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Overview

Alerts warn you about the status of your accounts and notify you when transactions occur. You do **not** need to be logged into DFCU OnLine for DFCU Financial to send the alert.

When you create an alert, you specify the conditions that trigger the alert as well as the way that you receive the alert. These conditions vary depending on the alert type. There are three alert types, (1) **Account**, (2) **History**, and (3) **Security**.

You can choose to receive Alerts in any of these ways:

- **Secure Message** – you must be logged in to read the alert.
- **Email** – to receive the alert as an email you will need to enter the email address where you want to send the alert.
- **Telephone call** – to receive the alert as a telephone call you will need to select the country from the Select Phone Country drop-down list, enter the phone number to call, and specify the time to call.
- **Text (SMS) message** – to receive the alert as a text (SMS) message. Select the SMS country, and enter the number and the time to send the message, and select the Agree to Terms check box.

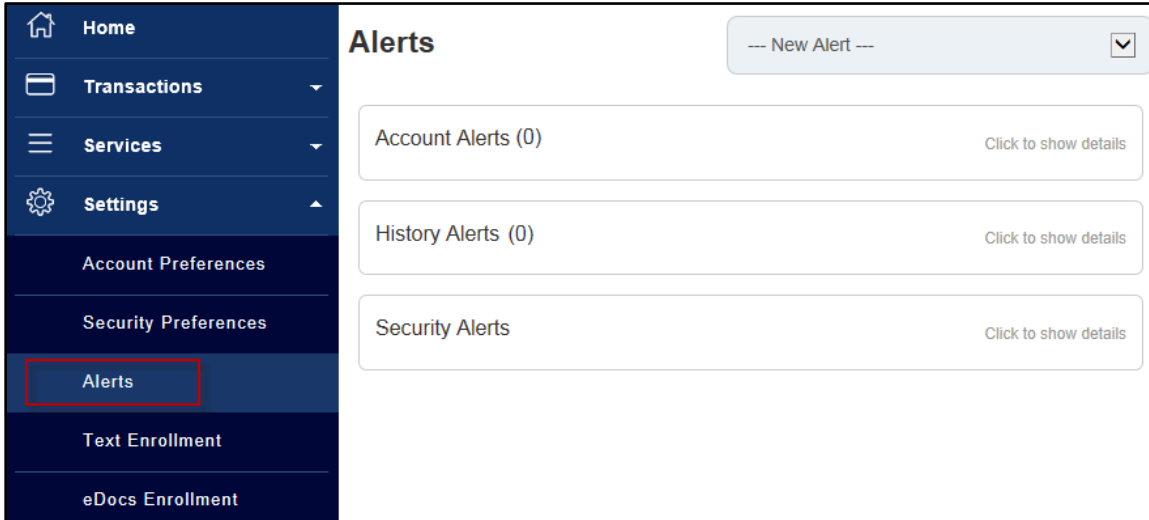
Managing Account & History Alerts in DFCU OnLine— Filters, continued

I. Creating an Alert

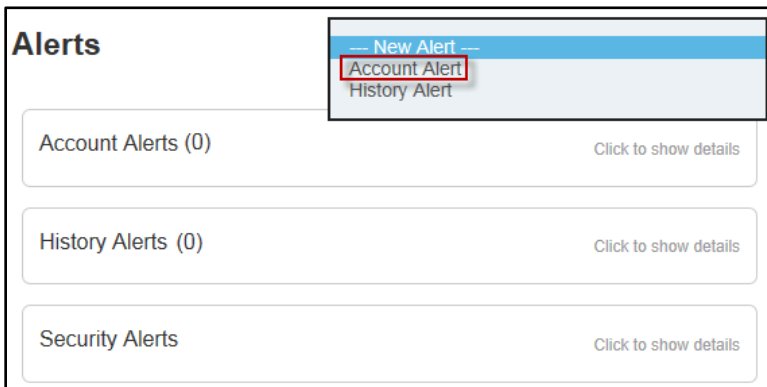
When you create an alert, it takes effect immediately and stays in effect until you disable or delete it.

To create an **Account Alert**:

1. Under Settings in the menu, click on Alerts. The Alerts page appears.



2. In the Create New Alert drop-down list, click the Account Alert, the New Alert page appears.



Managing Account & History Alerts in DFCU OnLine— Filters, continued

3. Select the conditions that trigger the alert.

New Account Alert [Back to Alerts](#)

A ACCOUNT: No Account Selected	Select an account <div style="border: 1px solid #ccc; padding: 5px;"><p>CHECKING: 1234567</p><p>INSURED MONEY MARKET: 1234567</p><p>SAVINGS: 1234567</p><p>VISA PLATINUM: 1234567</p></div>
B BALANCE TYPE: No Balance Type Selected	
C THRESHOLD: No Threshold Selected	
D AMOUNT: No Amount Entered	
E DELIVERY METHOD: Send only a secure message	
F FREQUENCY: <input checked="" type="checkbox"/> Every Occurrence	
<div style="border: 1px solid #ccc; background-color: #d9d9d9; padding: 10px; width: fit-content; margin: 0 auto;">Save</div>	

A. From the account list, select an account.

Select an account

CHECKING: 1234567

INSURED MONEY MARKET: 1234567

SAVINGS: 1234567

VISA PLATINUM: 1234567

B. Select a Balance Type.

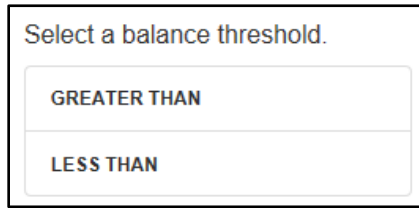
Select a balance type

CURRENT BALANCE

AVAILABLE BALANCE

Managing Account & History Alerts in DFCU OnLine— Filters, continued

C. Select the balance threshold.

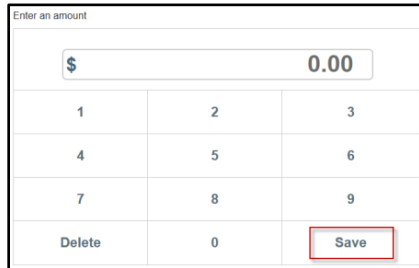


Select a balance threshold.

GREATER THAN

LESS THAN

D. Enter the amount, and then click Save.

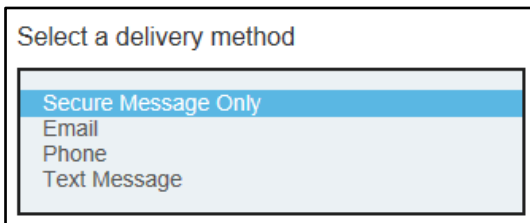


Enter an amount

\$ 0.00

1	2	3
4	5	6
7	8	9
Delete	0	Save

E. Select the method of how you want the alert delivered.



Select a delivery method

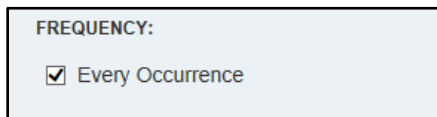
Secure Message Only

Email

Phone

Text Message

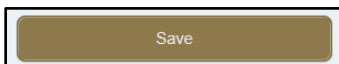
F. Select the frequency. **Note:** Check the Every Occurrence check box to repeat the alert every time that the trigger occurs.



FREQUENCY:

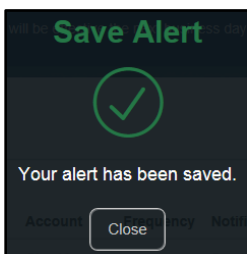
Every Occurrence

4. Once all the alert information is entered, click the Save button.



Save

5. Click Close to close the Save Alert confirmation.



Save Alert

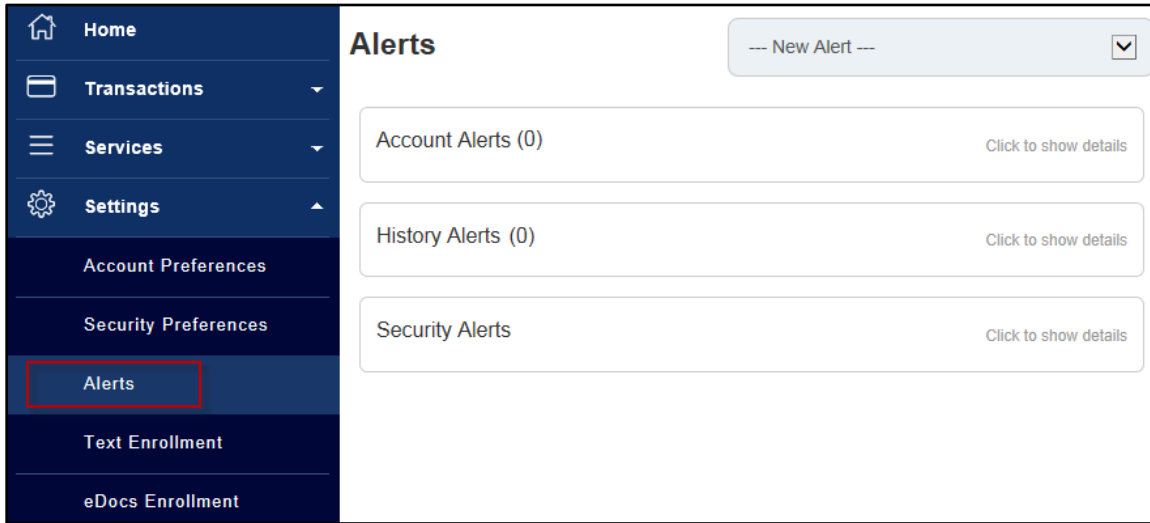
Your alert has been saved.

Close

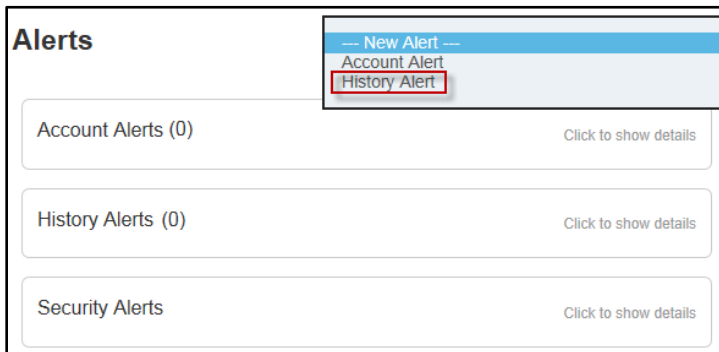
Managing Account & History Alerts in DFCU OnLine— Filters, continued

To create a **History Alert**:

1. Under Settings in the menu, click on Alerts. The Alerts page appears.



2. In the Create New Alert drop-down list, click the History Alert, the New Alert page appears.



Managing Account & History Alerts in DFCU OnLine— Filters, continued

3. Select the conditions that trigger the alert.

New History Alert [Back to Alerts](#)

A ACCOUNT: <i>No Account Selected</i>	Select an account
B TRANSACTION: No Transaction Selected	CHECKING: 1234567
C THRESHOLD: No Threshold Selected	INSURED MONEY MARKET: 1234567
D AMOUNT: No Amount Entered	SAVINGS: 1234567
E DELIVERY METHOD: Send only a secure message	VISA PLATINUM: 1234567
F FREQUENCY: <input checked="" type="checkbox"/> Every Occurrence	
<input type="button" value="Save"/>	

A. From the account list, select an account.

Select an account

CHECKING: 1234567
INSURED MONEY MARKET: 1234567
SAVINGS: 1234567
VISA PLATINUM: 1234567

B. Select a transaction type.

Select a transaction

DEBIT TRANSACTION
CREDIT TRANSACTION

Managing Account & History Alerts in DFCU OnLine— Filters, continued

C. Select a balance threshold.

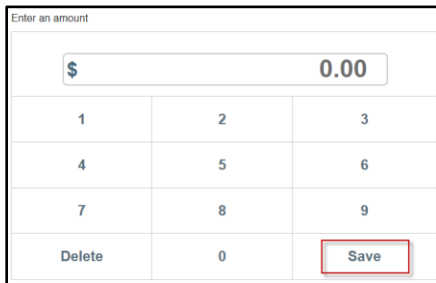


Select a balance threshold.

GREATER THAN

LESS THAN

D. Enter the amount, and then click Save.

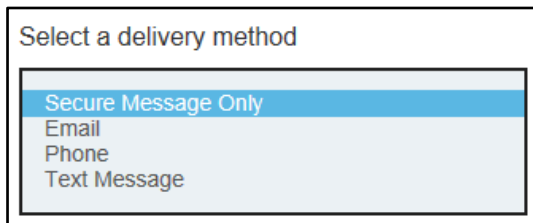


Enter an amount

\$ 0.00

1	2	3
4	5	6
7	8	9
Delete	0	Save

E. Select the method of how you want the alert delivered.



Select a delivery method

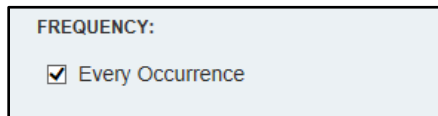
Secure Message Only

Email

Phone

Text Message

F. Select the frequency. **Note:** Check the Every Occurrence check box to repeat the alert every time that the trigger occurs.



FREQUENCY:

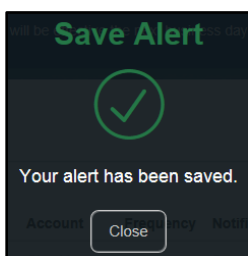
Every Occurrence

4. Once all the alert information is entered, click the Save button.



Save

5. Click Close to close the Save Alert confirmation.



Save Alert

✓

Your alert has been saved.

Close

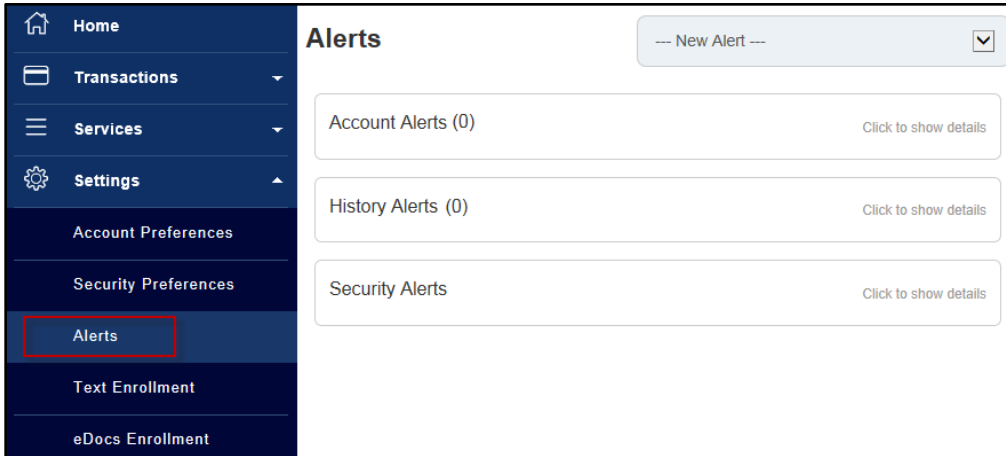
Managing Account & History Alerts in DFCU OnLine— Filters, continued

II. Editing Alerts

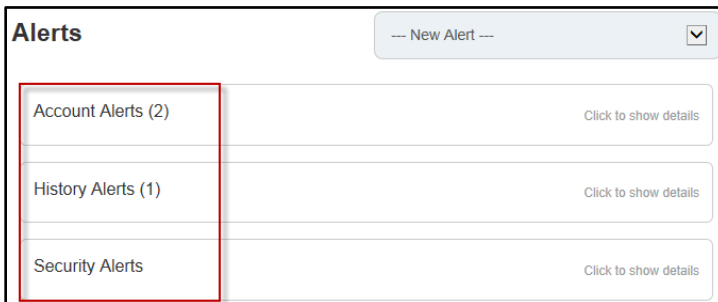
You can use the Alerts page to edit an existing alert. Any changes take effect immediately.

To **edit an existing** alert:

1. Select Alerts located under Setting in the Menu, the Alerts page appears.



2. Click the type of alert that you want to edit.



3. Click Edit on the existing alert that you want to edit, the Edit Alert page appears.

The screenshot shows the 'Edit Alert' page. At the top, it says 'Account Alerts (2)' and 'Click to hide details'. Below is a table with columns: Account, Frequency, Notification, and Enabled. Two alerts are listed, both with an 'Edit' button highlighted by a red box.

	Account	Frequency	Notification	Enabled	
When my Available Balance is less than \$100.00.	Checking	☉	Send me a SMS Text Message	<input checked="" type="checkbox"/>	Edit
When my Current Balance is less than \$100.00.	Checking	☉	Send me a SMS Text Message	<input checked="" type="checkbox"/>	Edit

4. Make any needed changes to the alert settings, and click Save.
5. Click Close to close the Save Alert confirmation.

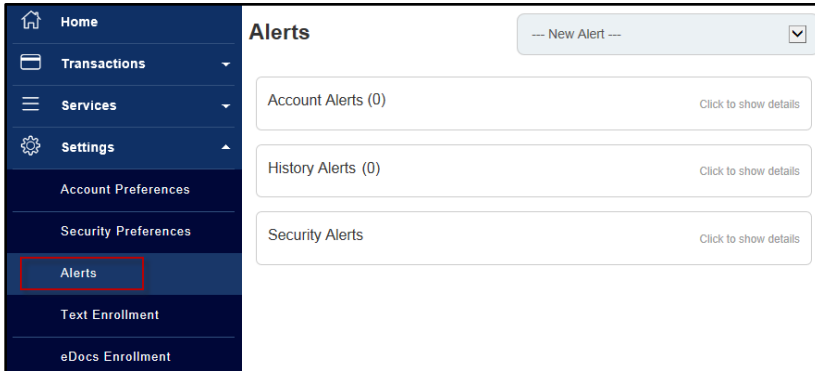
Managing Account & History Alerts in DFCU OnLine— Filters, continued

III. Enabling and Disabling Alerts

You can use the Alerts page to temporarily disable an existing alert and later enable it again.

To **disable or enable** an existing alert:

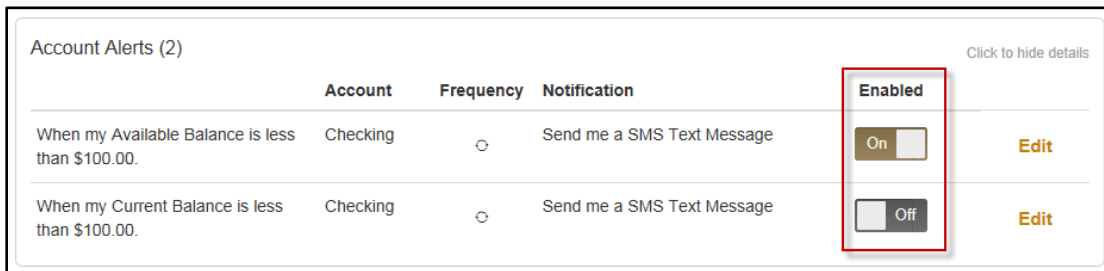
1. Select Alerts located under Setting in the Menu, the Alerts page appears.



2. Click the type of alert that you want to edit.



3. On the Alerts page, locate the existing alert, and then do one of the following in the Enabled column: Click **Off** to **disable** the alert –or– Click **On** to **enable** the alert.



4. Click Close to close the Save Alert confirmation.

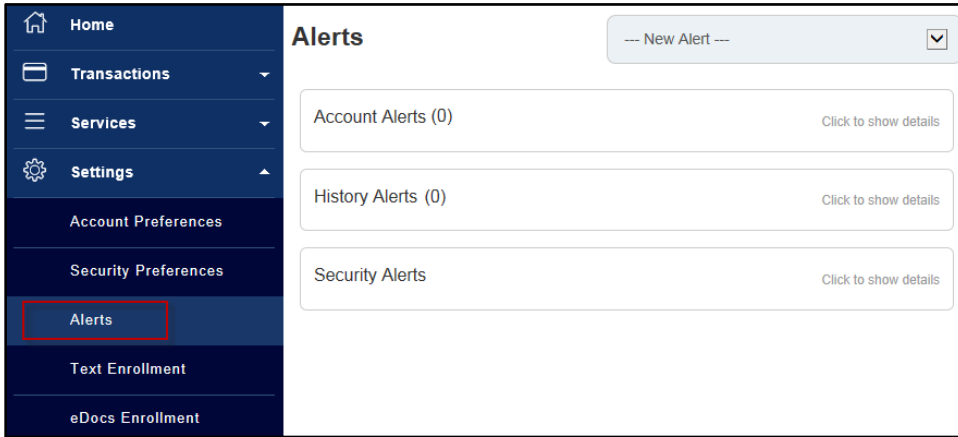
Managing Account & History Alerts in DFCU OnLine— Filters, continued

IV. Deleting an Alert

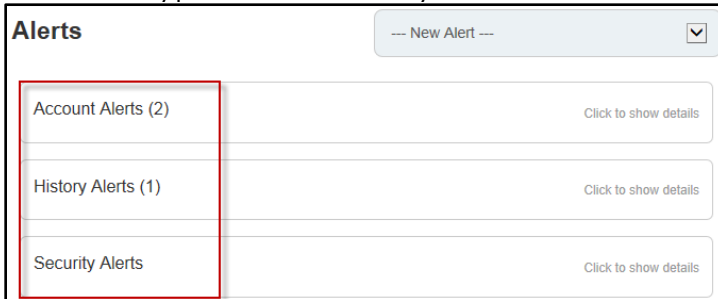
You can use the Alerts page to delete an alert that you no longer need. Deleting an alert removes it immediately and permanently.

To **delete** an alert:

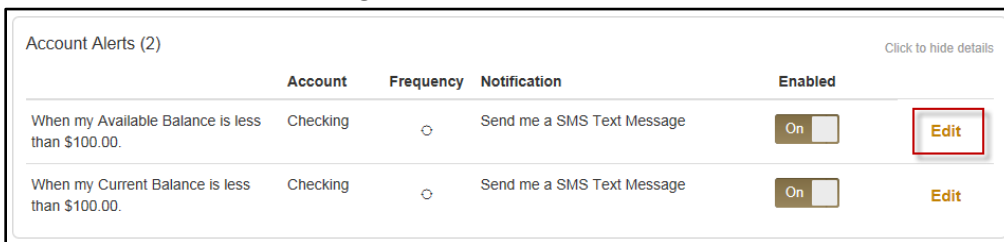
1. Select Alerts located under Setting in the Menu, the Alerts page appears.



2. Click the type of alert that you want to delete.

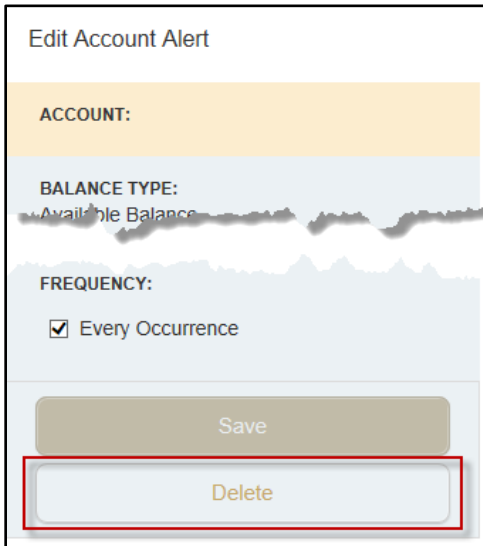


6. Click Edit on the existing alert that you want to edit, the Edit Alert page appears.



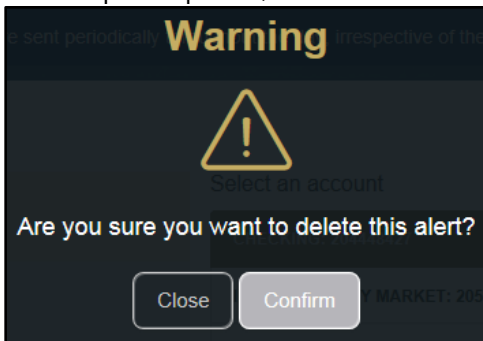
Managing Account & History Alerts in DFCU OnLine— Filters, continued

3. Click Delete.



The screenshot shows the 'Edit Account Alert' interface. It includes sections for 'ACCOUNT:', 'BALANCE TYPE:' (with 'Available Balance' selected), and 'FREQUENCY:' (with 'Every Occurrence' checked). At the bottom, there are two buttons: 'Save' and 'Delete'. The 'Delete' button is highlighted with a red rectangular border.

4. When prompted, click Confirm to delete the alert.



5. When the delete is complete, a message appears, click Close.

