

History Alerts

If you're ever concerned about amount limits or pending checks, you can create History Alerts to contact you when a check number posts or transactions meet an amount you choose.

The screenshot shows the 'New History Alert' form with the following elements and callouts:

- 1:** A drop-down menu for 'New Alerts' with options: Date Alert, Account Alert, History Alert, and Online Transaction Alert.
- 2:** A checkbox next to 'State Draft: XXXXXXXX7' under 'Select an account'.
- 3:** A checkbox next to 'Debit Transaction' under 'Select a transaction'.
- 4:** A checkbox next to 'greater than' under 'Select a comparison'.
- 5:** The 'Enter an amount' section, which includes a text input with '\$' and '0.00', and a numeric keypad with 'Delete' and 'Save' buttons.
- 6:** A drop-down menu for 'select a delivery method' with options: Secure Message Only, Email, Phone, and Text Message.
- 7:** A checkbox next to 'Every Occurrence' under 'FREQUENCY:'.
- 8:** A red 'Save' button at the bottom of the form.

Other visible text includes 'New History Alert', 'Back to Alerts', 'ACCOUNT: XXXXXXXX9517', 'TRANSACTION: Check Number', 'CHECK NUMBER: No Check Number Entered', and 'DELIVERY METHOD: Send only a secure message'.

In the **Settings** tab, click **Alerts**.

1. Click the “New Alert” drop-down and select “History Alert.”
2. Check the box next to an account name.
3. Select a transaction type by checking a box.
4. Check a box to select a comparison. These options vary depending on the chosen transaction type.
5. Enter an amount or check number and click **Save**.
6. Select a delivery method using the drop-down.
7. Choose a frequency by checking the box next to “Every Occurrence” to repeat the alert. Click **Save** when you are finished.