# Mobile Alerts Setup Guide

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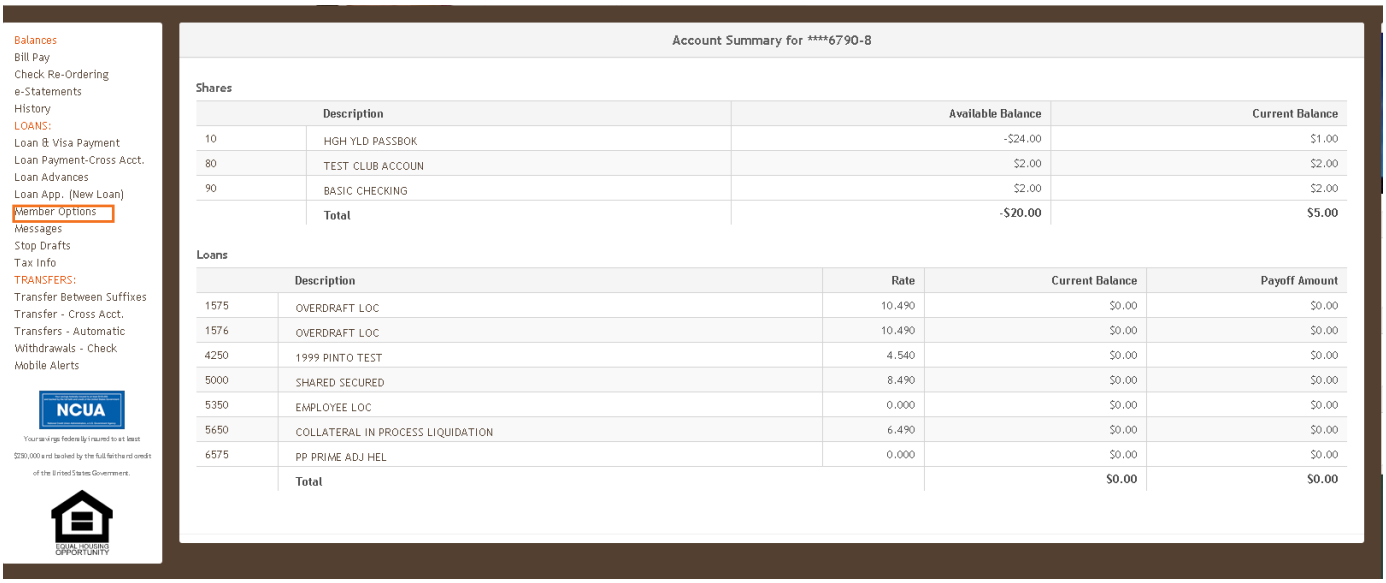
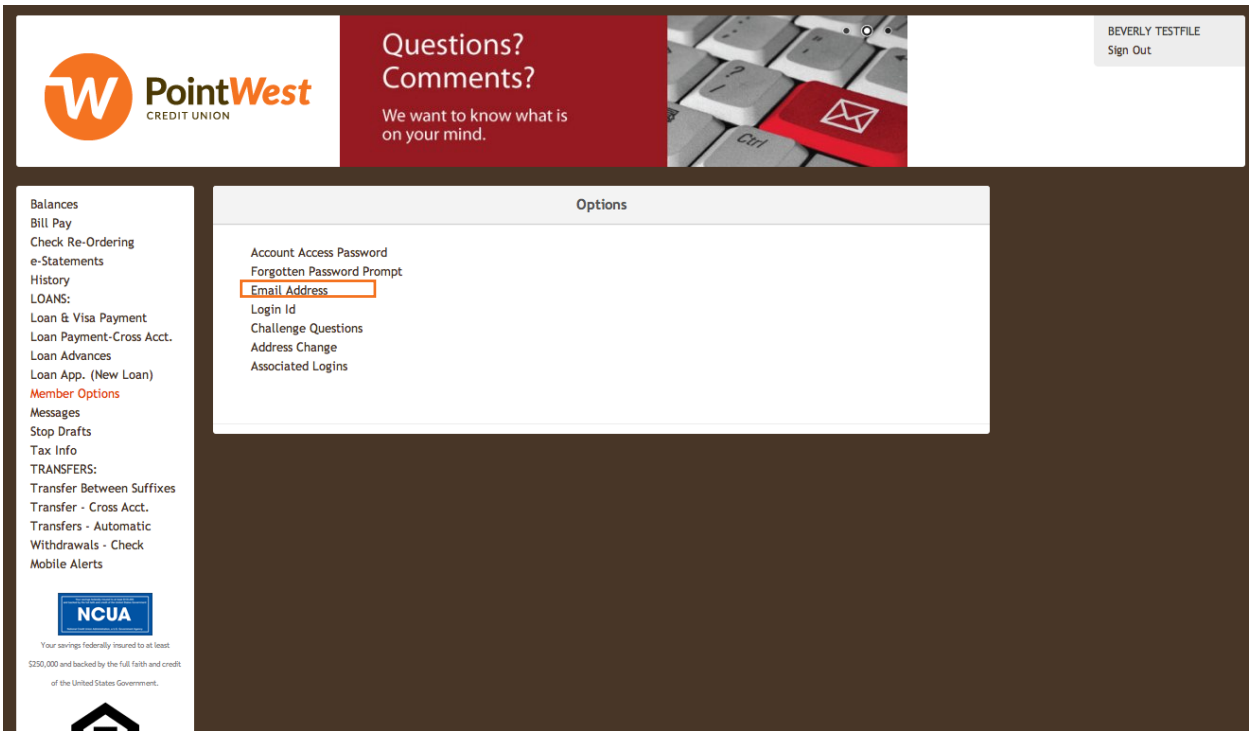
# Adding an Email Address to Online Banking

1. Log on to Online Banking at www.pointwestcu.com

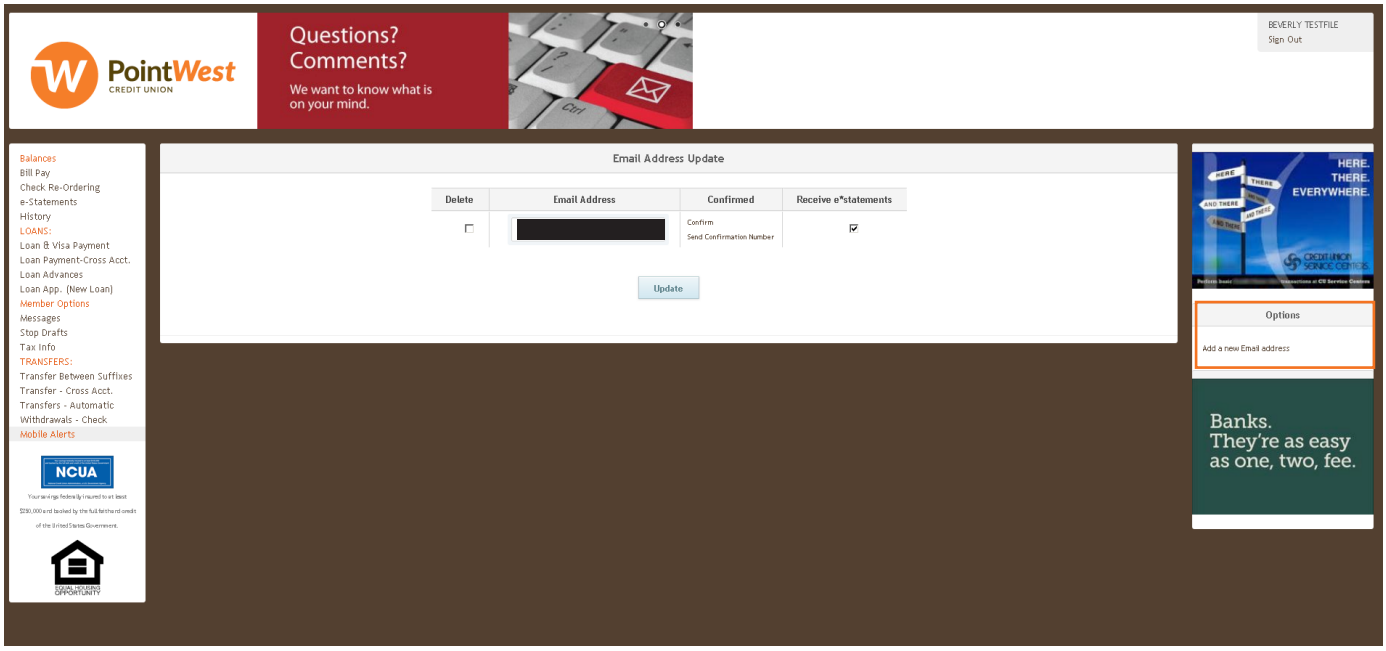
2. Click on the **Member Options** link in the middle of the left-hand menu



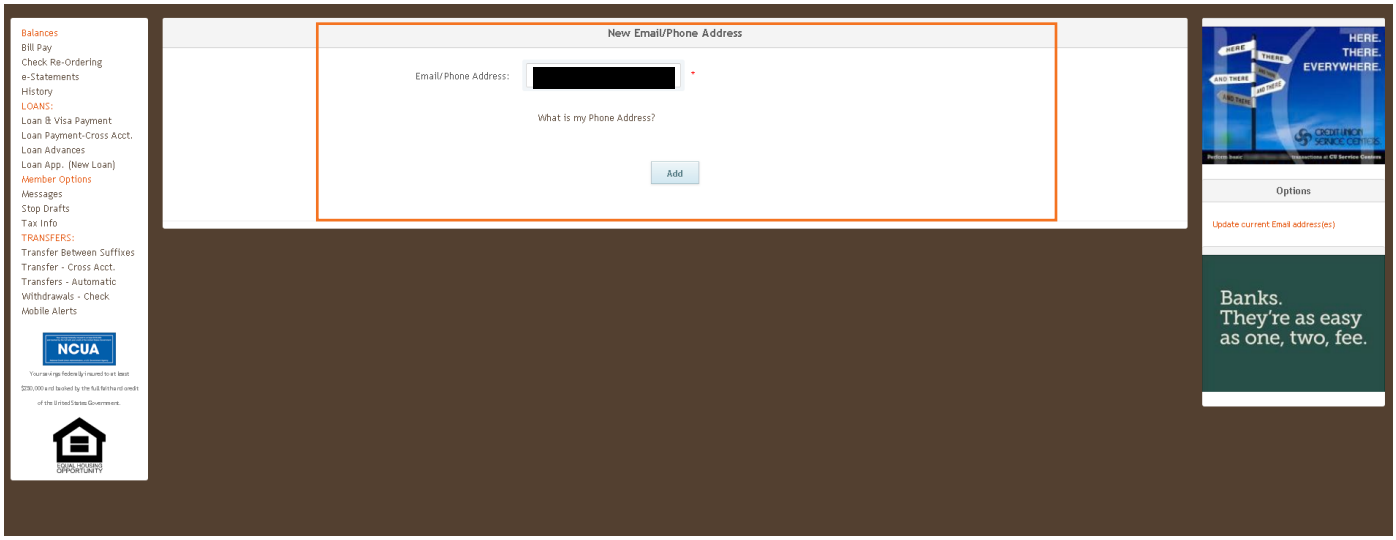

3. Click the **Email Address** link.



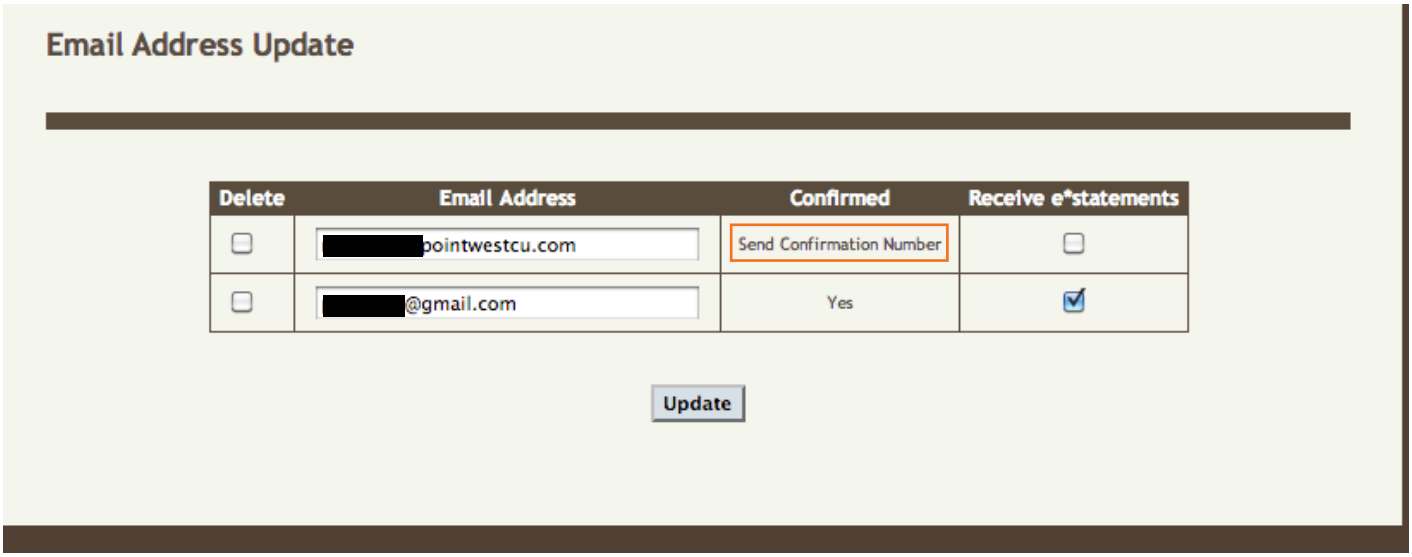
4. Click the **Add a new Email address** link in the “Options” box.



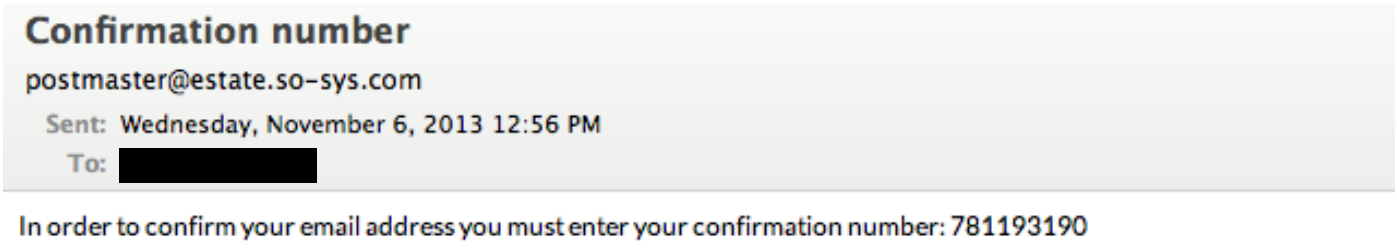

5. Enter the desired email address and click the **Add** button.



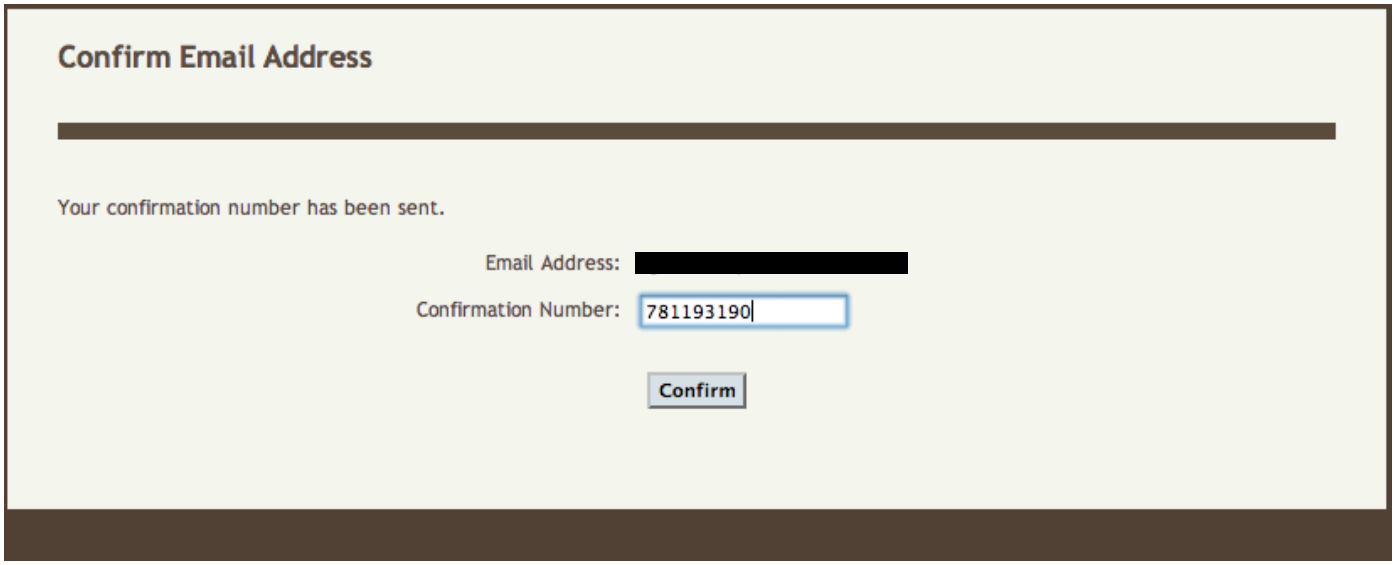
6. In order to confirm the email address, you will need to click the **Send Confirmation Number** link associated with the new email address. An automated email with the need confirmation number will be sent the email address in question.



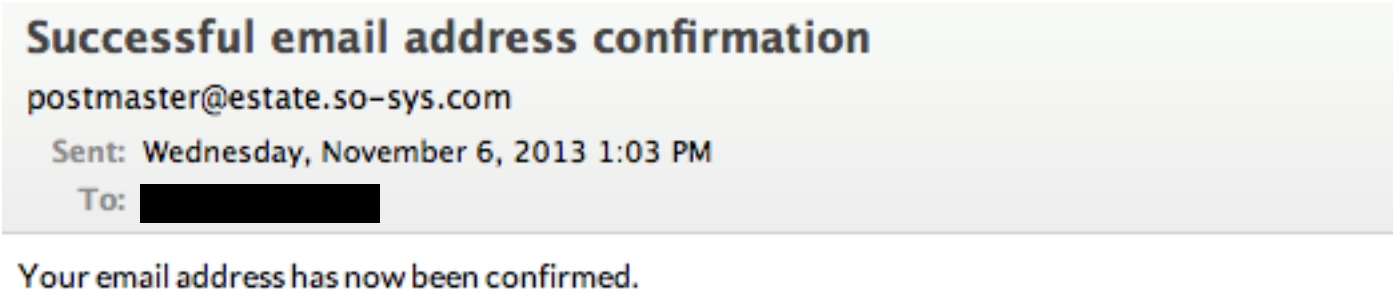

7. Once you receive the email, copy the confirmaion number- you will need it to finish the confirmation process.



8. Input the confirmation numberon the “Confirm Email Address Screen” and click the **Confirm** button. If you need to resend the confirmation number, you can click the **Resend confirmation number** link.



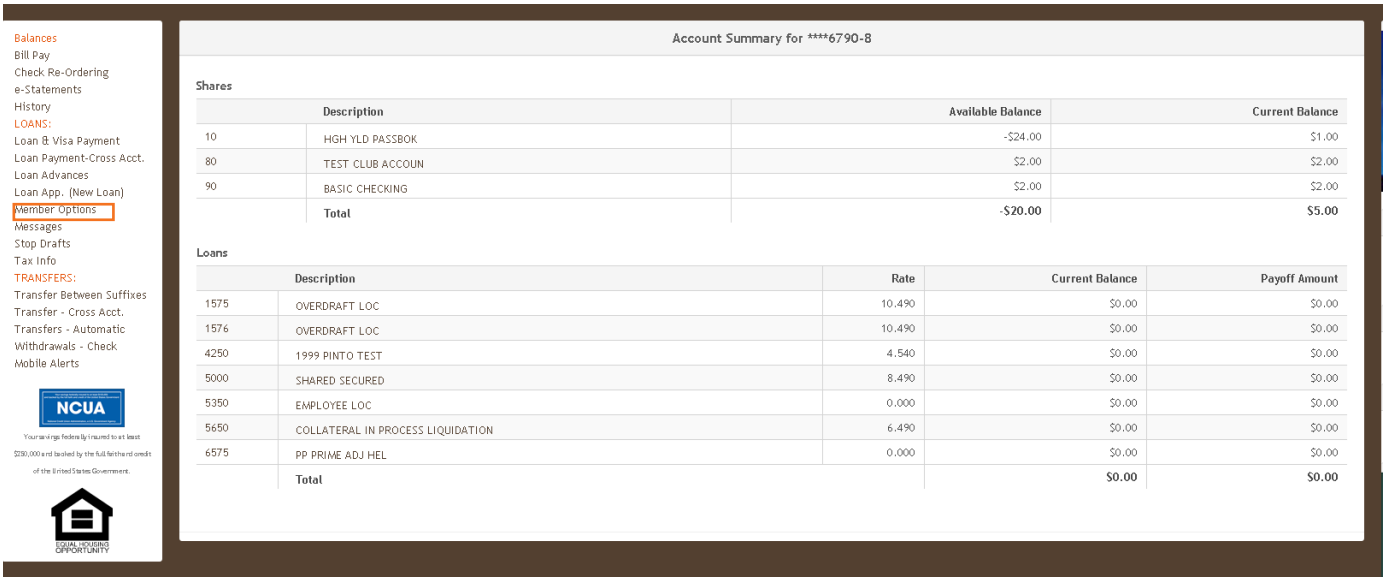

9. Once you have successfully input the confirmation number, you should receive a confirmation email like the one below. The email address is now correctly configured to receive mTeller notifications.



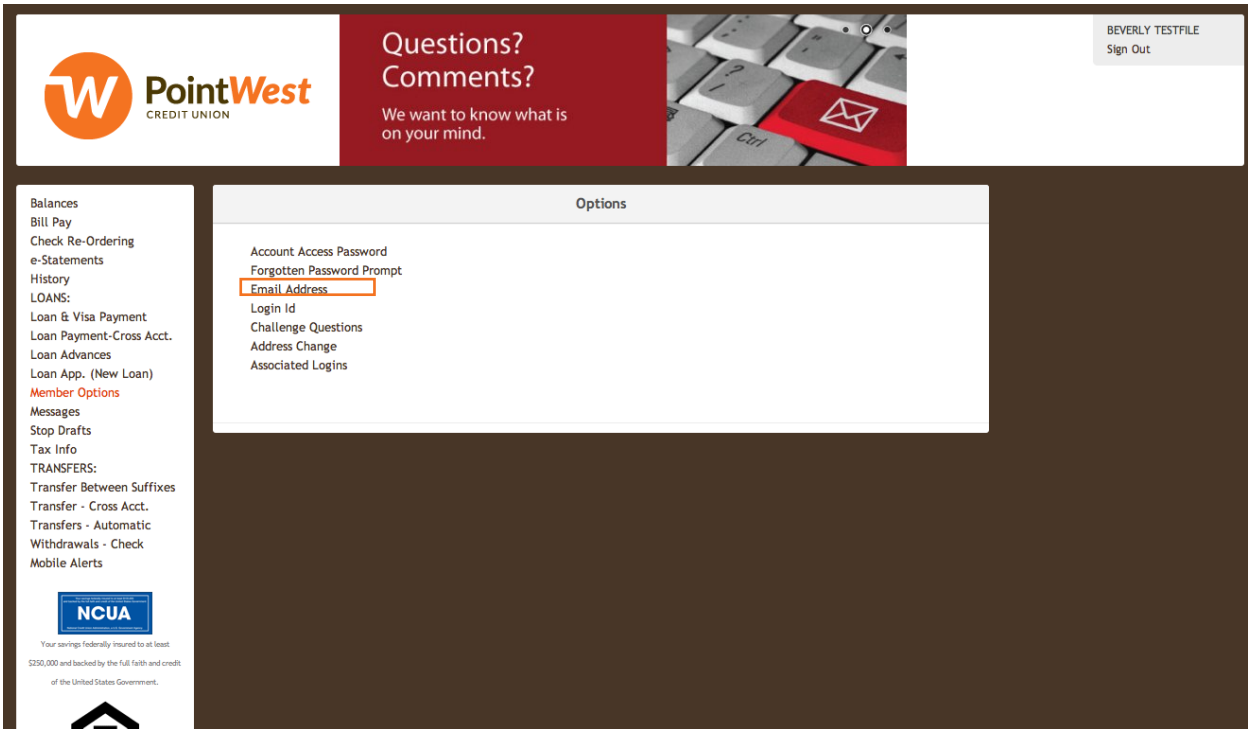
# Adding an Mobile Number to Online Banking

1. Log on to Online Banking at www.pointwestcu.com.

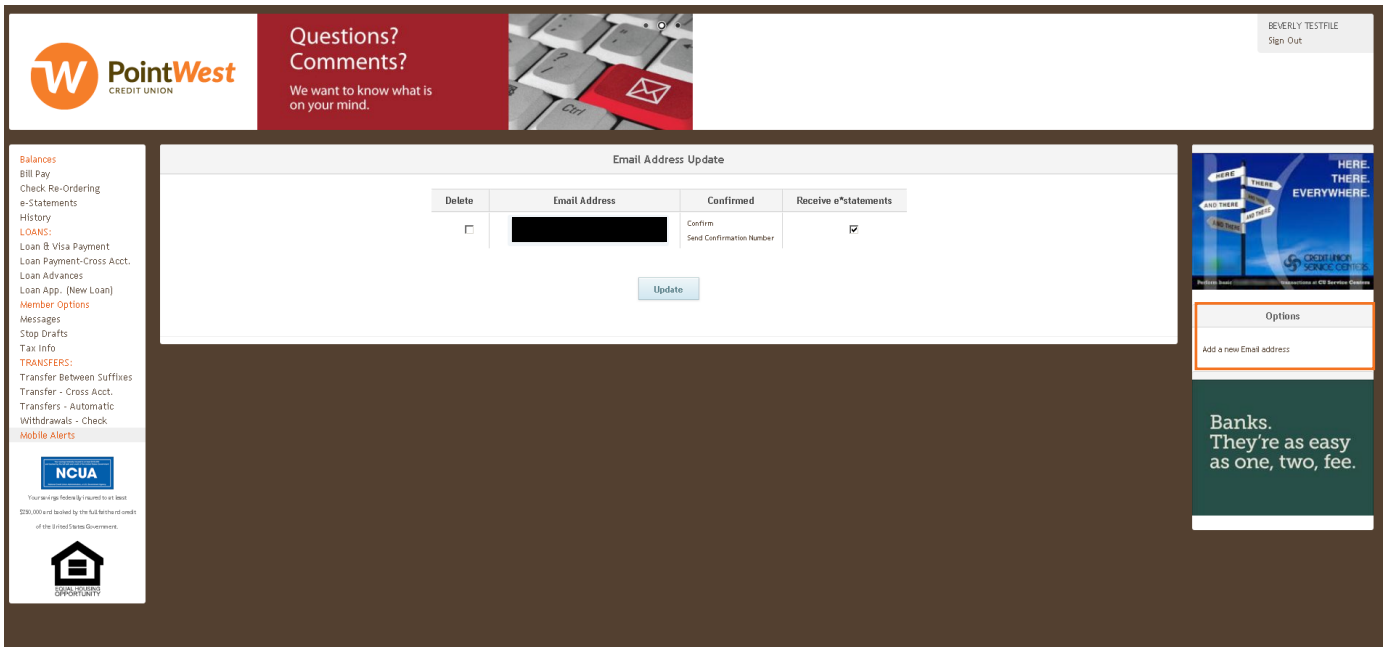
2. Click on the **Member Options** link in the middle of the left-hand menu.



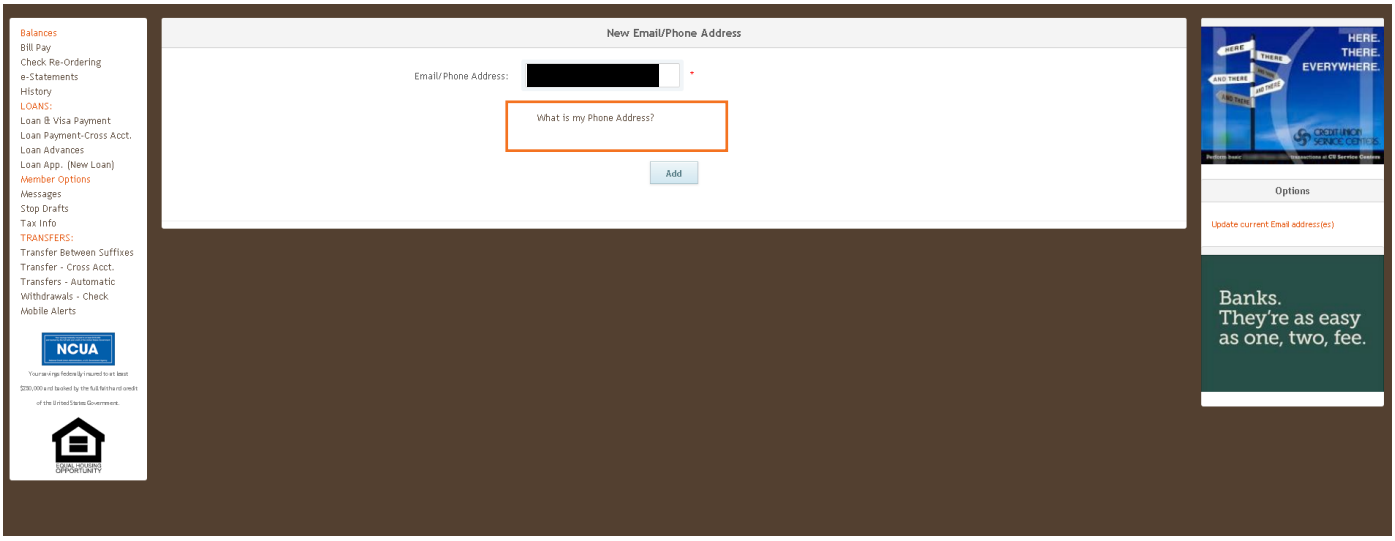

3. Click the Email Address link.



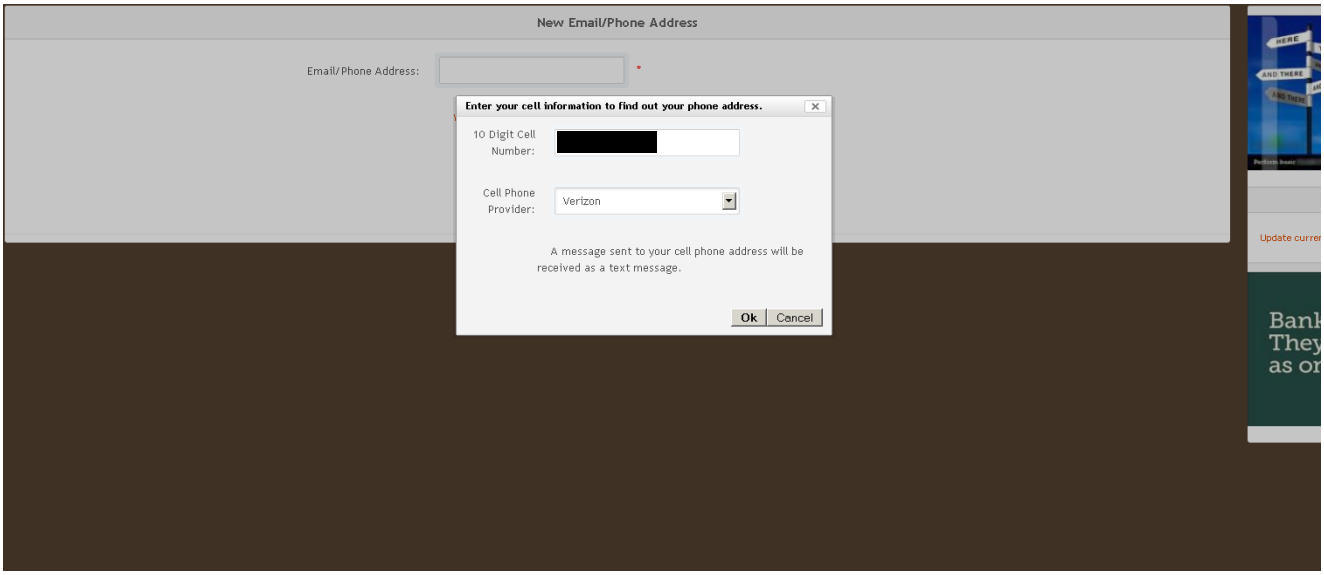
4. Click the **Add a New Email Address** link in the "Options" box on the right hand side.



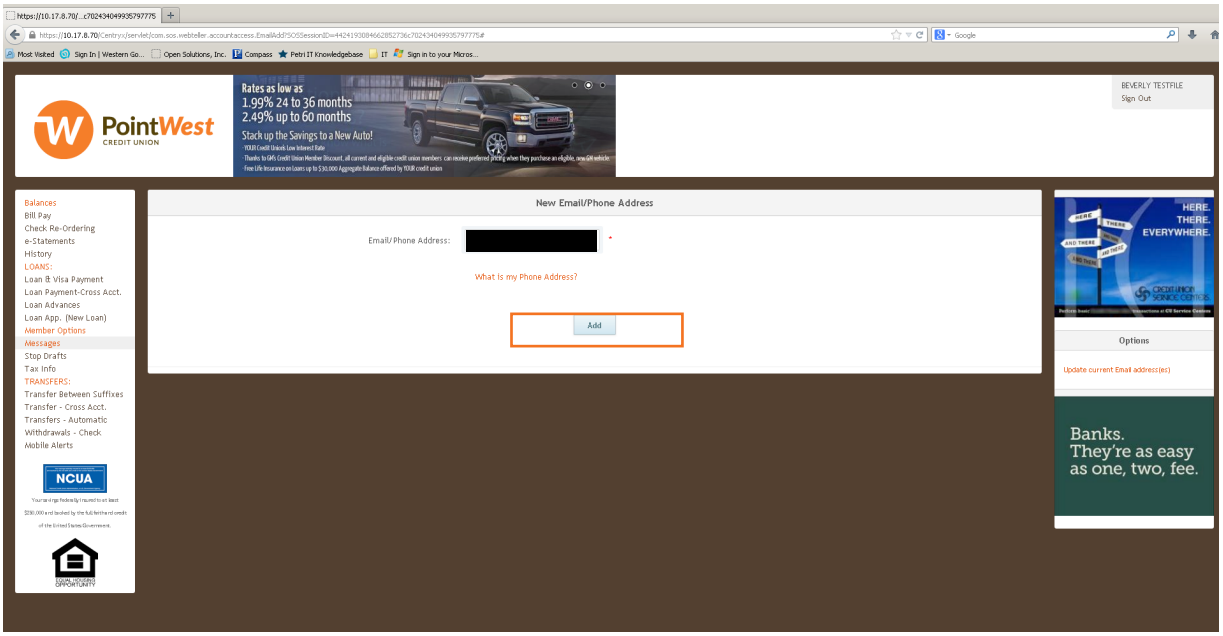

5. To enter the desired mobile number, click the **What is my Phone Address** link.



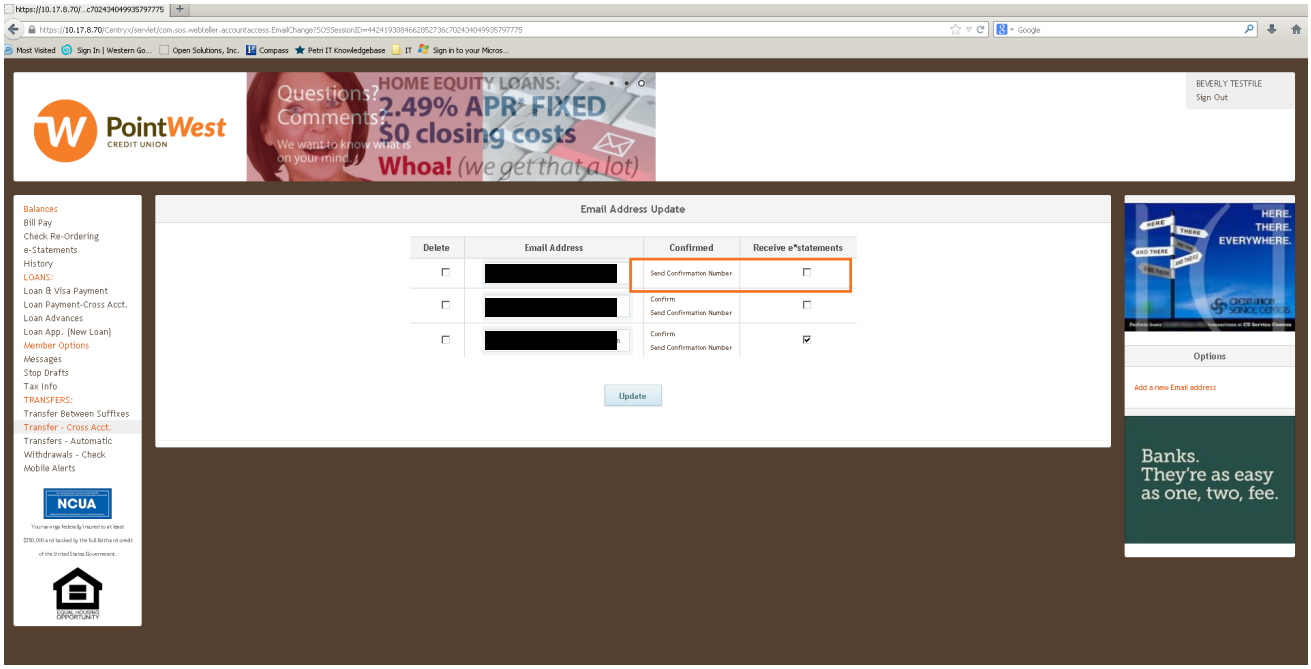
6. Enter your 10 digit mobile number (no spaces or special characters) in the “10 digit Cell Number” field and then choose your mobile provider from the “Cell Phone Provider” drop-down menu. When complete, click the **Ok** button.



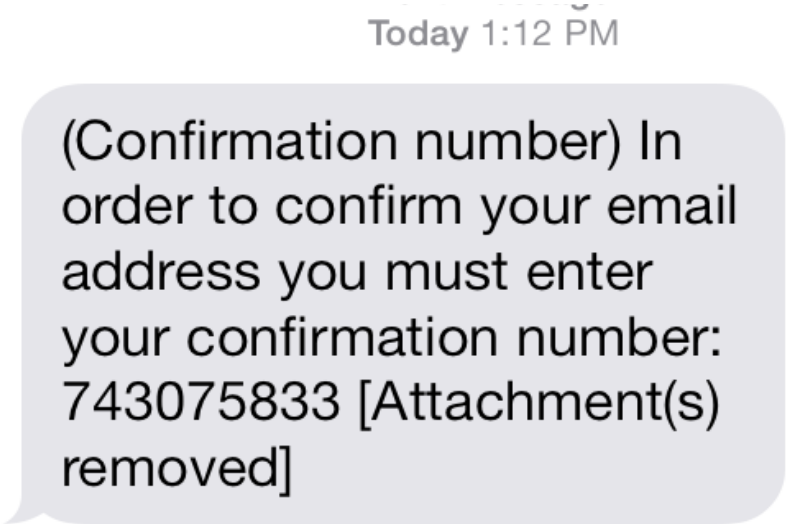

7. You should now see your mobile number followed by a domain address in the “Email/Phone Address” field. Click the **Add** button to add the mobile number.



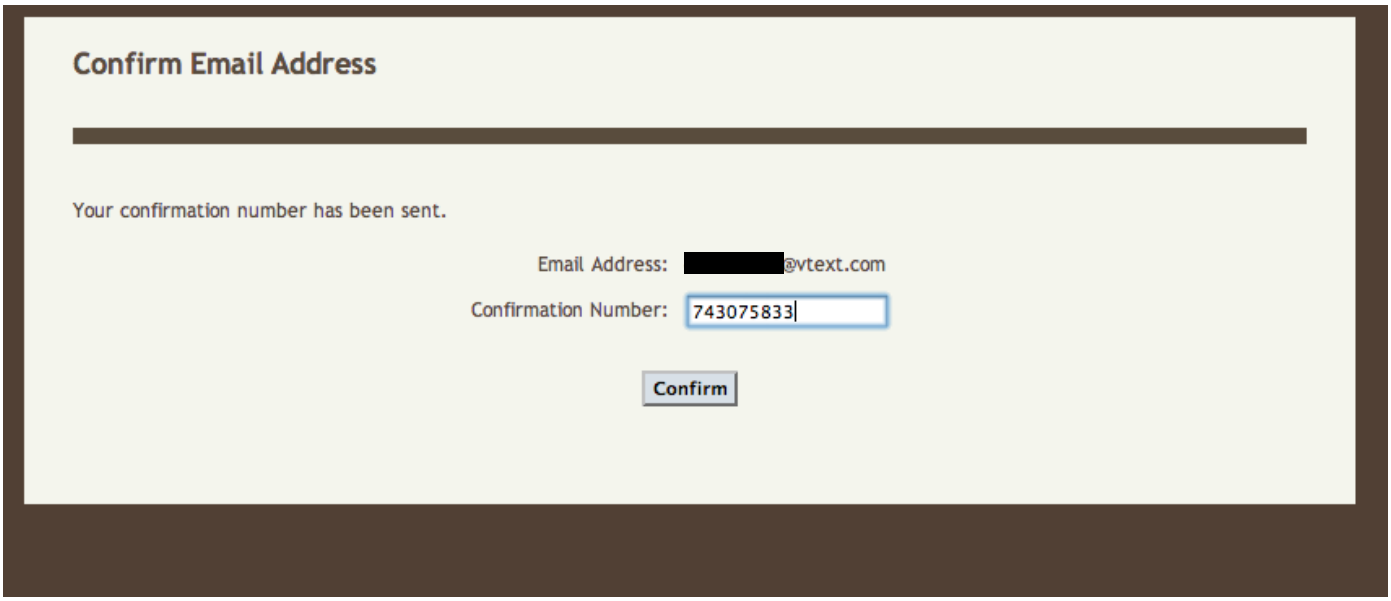
8. In order to confirm your mobile number, you will need to click the **Send Confirmation Number** link associated with the new mobile number. An automated text message with the needed confirmation number wil be sent the mobile number in question.



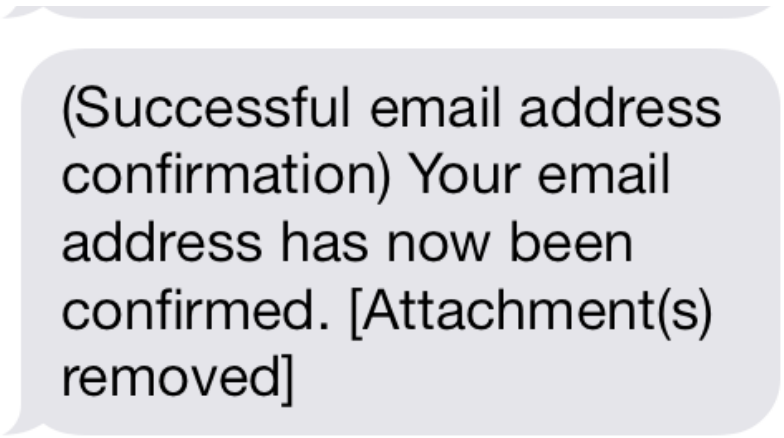

9. Once you receive the text message, copy the confirmation number - you will need it to finsh the confirmation process.



10. Input the confirmation number on the "Confirm Email Address Screen" and click the **Confirm** button. If you need to resend the confirmation number, you can click the **Resend confirmation number** link.

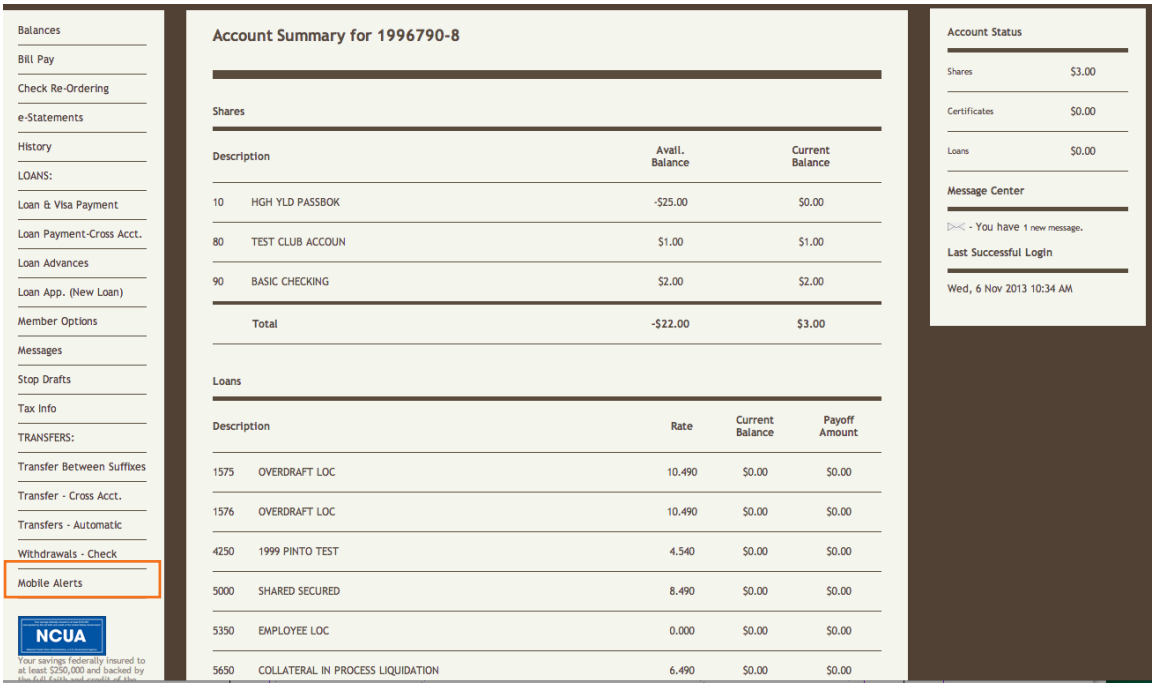



11. Once you have successfully input the confirmation number, you should receive a confirmation text message like the one below. The mobile number is now correctly configured to receive mTeller notifications.

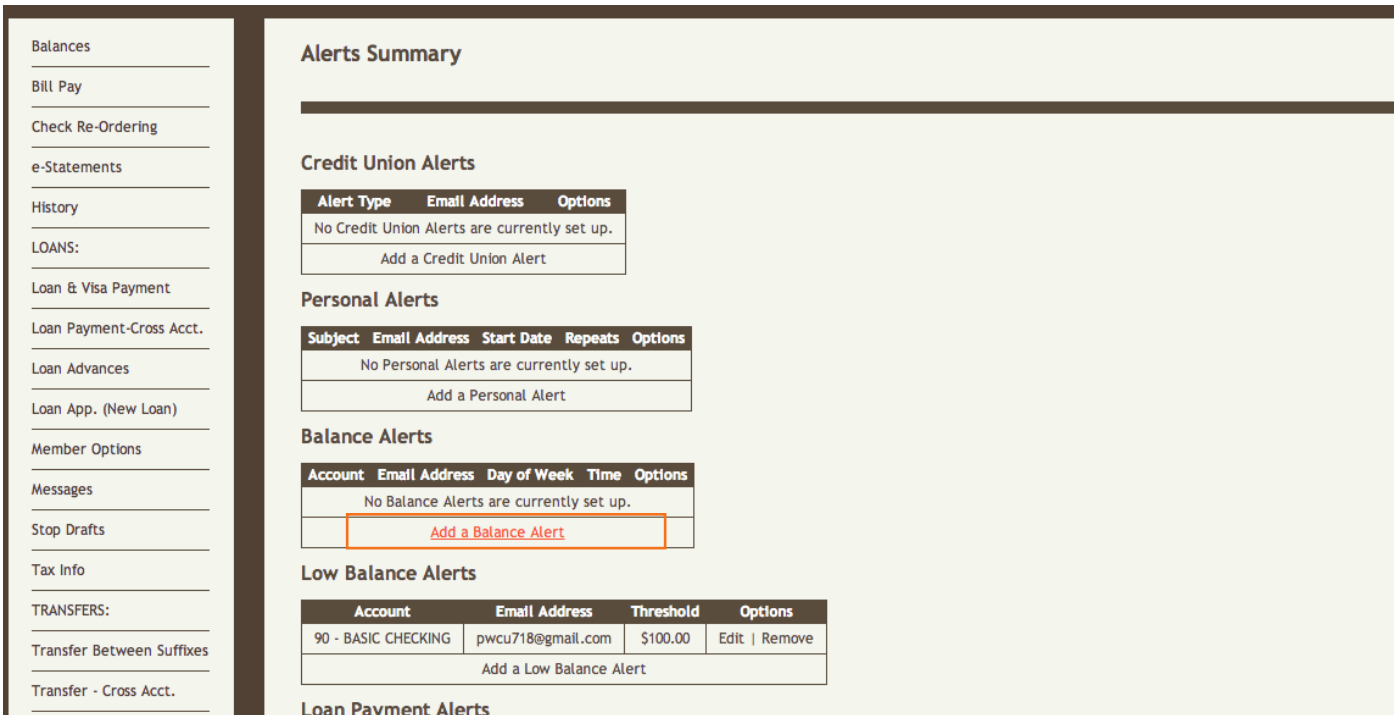


# Setting up a Balance Alert

1. Log on to Online Banking at www.pointwestcu.com.
2. Click on the **Mobile Alerts** link at the bottom of the left-hand menu.




3. To add a Balance Alert, click the **Add a Balance Alert** link.

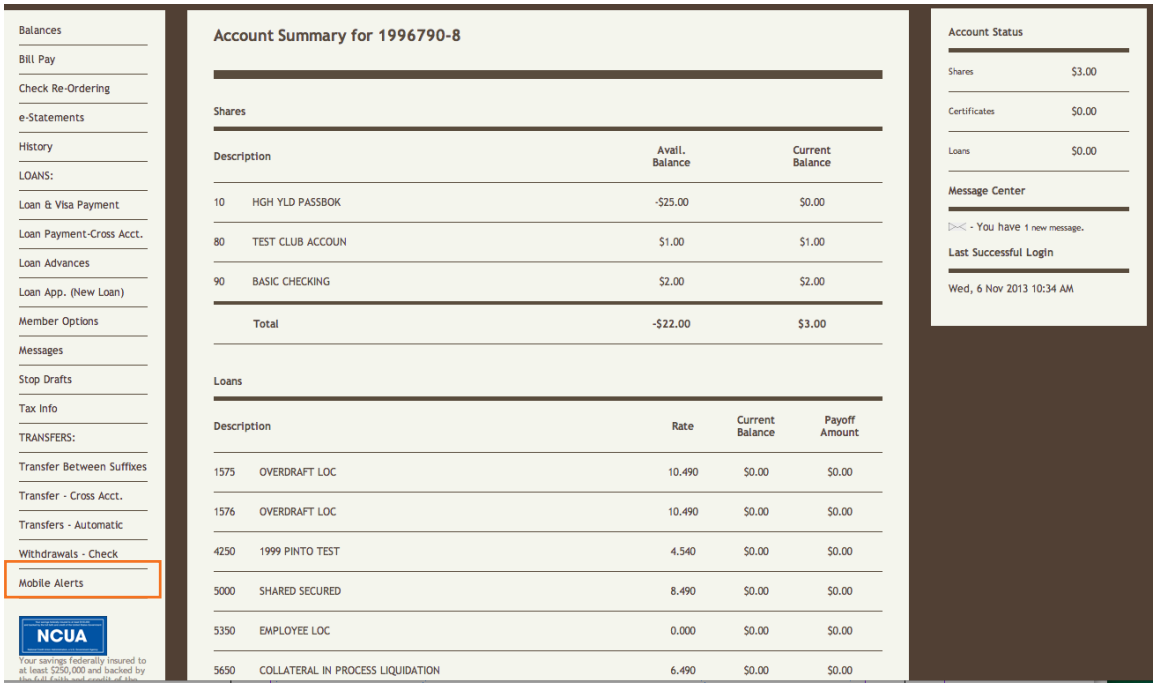


4. FIll out the necessary information, then click the **Add** button to complete the Balance Alert setup.
   - **Email Address**: Select the email address or phone number you wish to have the alert sent to.
   - **Suffix:** Select the suffix you would like the balance alert to reference.
   - **Day:** Select the daily balance alert or select the day of the week you would like to receive each week.
   - **Time:** Select the time you would like to receive the balance alert.

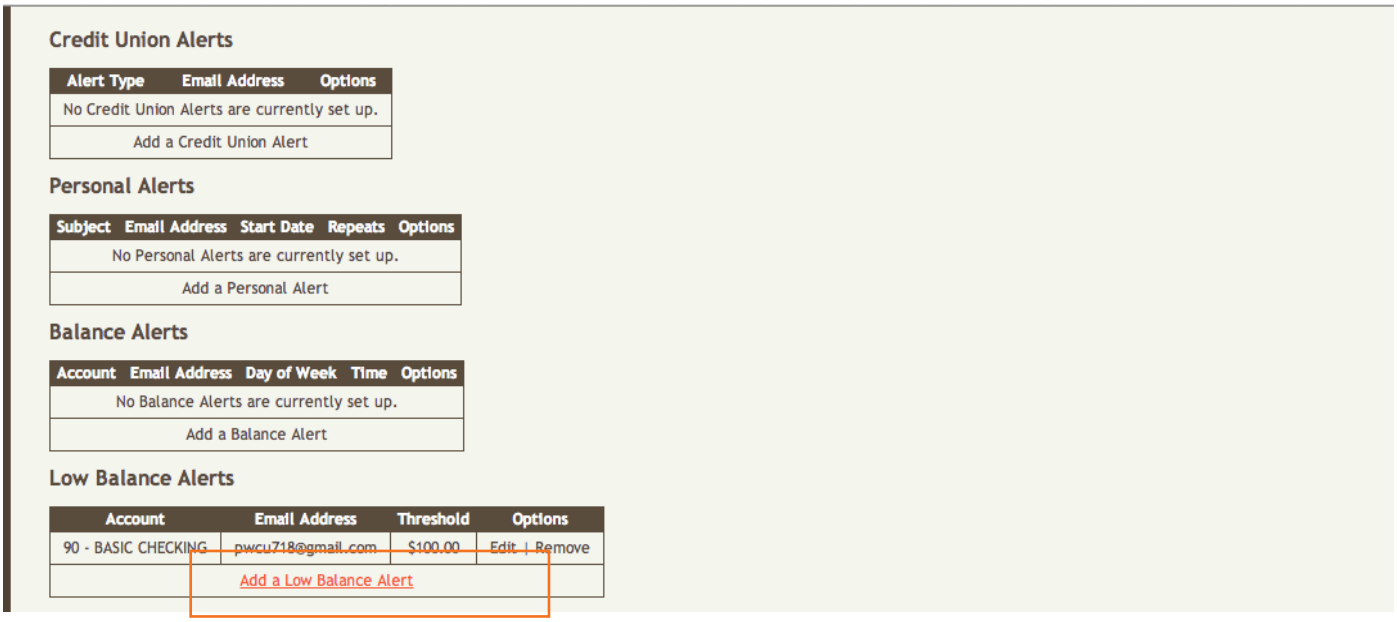
# Setting up a Low Balance Alert

1. Log on to Online Banking at www.pointwestcu.com.

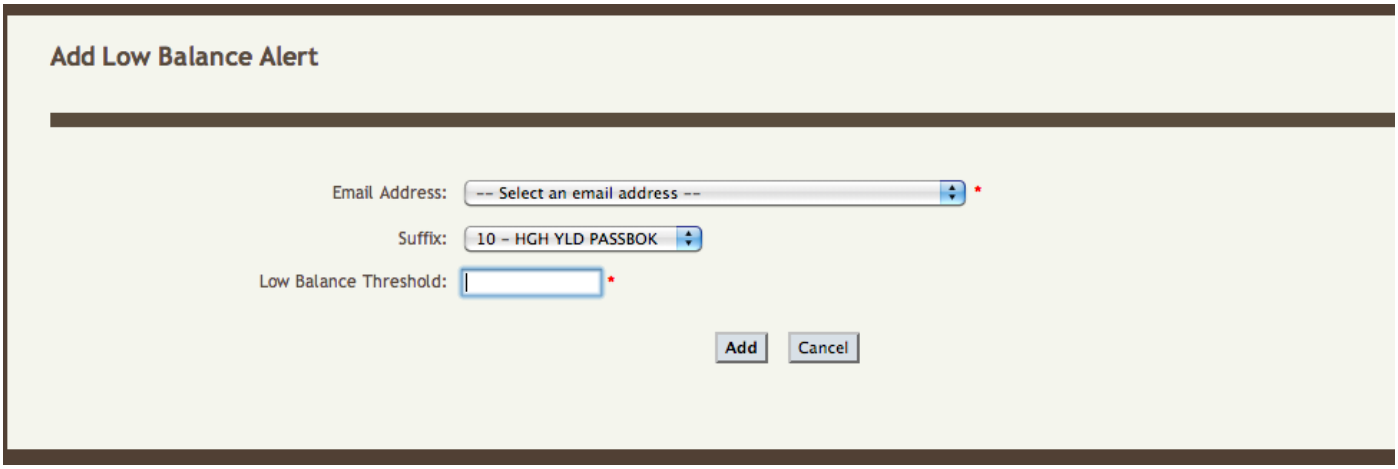
2. Click on the **Mobile Alerts** link at the bottom of the left-hand menu.




3. To add a Low Balance Alert, click the **Add a Low Balance Alert** link.

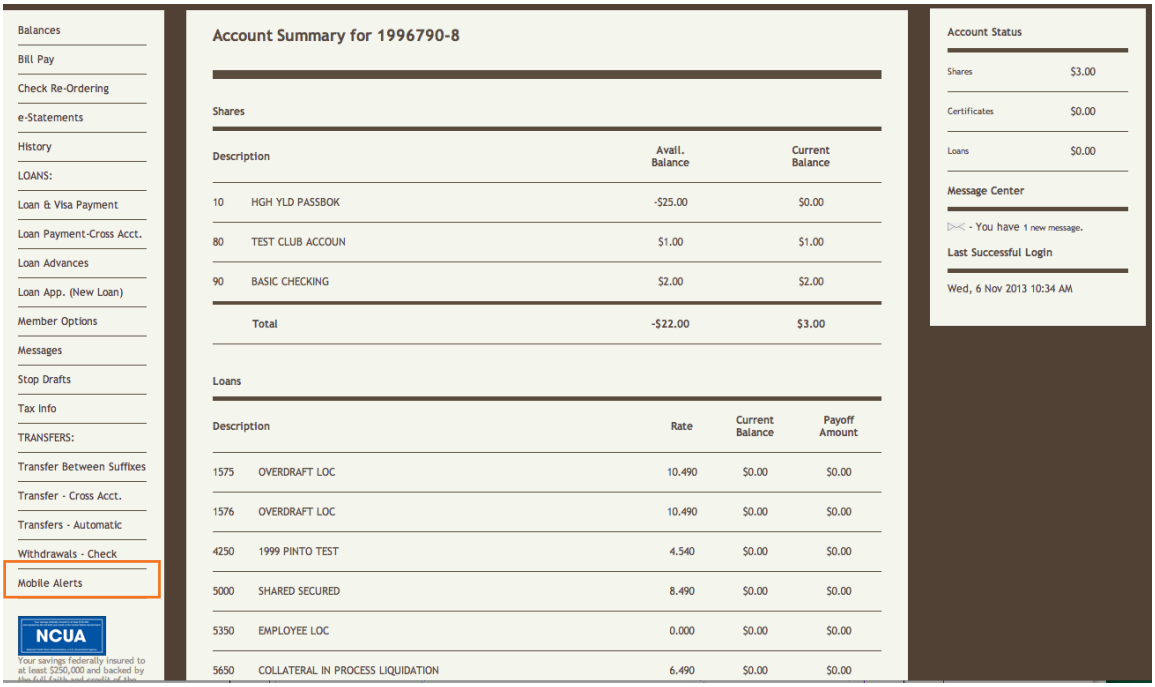


4. FIll out the necessary information, then click the **Add** button to complete the Low Balance Alert setup.
   - **Email Address**: Select the email address or phone number you wish to have the alert sent to.
   - **Suffix:** Select the suffix you would like the balance alert to reference.
   - **Low Balance Threshold:** Select the threshold balance for your alert (max tow decimal points).

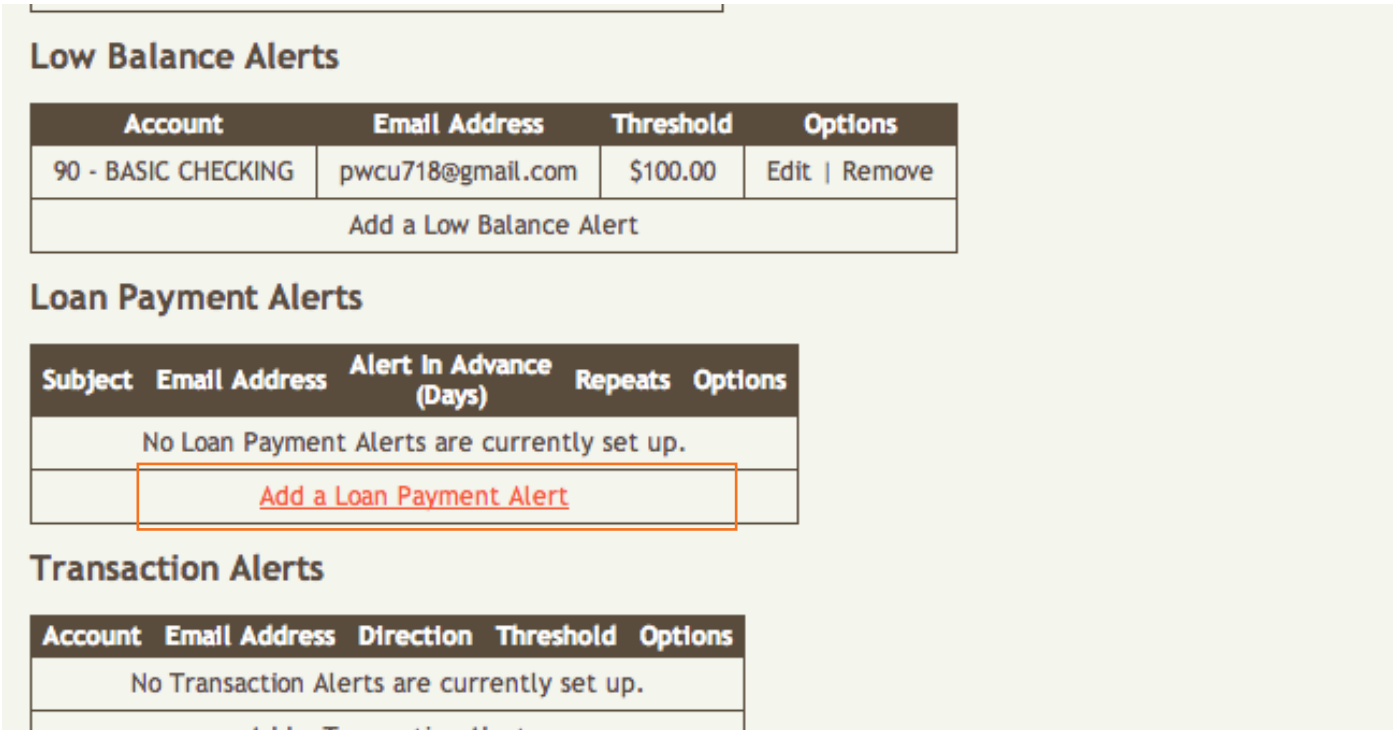


# Setting up a Loan Payment Alert

1. Log on to Online Banking at www.pointwestcu.com.
2. Click on the **Mobile Alerts** link at the bottom of the left-hand menu.




3. To add a Loan Pyament Alert, click the **Add a Loan Payment Alert** link.

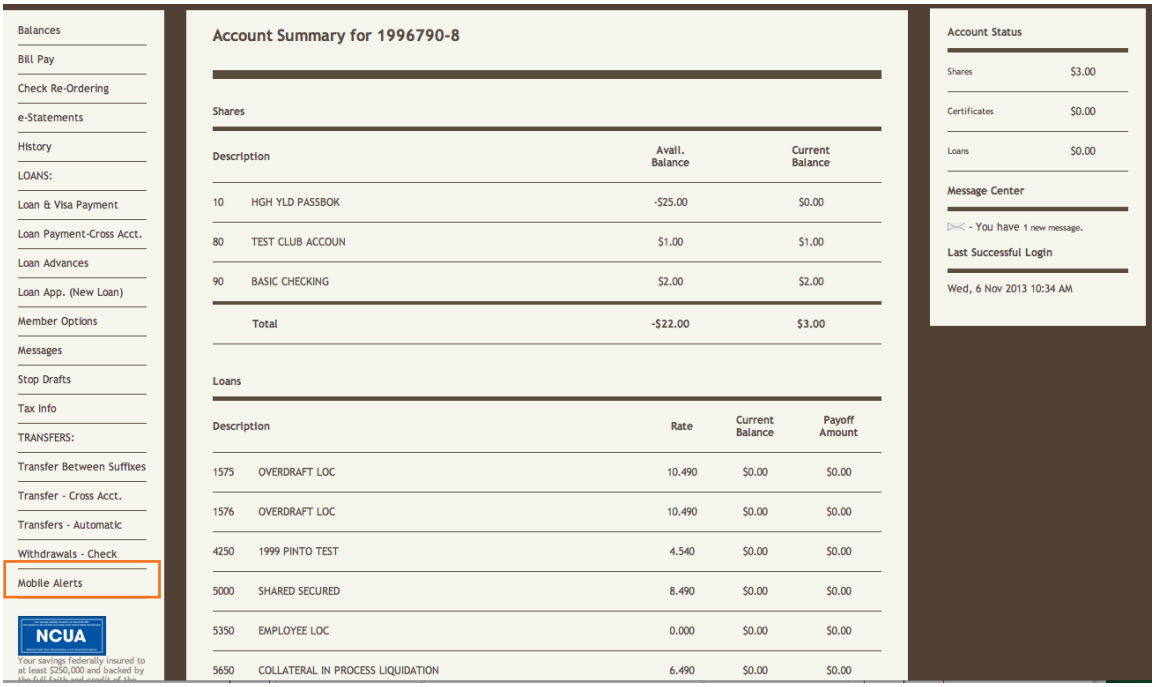


4. FIll out the necessary information, then click the **Add** button to complete the Balance Alert setup.

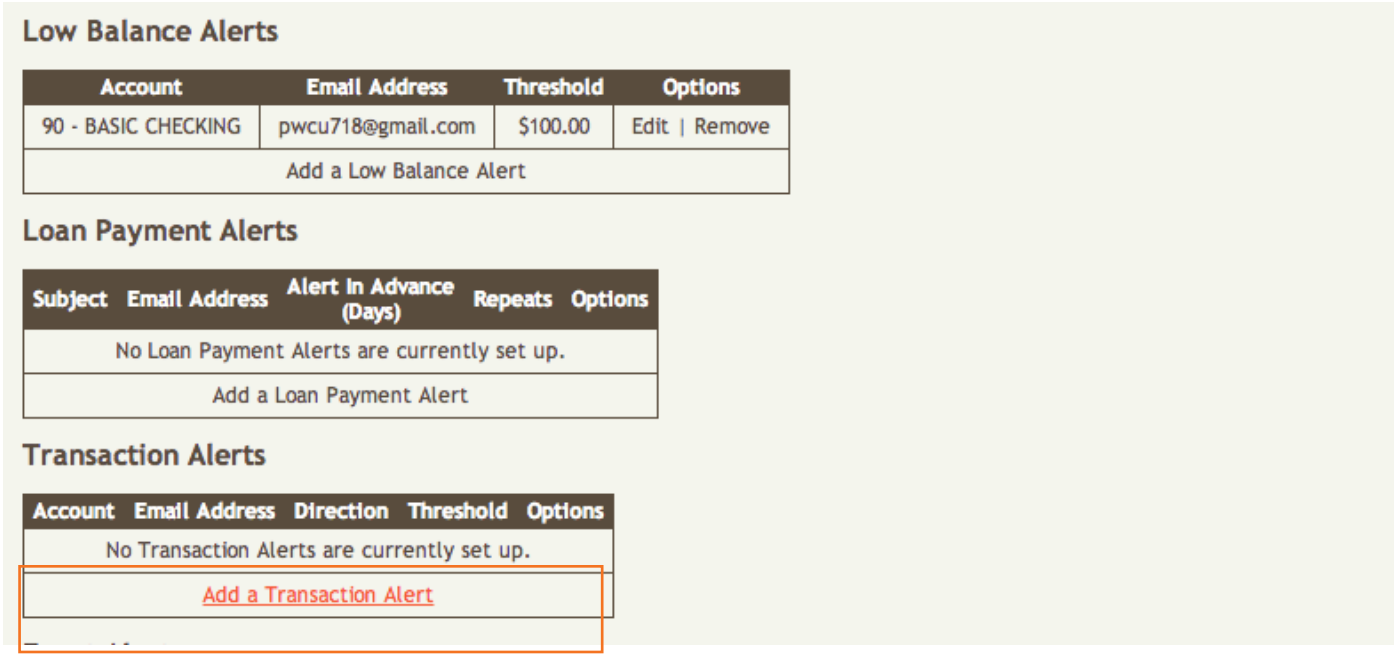
- **Alert for Loan**: Select the loan suffix you would like the alert to reference.
- **Recipient:** Select the email address or phone number you wish to have the alert sent to.
- **Alert Me Days in Advance:** Enter how many days ahead of your loan due date you would like to receive the alert.
- **Repeats:** Select whether the alert is sent only once or repeats every day until the loan payment is due.

# Setting up a Transaction Alert

1. Log on to Online Banking at www.pointwestcu.com.
2. Click on the **mTeller** link at the bottom of the left-hand menu.

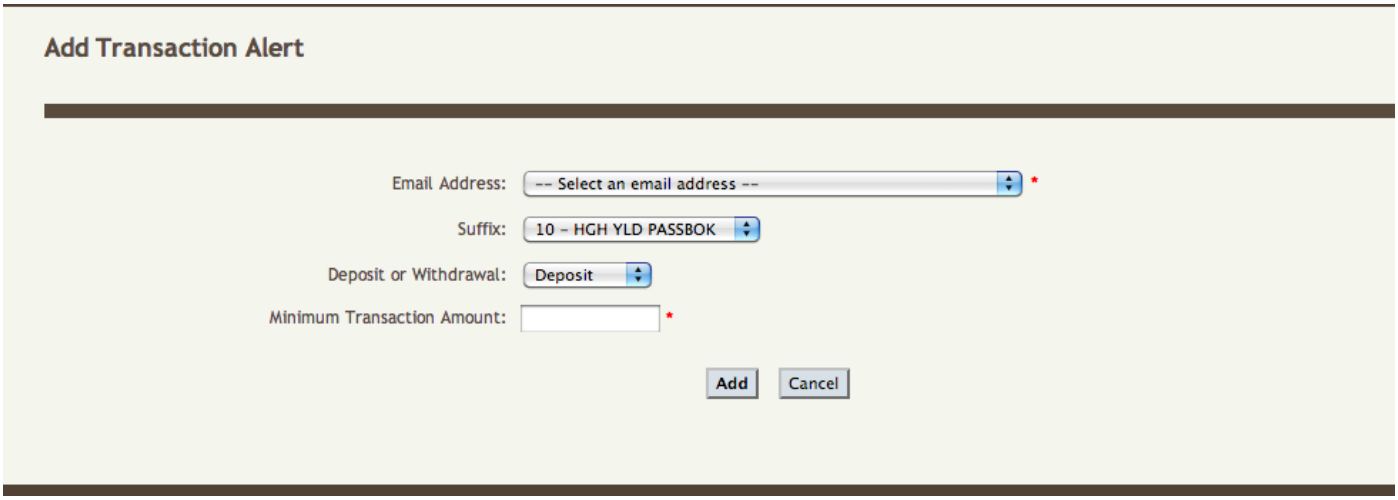



3. To add a Transaction Alert, click the **Add a Transaction Alert** link.



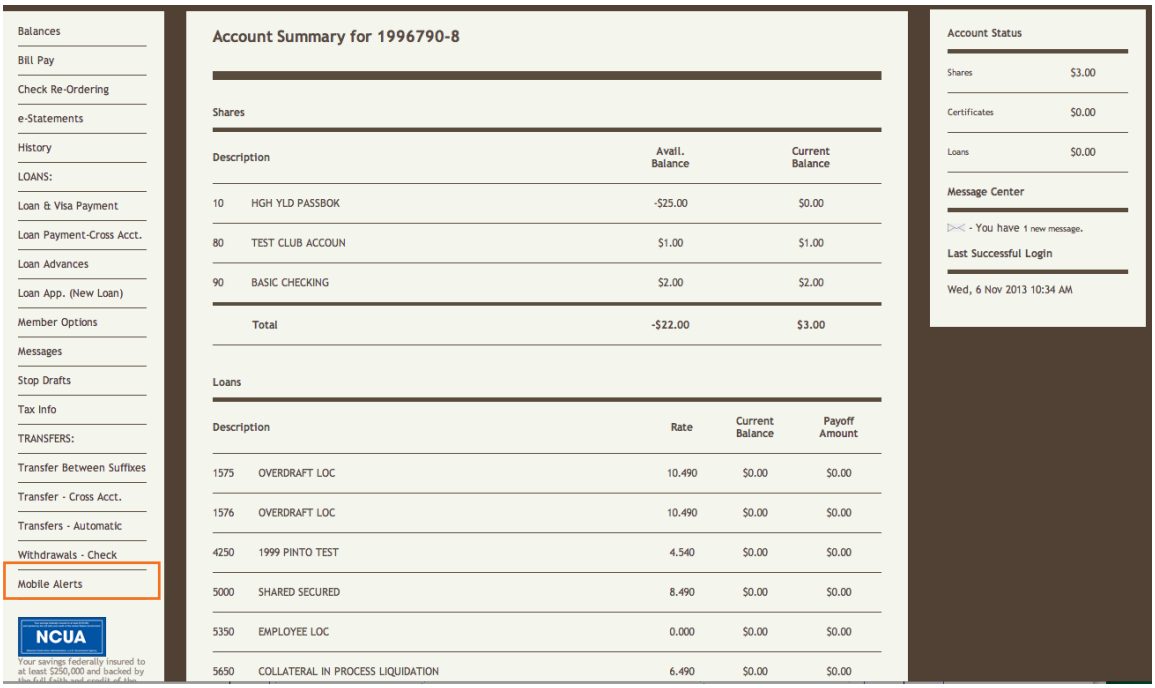
4. FIll out the necessary information, then click the **Add** button to complete the Balance Alert setup.

- **Email Address**: Select the email address or phone number you wish to have the alert sent to.
- **Suffix:** Select the suffix you would like the balance alert to reference.
- **Deposit or Withdrawal:** Select whether you want to be alerted of deposits or withdrawals with this alert
- **Minimum Transaction Amount:** Select the minimum transaction amount for your alert (max two decimal points).

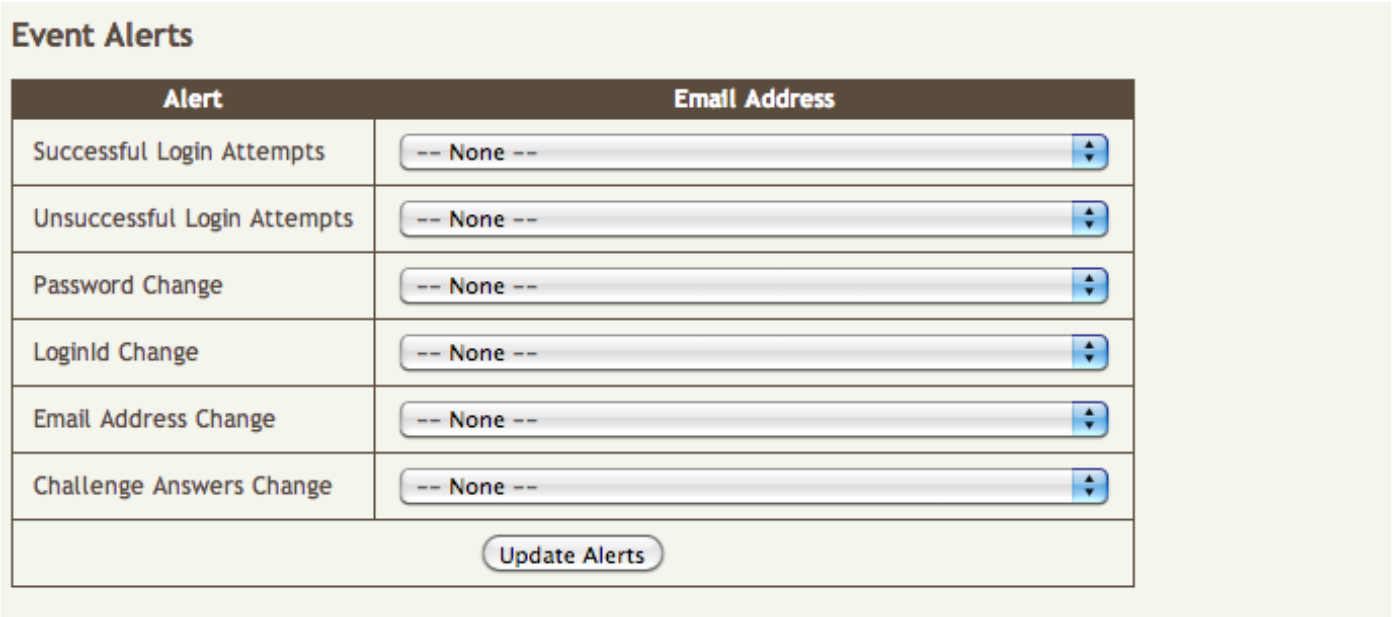


# Setting up Event Alerts

1. Log on to Online Banking at www.pointwestcu.com.
2. Click on the **mTeller** link at the bottom of the left-hand menu.

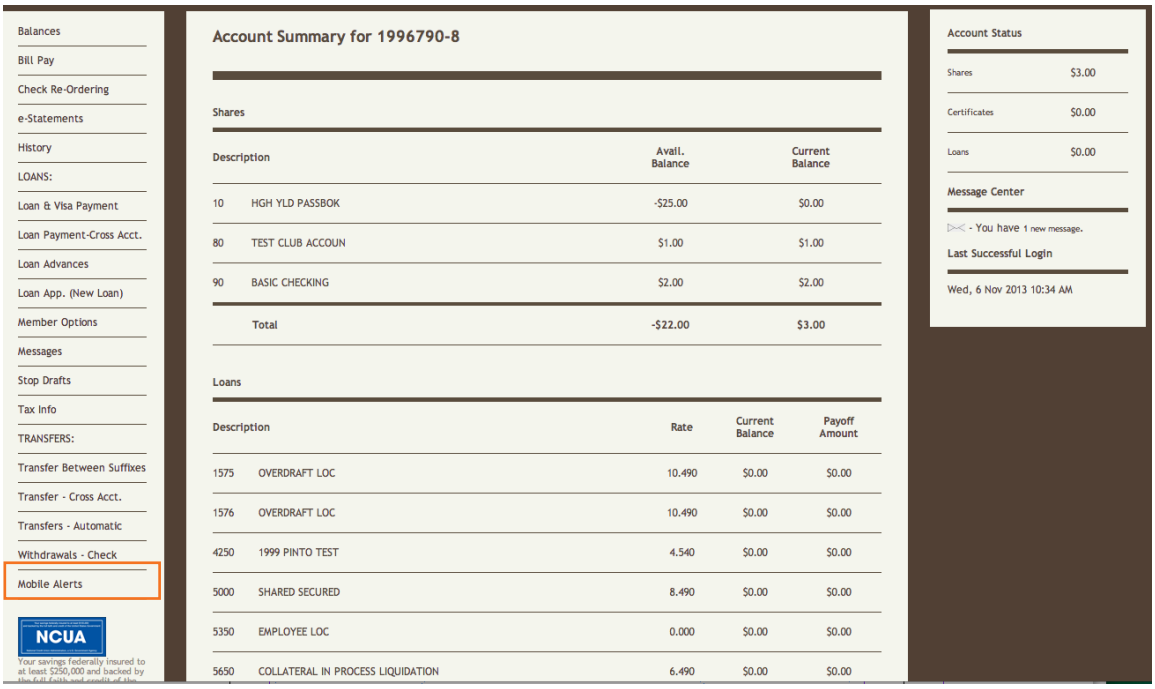



3. Under “Event Alerts” you can determine whether or not you receive specific alerts by selecting the email address or phone number you would like the alert sent to and then click **Update Alerts.**

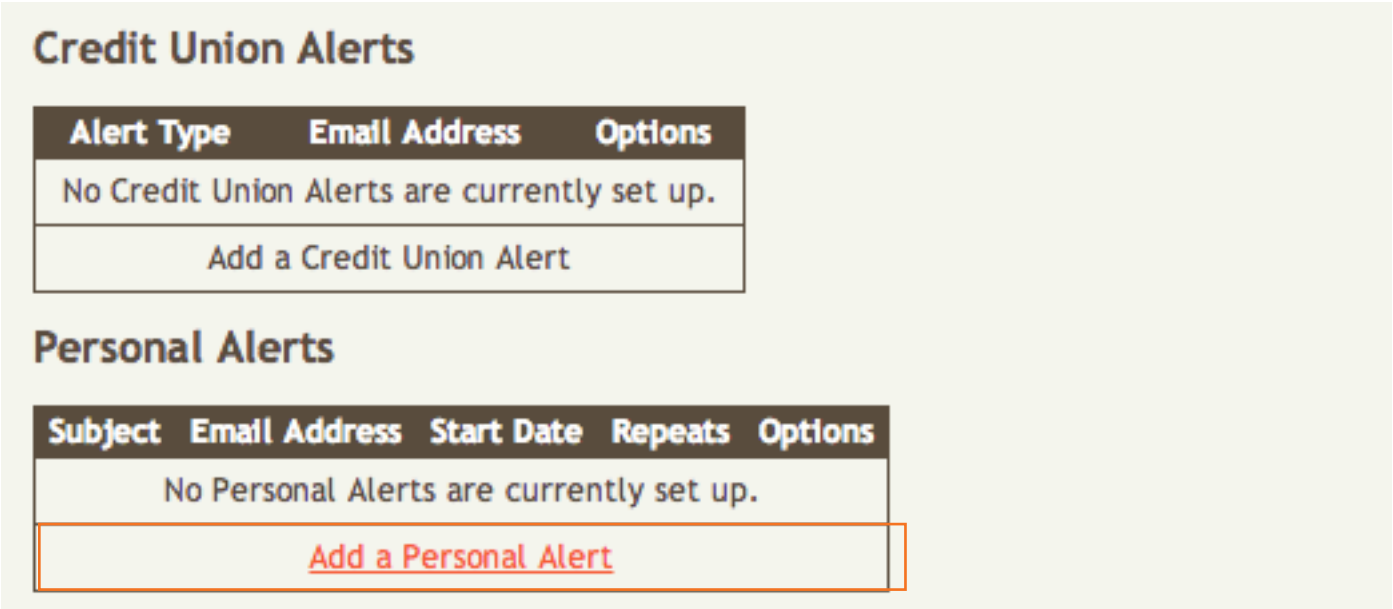


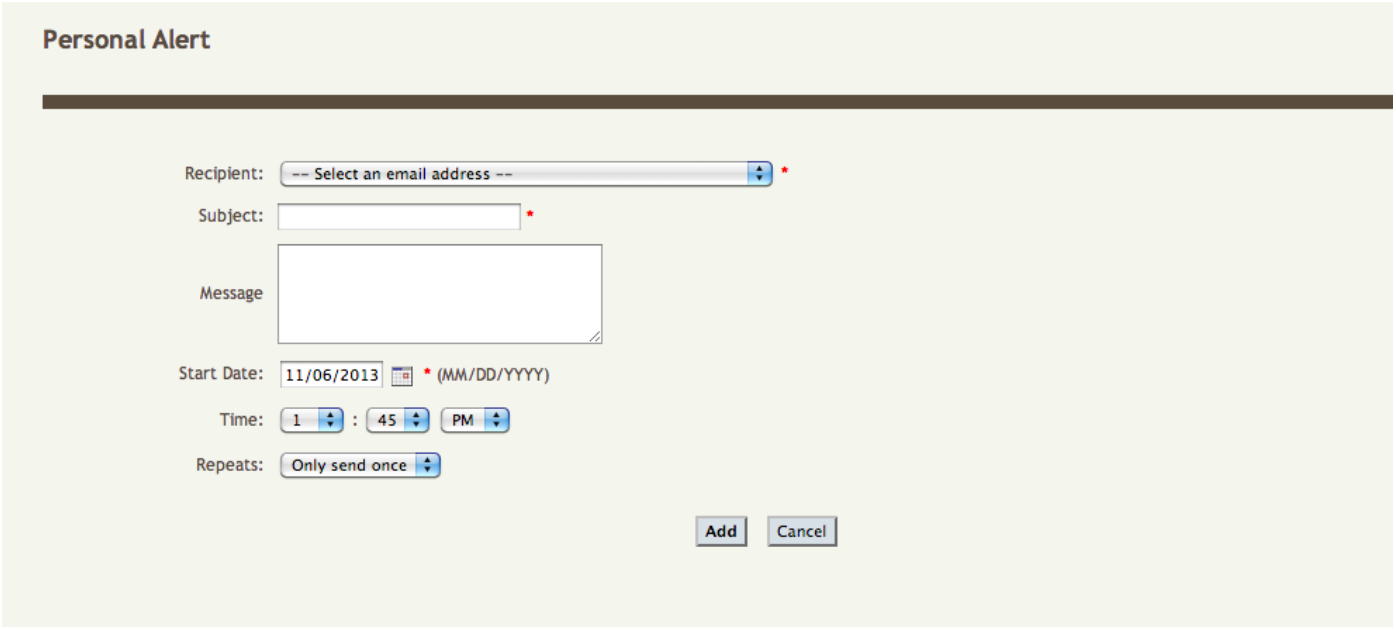
# Setting up a Personal Alert

1. Log on to Online Banking at www.pointwestcu.com.
2. Click on the **mTeller** link at the bottom of the left-hand menu.




3. To add a Personal Alert, click the **Add a Personal Alert** link.



4. FIll out the necessary information, then click the **Add** button to complete the Balance Alert setup.

- **Recipient**: Select the email address or phone number you wish to have the alert sent to.
- **Subject:** Enter a subject for your message.
- **Message:** Enter the message for your personal alert.
- **Date and Time:** Select the date and time (specified in 24-hour cycle) you would like to receive the balance alert.
- **Repeats:** Select whether the alert will be sent only once or repeat daily, weekly, monthly, or annually.