E-Notifications™ for the NEW *Advantages Online™*

Welcome to the HELP section for *E-Notifications™*. If you have/had *E-Notifications™* in the earlier version of *Advantages Online™* you will notice several differences in the types of alerts you can elect in the new *Advantages Online™*. *E-Notifications™* can be found in the toolbar located under the SERVICES tab. To access, click on the Services tab and select Set Up *E-Notifications™.*

If you are **new** to *E-Notifications™* and simply want to set up alerts for the first time, please jump ahead to Page 2.

Comparisons:

Below is a list of UECU *E-Notifications™* from the earlier version of *Advantages Online™*. The new system provides a great deal of flexibility that allows you to create notices tailored to your specific needs. To assist you, we have created some "examples of alerts in the new system" that you can use, edit, or copy. We've also noted which *E-Notifications™* are still available in the NEW Advantages Online system.

Previous *Advantages Online™ E-Notifications™*	NEW *Advantages Online™*	Examples
Welcome Message	Yes – as Sign In	Yes
Profile Changes	No*	N/A
External Transfer Account Added	No	N/A
Credit Or Debit Card will be Expiring	No	N/A
Non-Sufficient Funds (NSF) for Checking Accounts	Yes	Yes
Overdraft Protection Funds Transferred	Yes	No
Insufficient Payroll Deduction for Loan Payment	No	N/A
CD Renewal Reminder	Yes	Yes
Credit Card Payment Reminder 5 days before Due Date	Yes	Yes
VISA® Credit Limit	No	N/A
Large Credit Card Transaction	Yes	Yes
Large Withdrawal	Yes	No
Electronic Transfer w/an External Financial Institution	No	No
Deposit	Yes	Yes
Checking Account Balance	Yes	No
ATM Transactions**	Yes	Yes

* While this is not part of the member selection for *E-Notifications™* the NEW *Advantages Online™* will automatically send you an email when contact information (username, password or security questions) are changed.

****ATM Transactions** is a new alert that is available in our NEW *Advantages Online™.*

Setting up *E-Notifications™* in the NEW *Advantages Online™*:

**Edit an existing alert or customize a sample Alert:**

Choose the SERVICES Tab and click on Set Up *E-Notifications™* along the top row of choices.

You will notice the following page that displays sample alert options that can be edited to meet your specific needs.
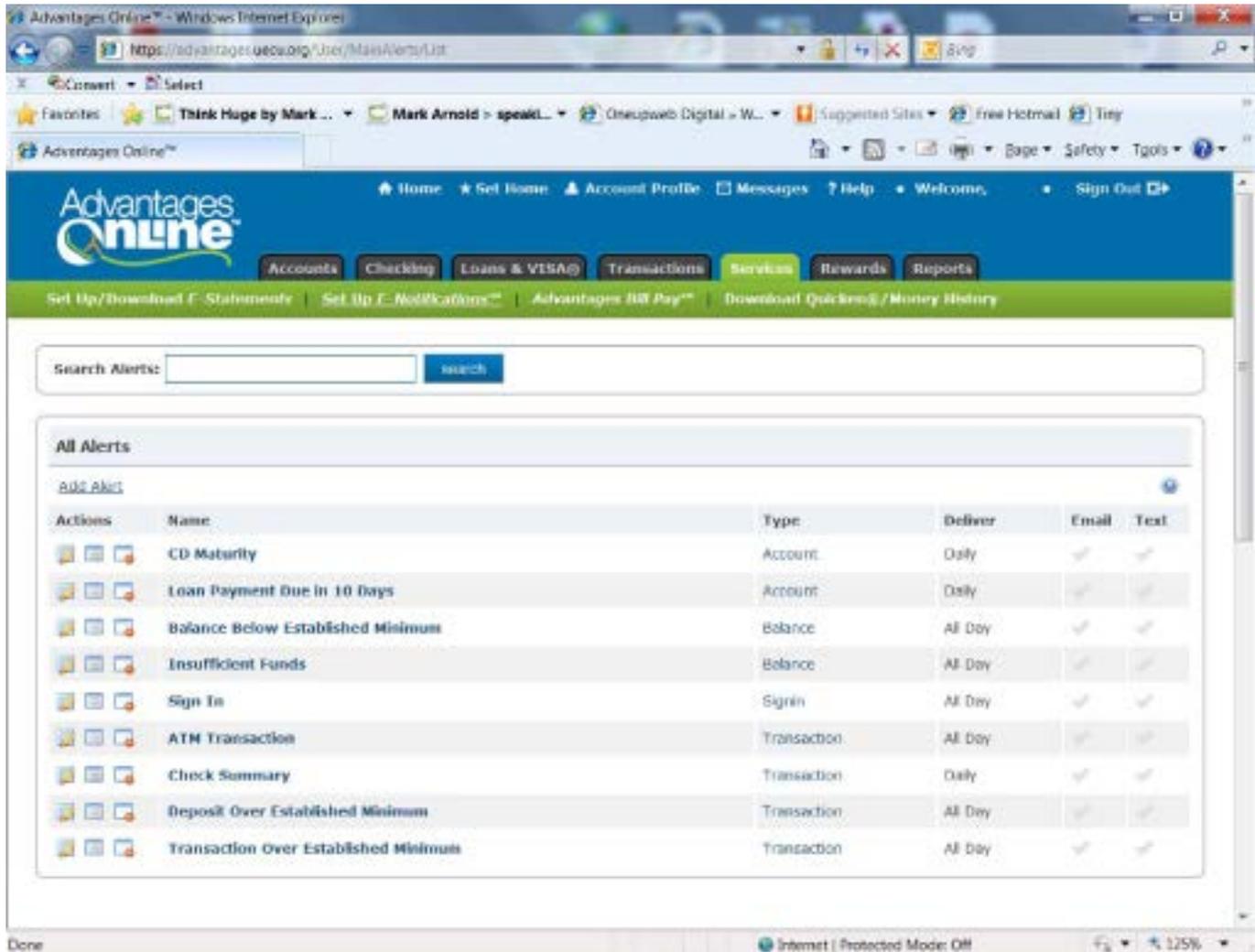
Please note that the check marks to your right are gray. If you wish to edit any of the sample alerts, you can either click on a gray check mark or choose the edit button found to the far left of the Actions column (hovering your cursor over any of the Actions buttons will show you the various Actions you can take: Edit this Alert, Show Recent Alerts or Delete this Alert).

For example, choose the Edit this Alert Action on the far left for the CD Maturity Sample Alert. You will see the following screen:
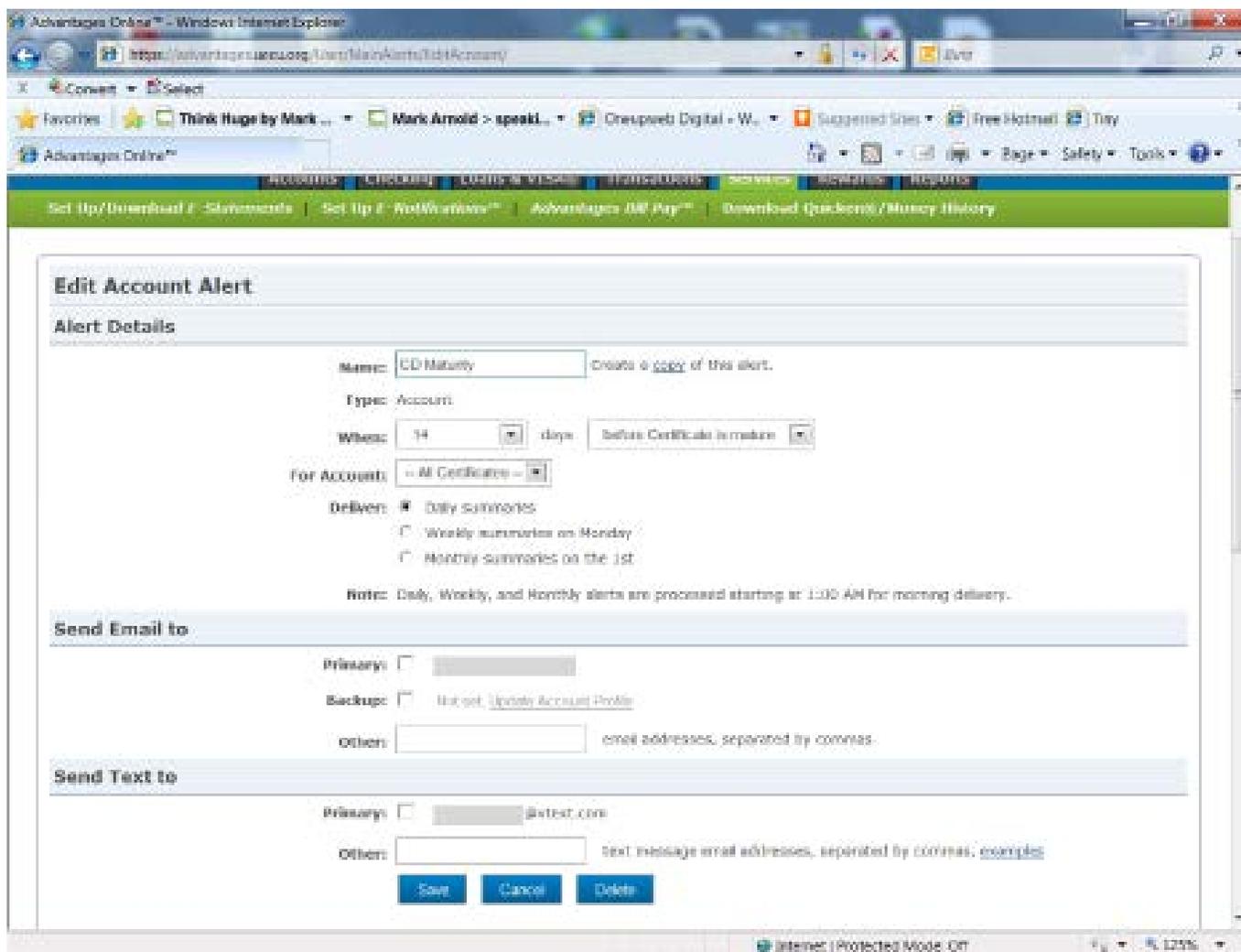
Notice that there are variables already set up in the Sample that you have the ability to change.

For example, you can name your CD and/or select the number of days before maturity to receive your notification. All of these options are available by making changes to the first 4 variable data fields on this screen.

Alerts can be received Daily, Weekly or Monthly. Each alert type provides its own unique set of variable data fields for you to work with to create an alert very specific to your own needs.

With each alert you can decide where you would like the alert sent. If your account profile includes an email address it will automatically be listed as the Primary email for alert purposes . Your account profile can be updated with a backup email by clicking on the link provided). You have the option to choice primary email, back up e-mail, or both.

To set up a TEXT alert for the first time, click on the link: Update Account Profile in the **Send Text to** section of Adding an Alert. Follow the screens below:
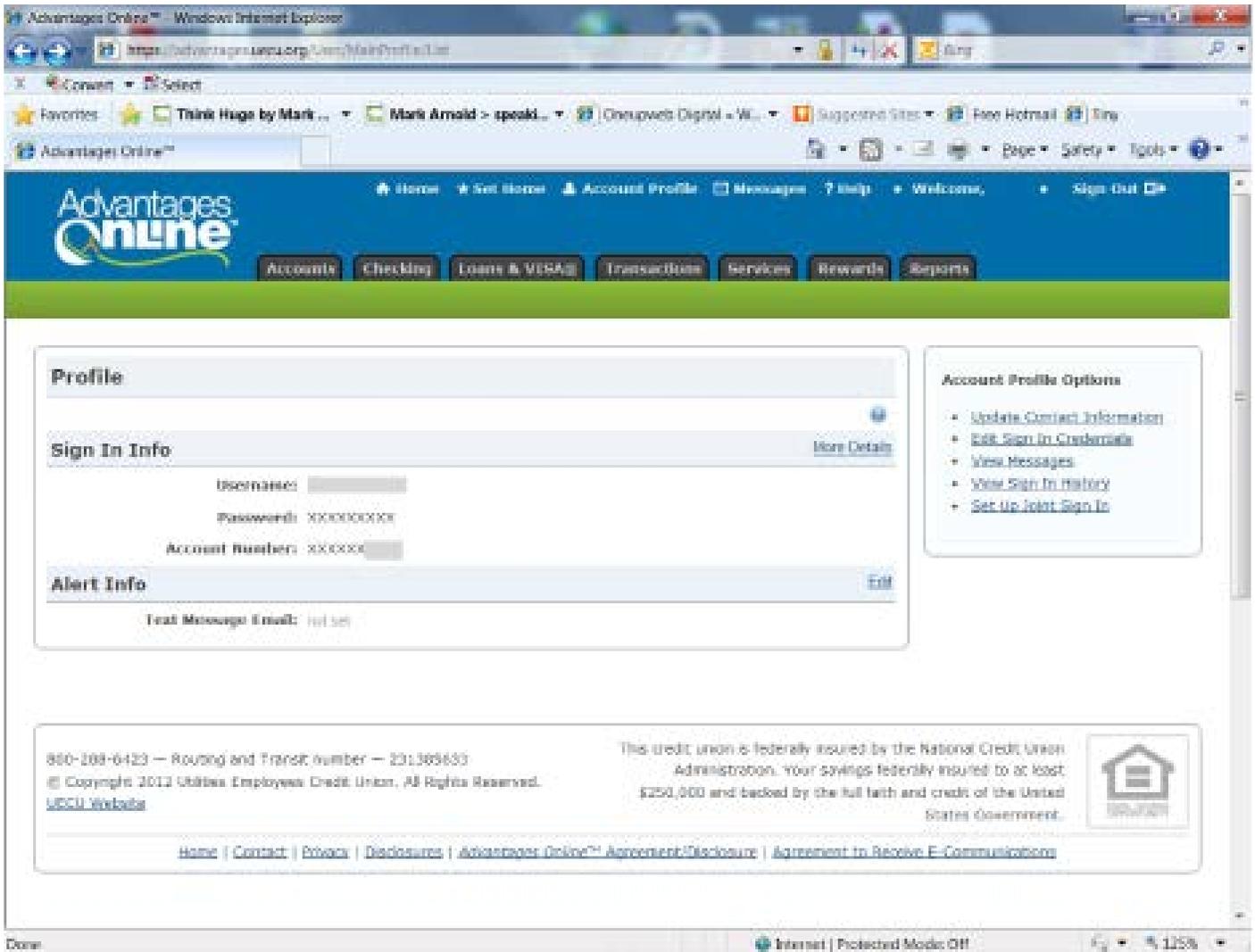
Click the Edit link on the right hand side of the **Alert Info** section.
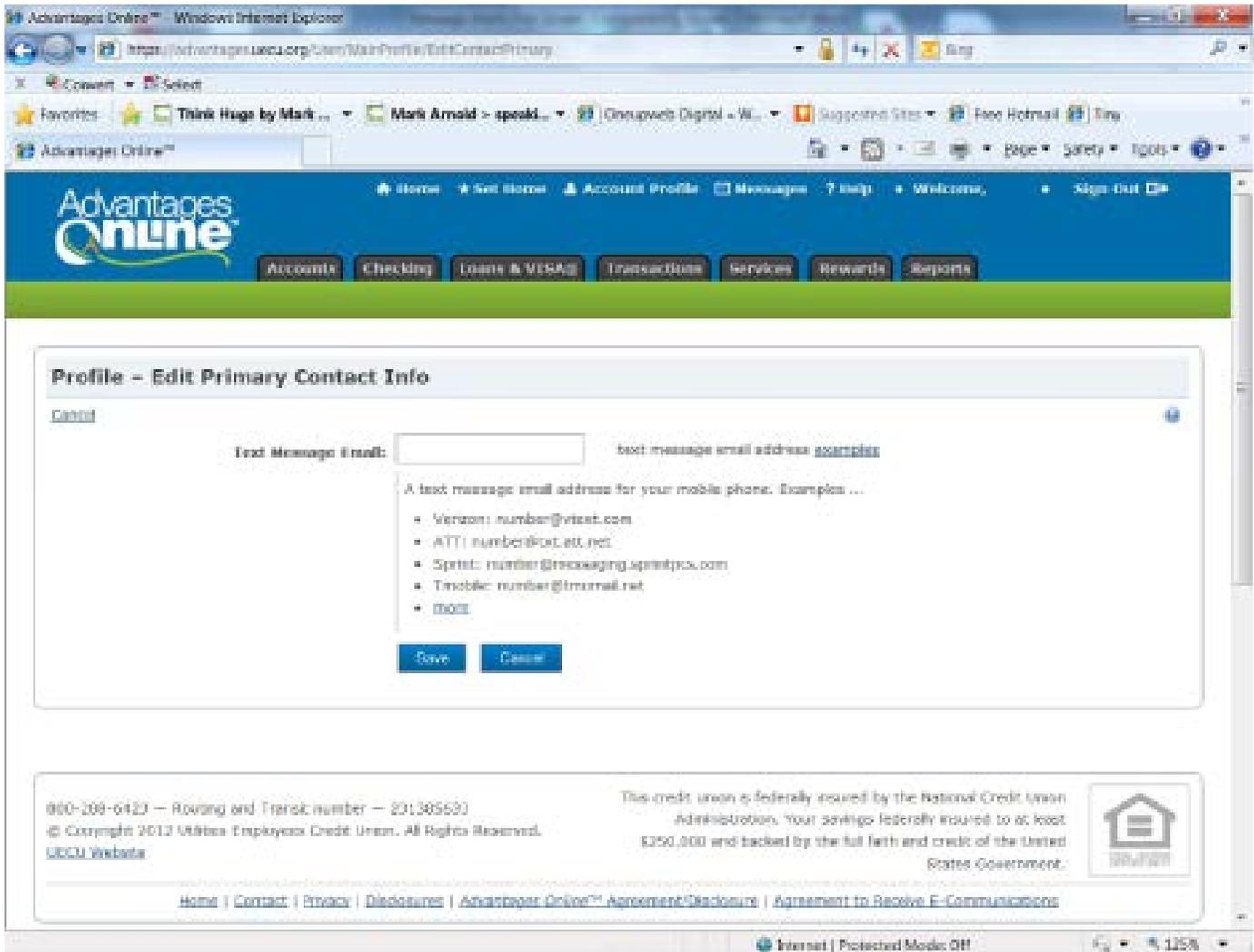
To receive a text message alert, add the phone number and cell phone carrier as an email in the field provided. If you click on "text message email address **examples**" you will see several examples listed for a few of the major carriers. By clicking more you will be directed to an online site for additional cell phone carriers. Add your number, @ symbol, and the cell phone carrier URL as shown in the examples.

Click SAVE.
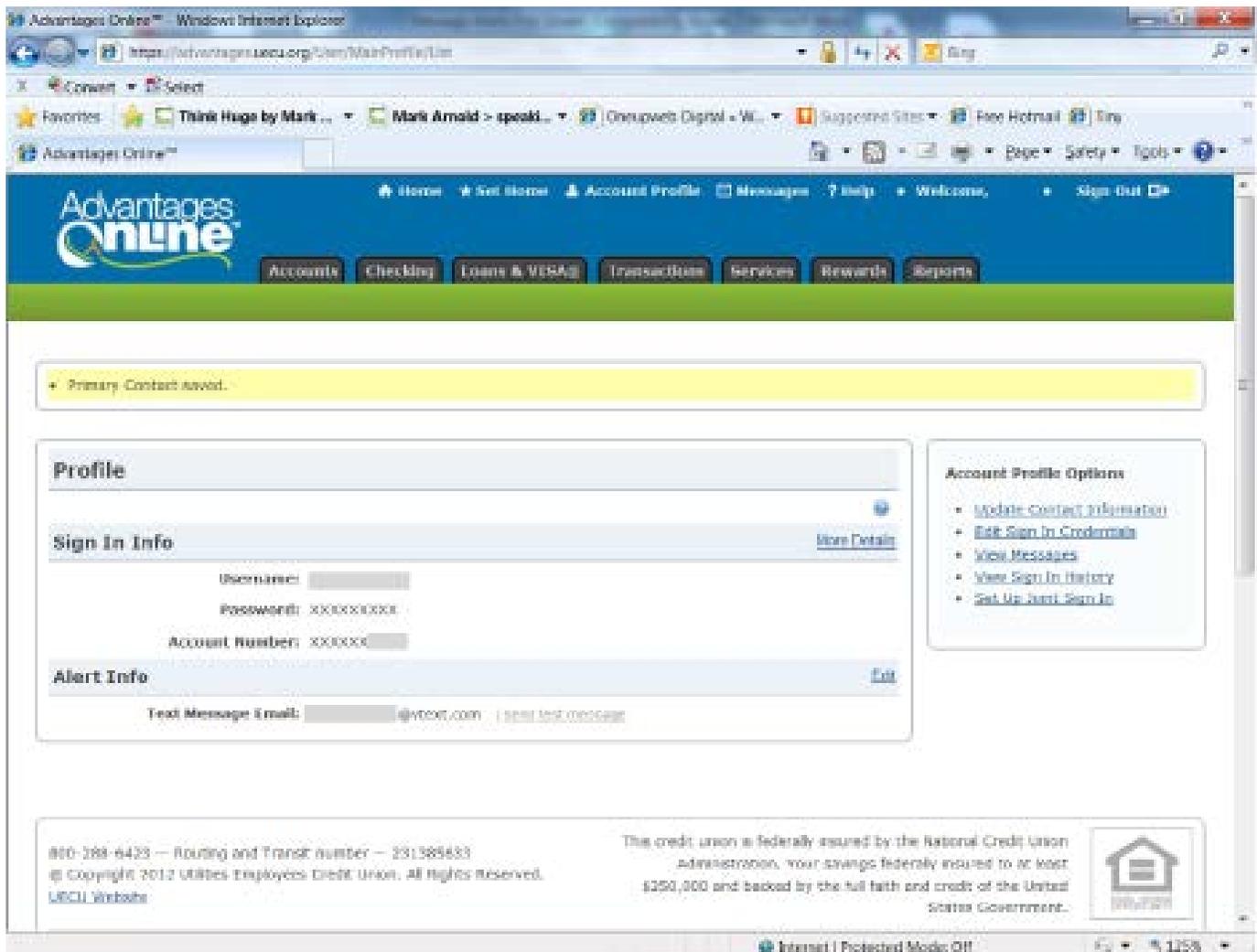
Your number as a text message email will appear. You can test the Text Message Email by clicking the link to the right "send test message."

When you are satisfied that the text message email works, you can return to the *E-Notifications™* screen by choosing the Services tab and then Set Up *E-Notifications™* from the row of choices.

The last step to set up a text message is to click on the box in front of the text message email. See below:
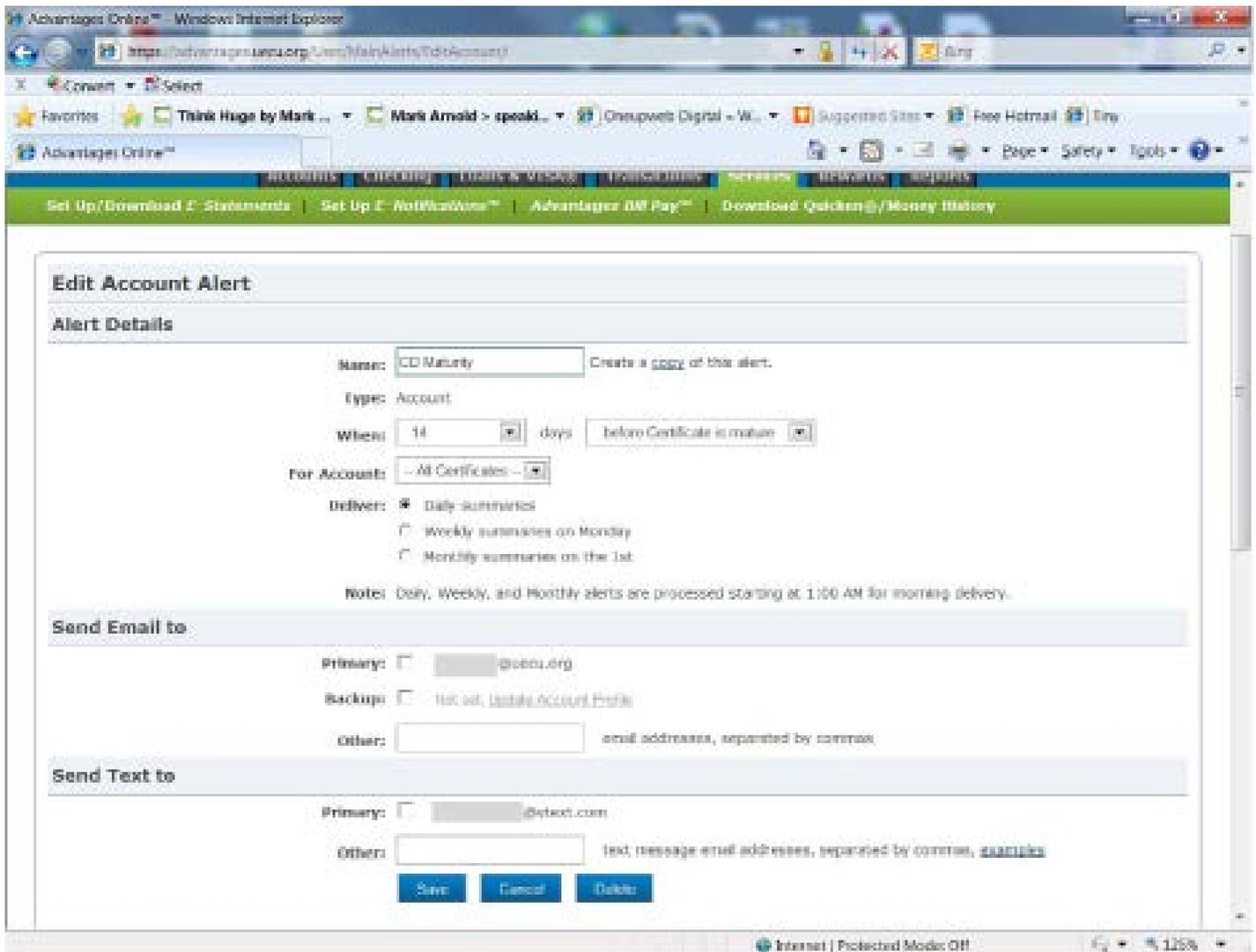
When you return to the initial set up page you will see that your CD Maturity Alert is showing green check marks for both Email and Text. The CD Maturity Alert is now set up. See below:

At any point, you can manage your alerts by clicking on the actions on the left side of the screen. You can select to Edit this alert, Show Recent alerts or Delete this Alert).

Creating a NEW Alert:

If you would like to create an alert that is not listed as a "sample," you can click on the Add Alert link located in the section titled **All Alerts**. By clicking on the link you will see the following screen:
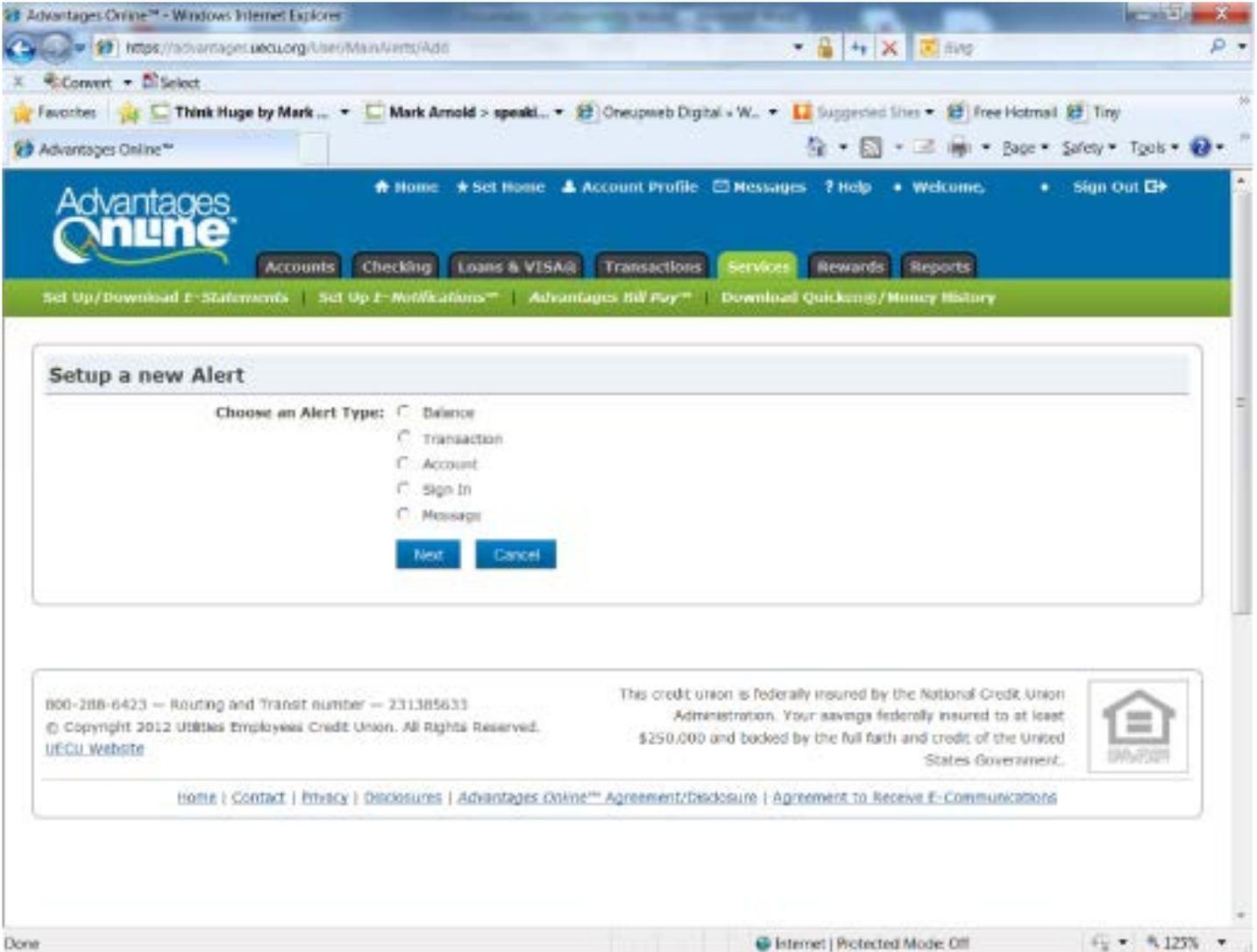
You have the choice of creating alerts for Balance information, Transactions, Account information, Sign In, and Messages. Let's look at each one individually:

Balance Alerts:
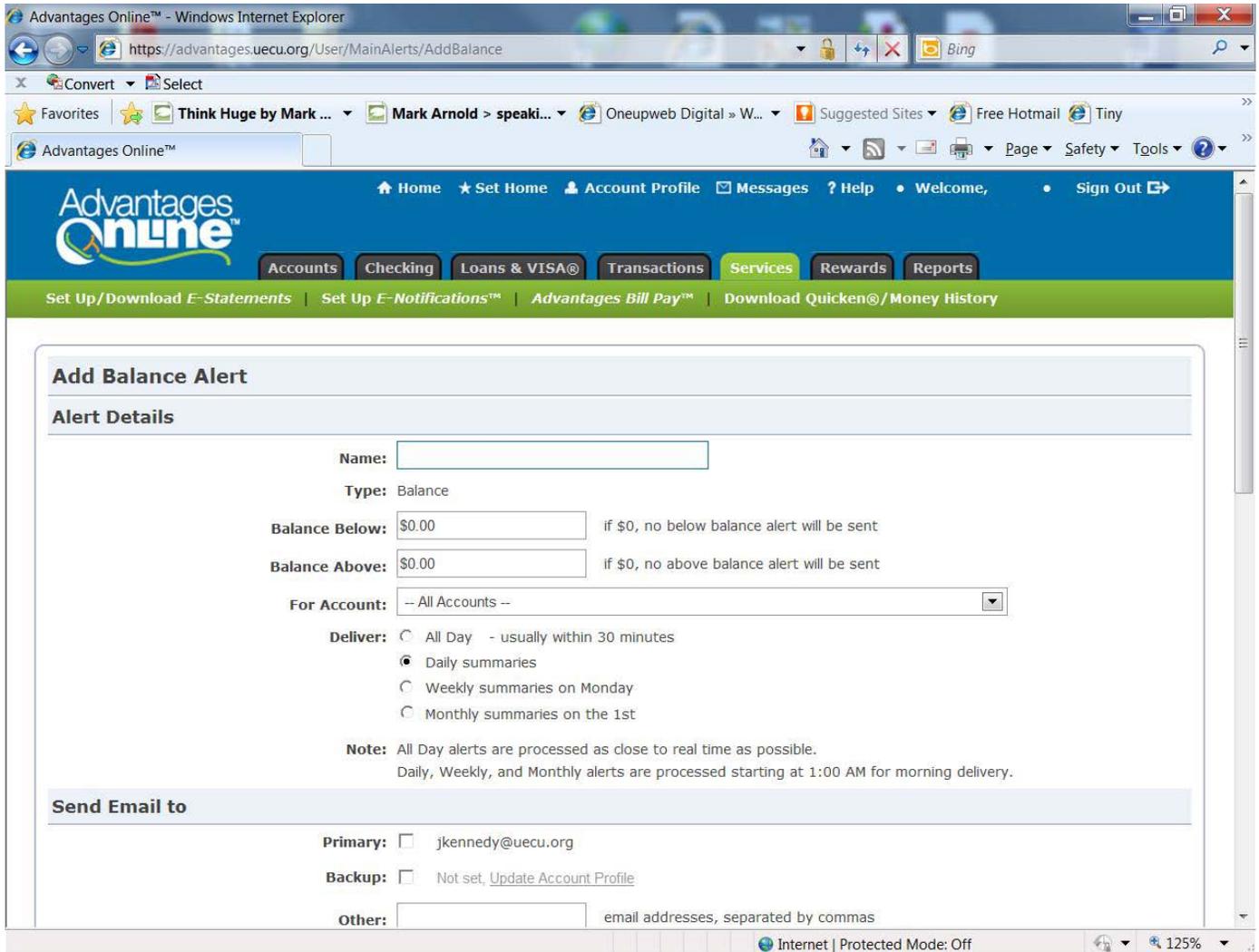

A Balance Alert allows you to set a dollar value below or above a certain amount.

You may select a name for your alert; then enter a dollar value either below or above a certain amount.

In addition, you can determine which account (Savings, Checking, All, etc…) should trigger the alert.

You may also determine when you would like the alert delivered: All day (which means at any time during the day that the condition selected occurs), Daily, Weekly or Monthly.

You can also choose where you would like the alert sent: primary email, backup email, and phone as a text message (not shown above but it is an option for all alerts).

Transaction Alerts:
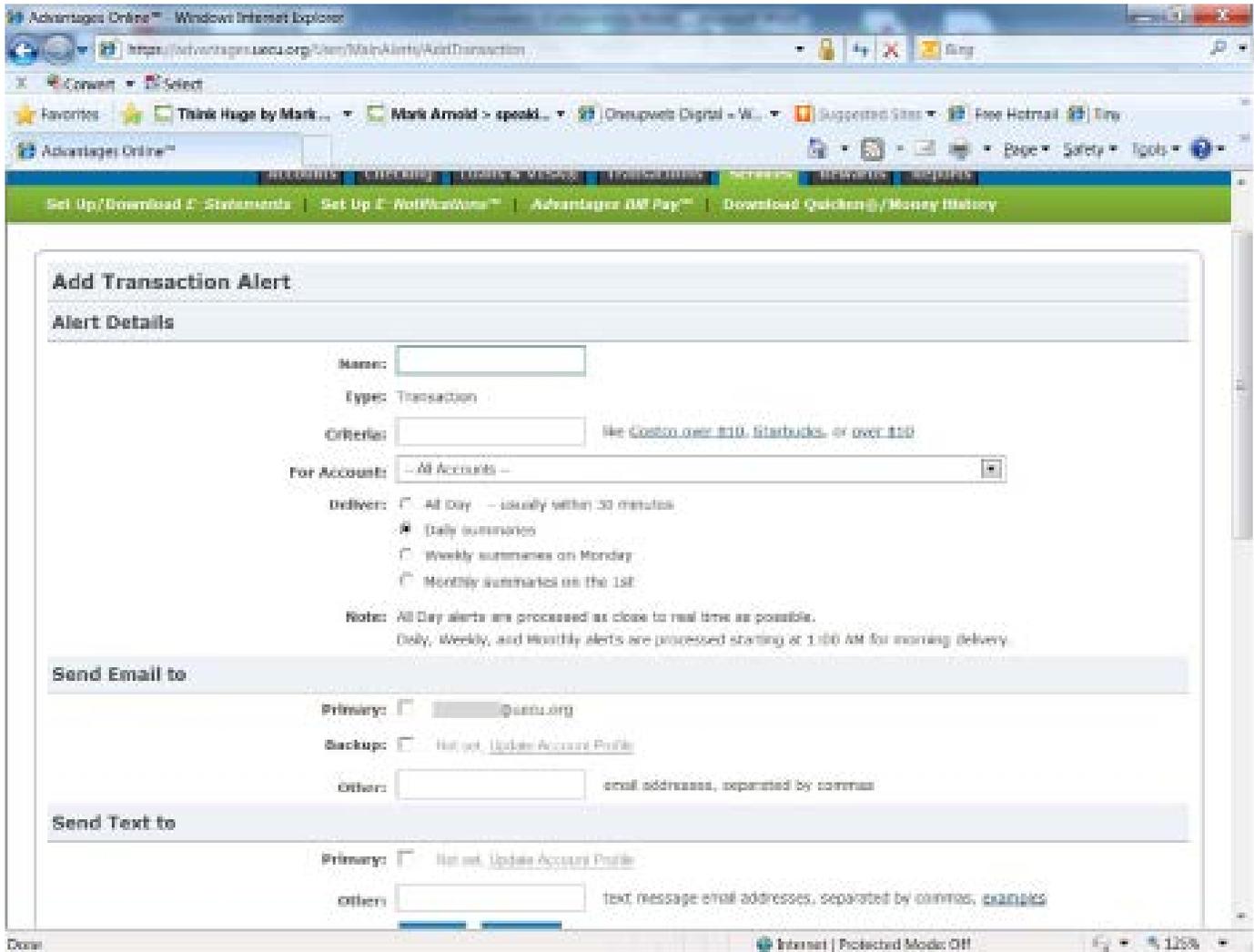
A Transaction Alert notifies you when new transactions arrive in your Transaction History.

You have the option to name the alert anything that you want to make it easily identifiable when you receive the alert notification.

You can create criteria for numerous situations based on any valid Transaction search. A few examples are provided but you can utilize categories and keywords (ex. Keyword: OD Prot Fee) to create very unique alerts specifically for your needs.
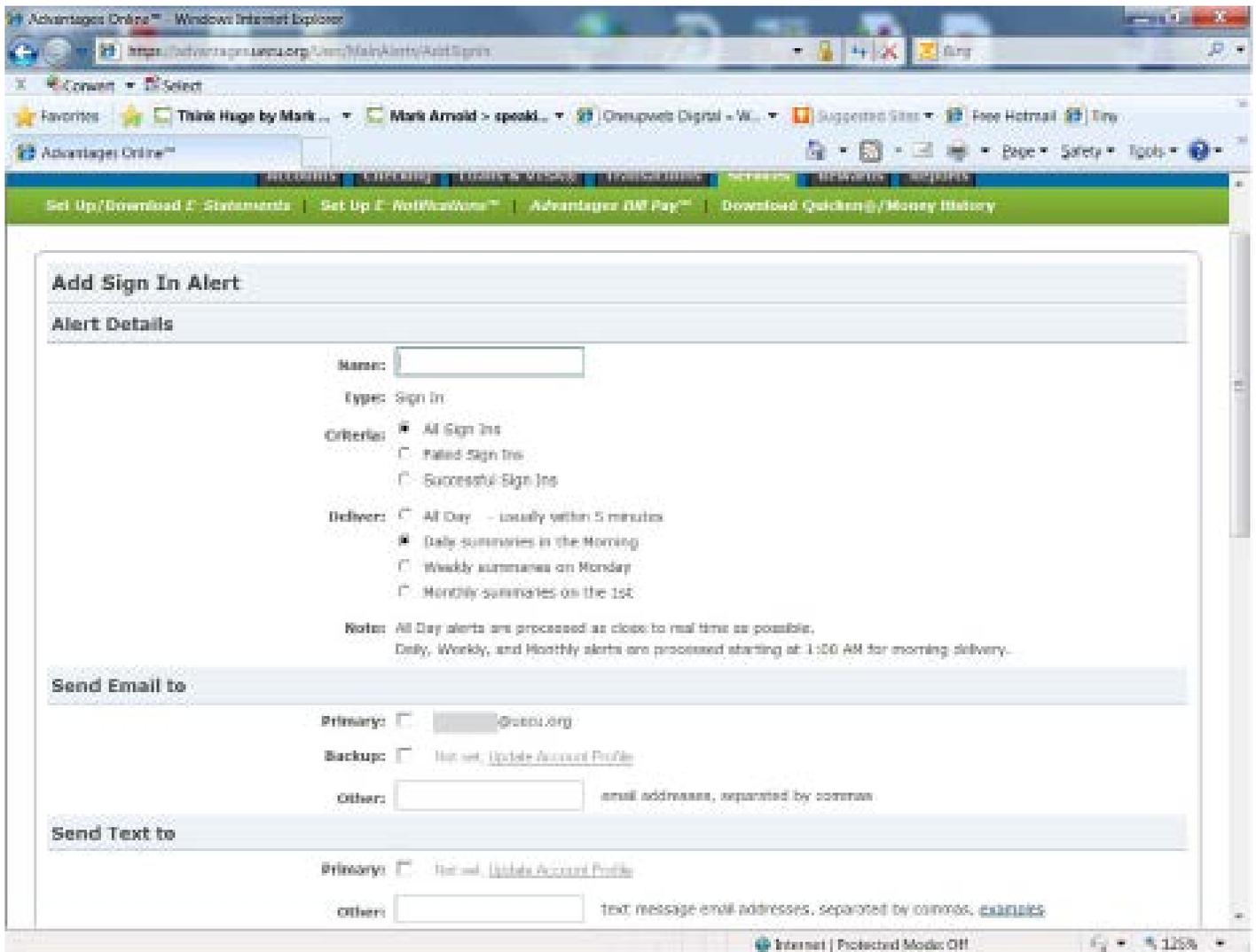
You may also choose when the alert is delivered and where to have the email or text sent.

Account Alerts:
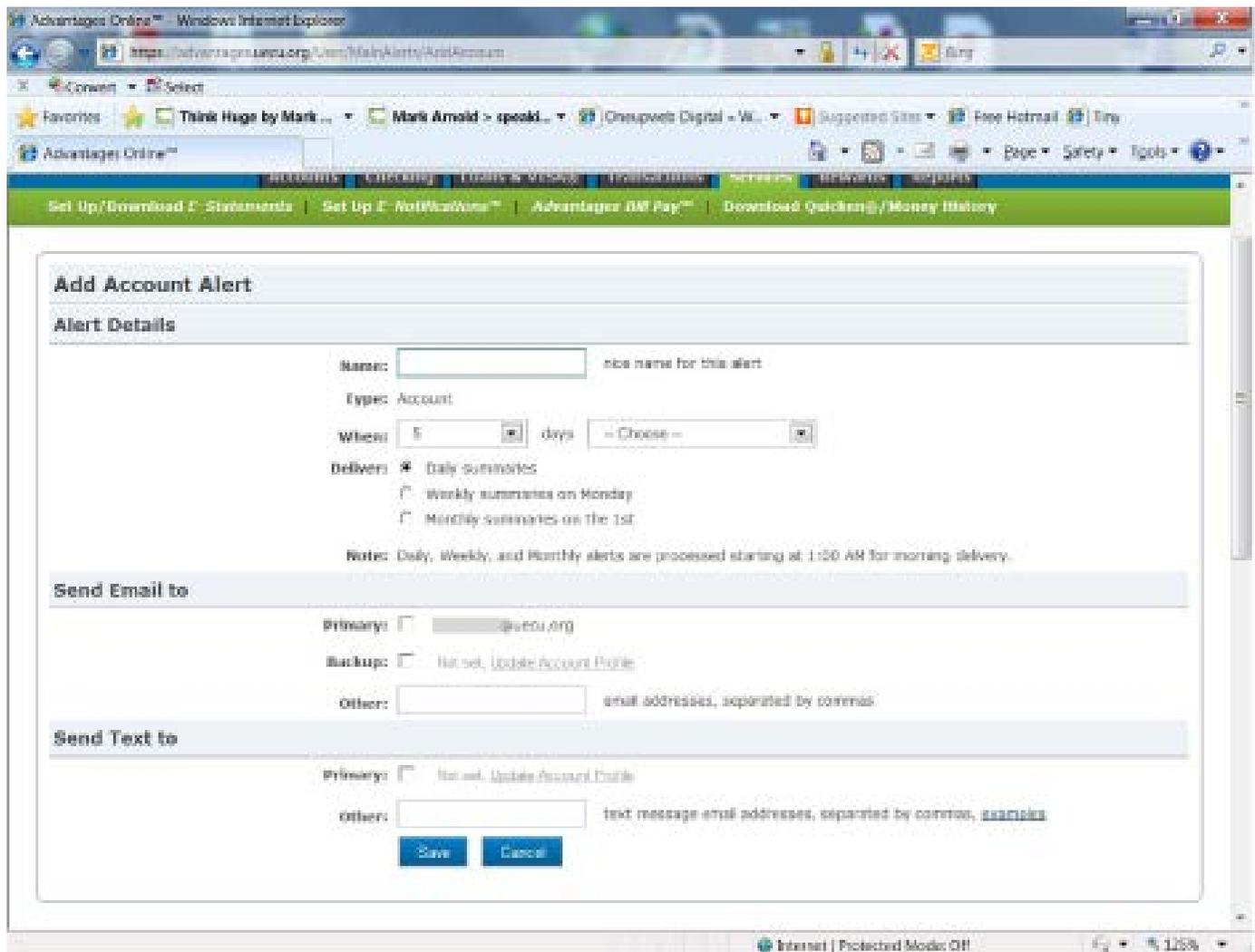
Account alerts are specific to CD Renewals and Loan Payments. You can choose the name as well as the number of days you wish to be notified, either before or after a loan payment, or before a CD renewal.

Sign In Alerts:

This alert is very similar to the alert received with the earlier version of *Advantages Online™*. You can receive an alert for ALL, Failed, or Successful Sign Ins – it's your choice.

Messages:

Never miss an important message from *Advantages Online™*. You can receive an alert at any time of the day, daily, weekly, or monthly, when a Message has been posted to your account. Choose specific keywords as the criteria for messages that you wouldn't want to miss.

Take some time to create and test alerts. We think you'll be very happy with the variety of criteria you can design to make the alerts very specific to your needs.