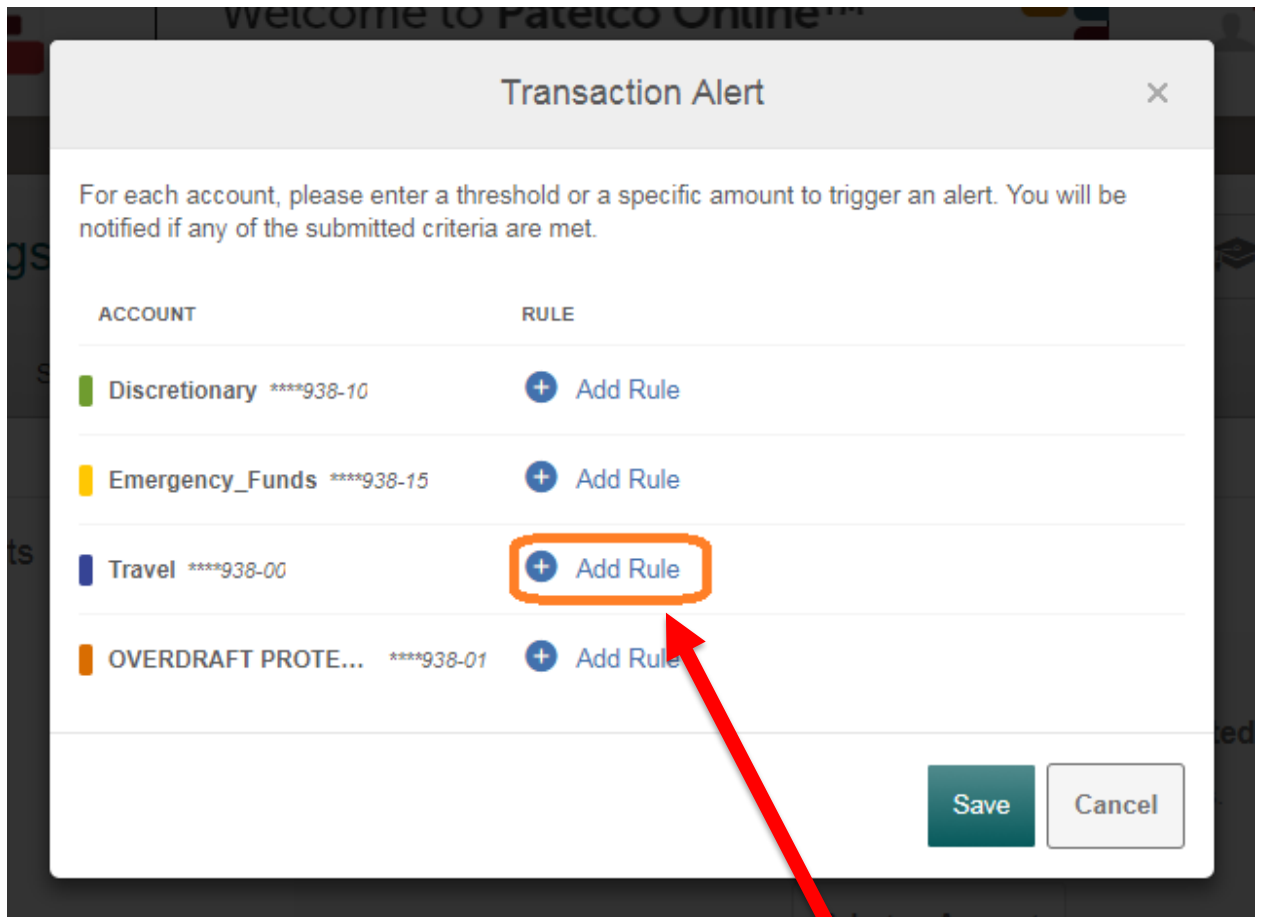
11. After selecting the gear icon, turn the alert **ON**



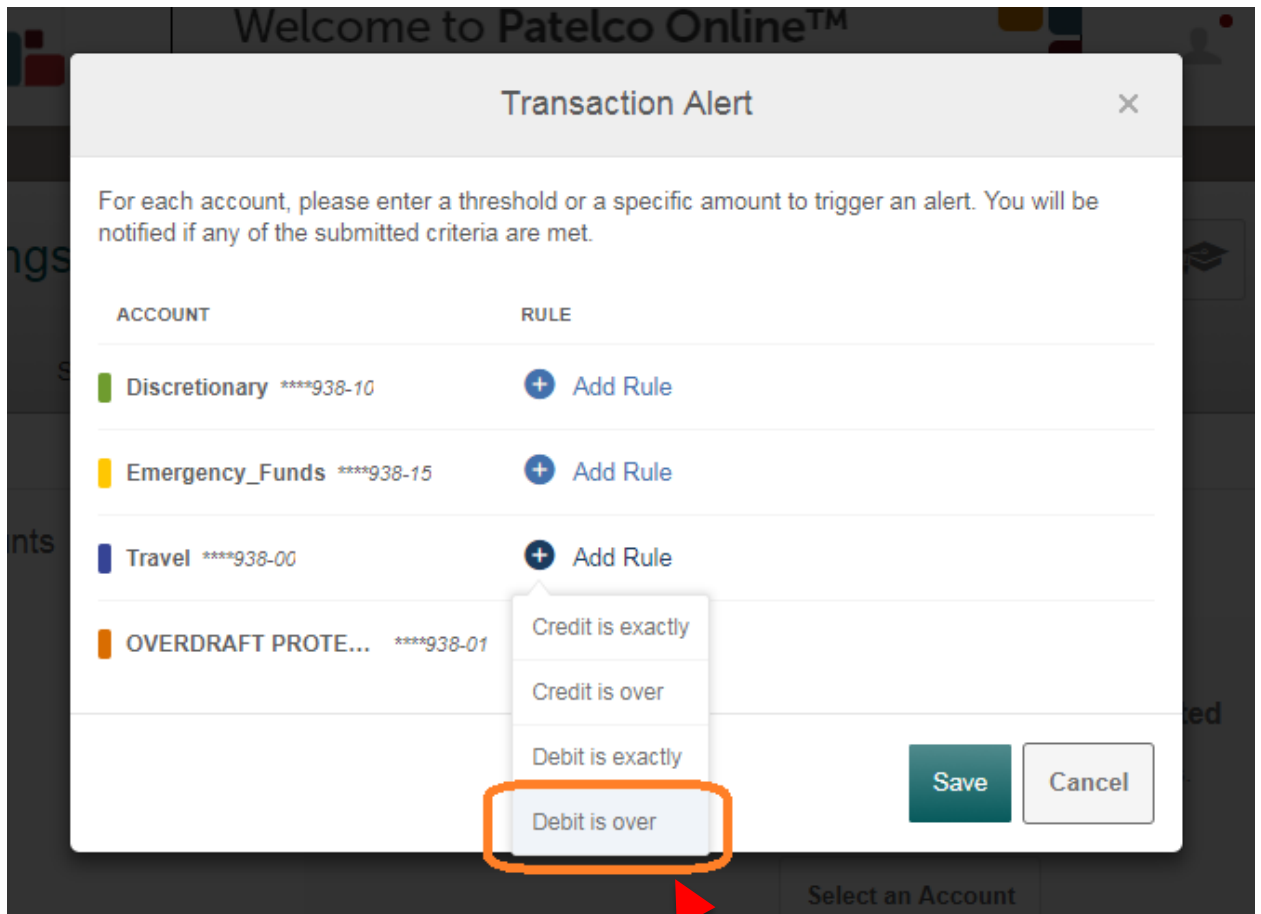
Then, **Select an Account**



- 12. Select **Add Rule** to add an alert type to a particular account. You can choose to get alerts about either Credits or Debits, and choose whether you want an alert about an exact amount or an alert only for transactions over a certain amount

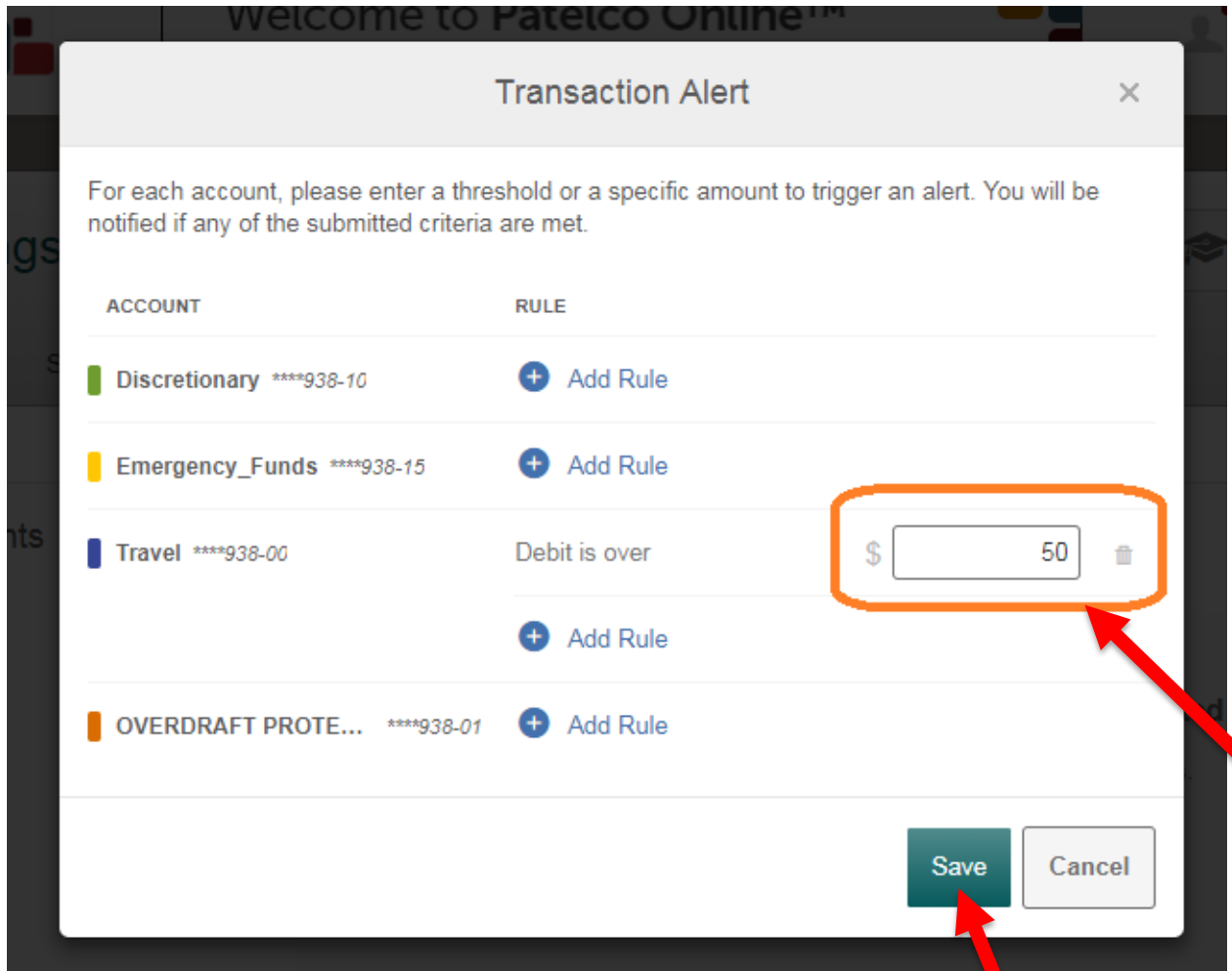


13. If you want an alert every time there's a debit over a certain amount, select **Debit is over**



Setting Up Alerts

14. If you want an Alert every time there is a debit over \$50, type 50 into the dollar field. Then select **Save**

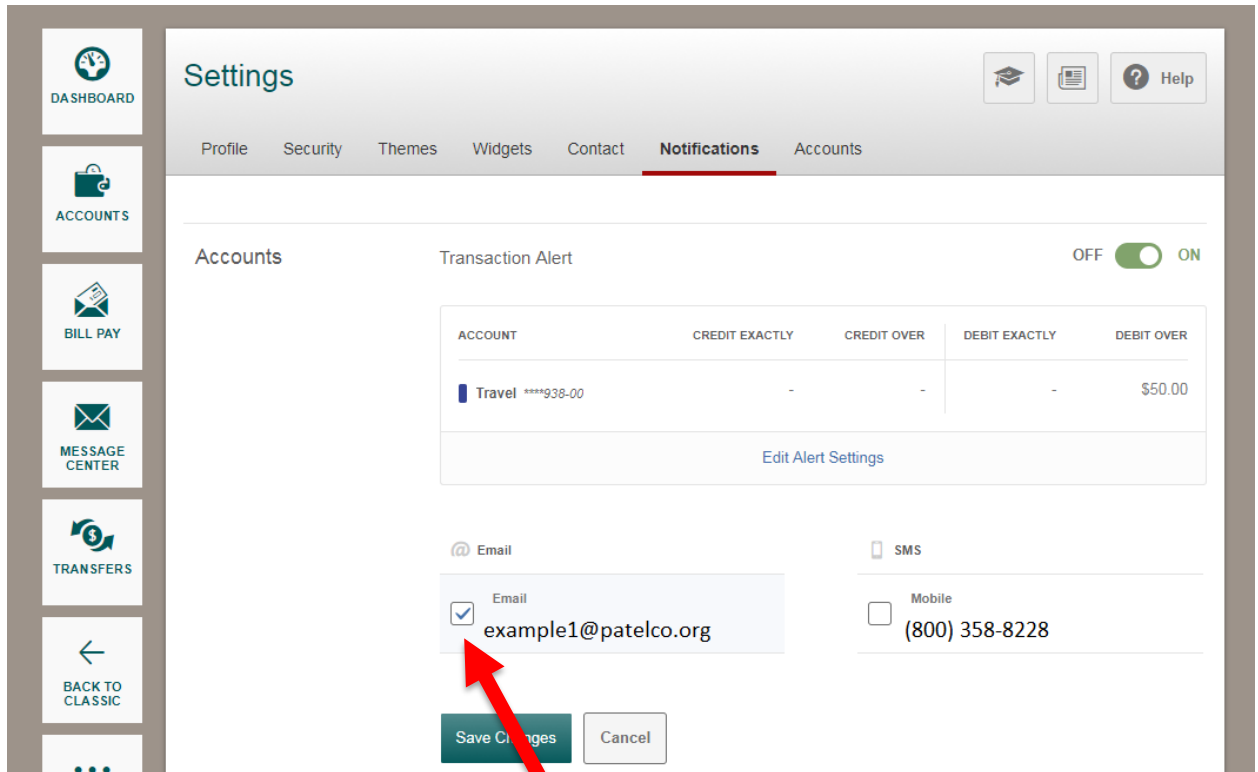


The screenshot shows a "Transaction Alert" dialog box with a close button (X) in the top right corner. Below the title, there is a descriptive text: "For each account, please enter a threshold or a specific amount to trigger an alert. You will be notified if any of the submitted criteria are met." The main area contains a table with two columns: "ACCOUNT" and "RULE".

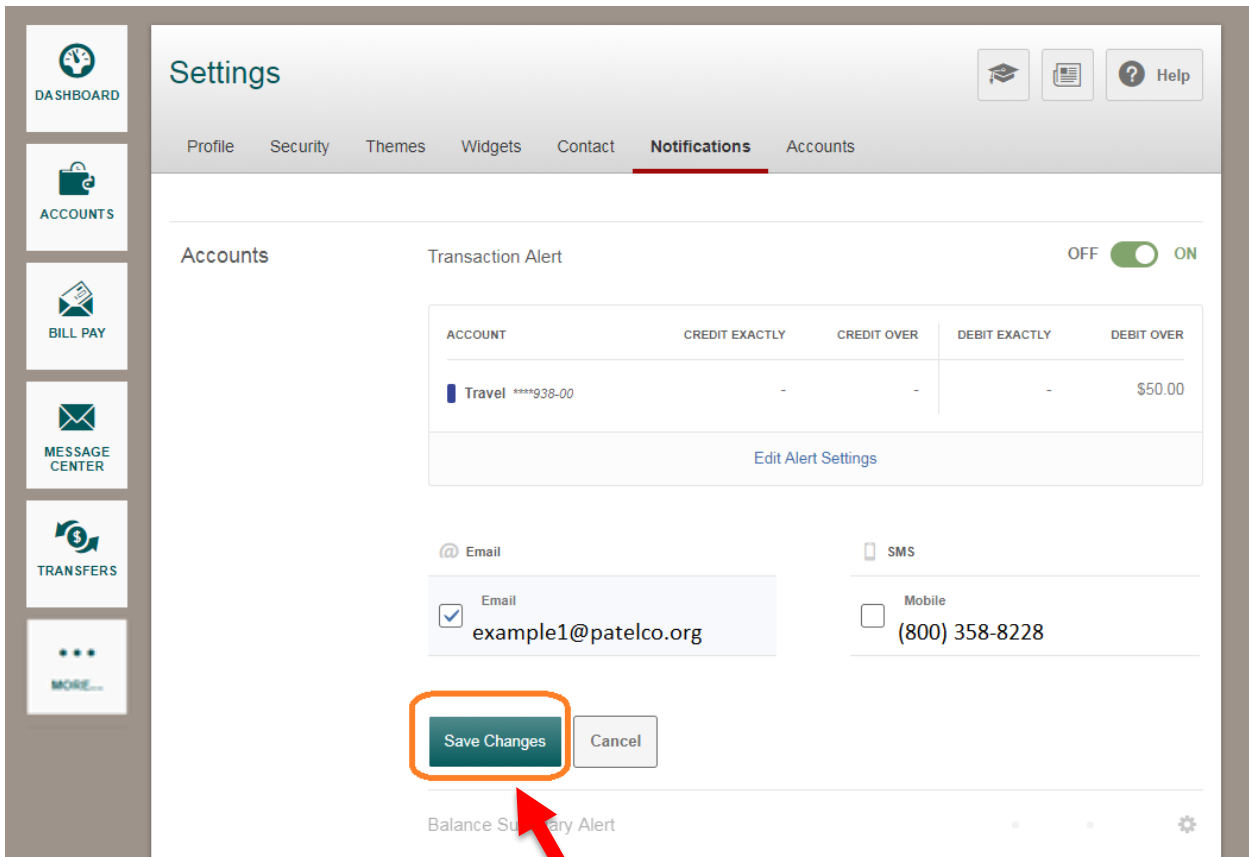
ACCOUNT	RULE
Discretionary ****938-10	+ Add Rule
Emergency_Funds ****938-15	+ Add Rule
Travel ****938-00	Debit is over <input type="text" value="50"/> <input type="button" value="\$"/> <input type="button" value="🗑️"/>
	+ Add Rule
OVERDRAFT PROTE... ****938-01	+ Add Rule

At the bottom right of the dialog, there are two buttons: "Save" (highlighted in teal) and "Cancel" (grey). A red arrow points from the "Save" button to the "50" in the input field, and another red arrow points from the "50" to the "\$" button.

15. Then select the method for getting your alert, such as your email address



16. Then select **Save Changes**



Want to receive text message alerts? Check out [these instructions](#) to verify your mobile number. Once you've verified your number, you can opt for text message Alerts within **Patelco Online™**

17. To change an alert (that you've already set up) or to turn it off, simply select the gear icon again

