

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

Balances

Bill Pay

Check Re-Ordering

e-Statements

History

LOANS:

Loan & Visa Payment

Loan Payment-Cross Acct.

Loan Advances

Loan App. (New Loan)

Member Options

Messages

Stop Drafts

Tax Info

TRANSFERS:

Transfer Between Suffixes

Transfer - Cross Acct.


Transfers - Automatic

Withdrawals - Check

Mobile Alerts

NCUA

Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government.



Account Summary for ****6790-8


Shares

	Description	Available Balance	Current Balance
10	HGH YLD PASSBOOK	-\$24.00	\$1.00
80	TEST CLUB ACCOUNT	\$2.00	\$2.00
90	BASIC CHECKING	\$2.00	\$2.00
	Total	-\$20.00	\$5.00


Loans

	Description	Rate	Current Balance	Payoff Amount
1575	OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576	OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250	1999 PINTO TEST	4.540	\$0.00	\$0.00
5000	SHARED SECURED	8.490	\$0.00	\$0.00
5350	EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650	COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00
6575	PP PRIME ADJ HEL	0.000	\$0.00	\$0.00
	Total		\$0.00	\$0.00

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



Questions?
Comments?
We want to know what is on your mind.



BEVERLY TESTFILE
Sign Out

Balances

Bill Pay

Check Re-Ordering

e-Statements

History

LOANS:

Loan & Visa Payment

Loan Payment-Cross Acct.

Loan Advances

Loan App. (New Loan)

Member Options

Messages

Stop Drafts

Tax Info

TRANSFERS:

Transfer Between Suffixes

Transfer - Cross Acct.


Transfers - Automatic

Withdrawals - Check

Mobile Alerts

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Options

Account Access Password

Forgotten Password Prompt

Email Address

Login Id

Challenge Questions

Address Change

Associated Logins

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.

Email Address Update

Delete	Email Address	Confirmed	Receive e*statements
<input type="checkbox"/>	<input type="text" value="pointwestcu.com"/>	Send Confirmation Number	<input type="checkbox"/>
<input type="checkbox"/>	<input type="text" value="@gmail.com"/>	Yes	<input checked="" type="checkbox"/>

Update

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

Confirmation number

postmaster@estate.so-sys.com

Sent: Wednesday, November 6, 2013 12:56 PM

To:

In order to confirm your email address you must enter your confirmation number: 781193190

8. 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.

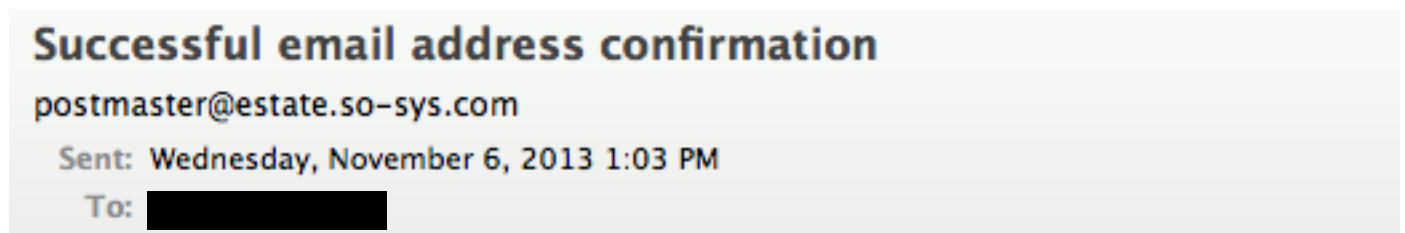
Confirm Email Address

Your confirmation number has been sent.

Email Address: [REDACTED]

Confirmation Number:

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.



Your email address has now been confirmed.

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.

Balances

Bill Pay

Check Re-Ordering

e-Statements

History

LOANS:

Loan & Visa Payment

Loan Payment-Cross Acct.

Loan Advances

Loan App. (New Loan)

Member Options

Messages

Stop Drafts

Tax Info

TRANSFERS:

Transfer Between Suffixes

Transfer - Cross Acct.


Transfers - Automatic

Withdrawals - Check

Mobile Alerts

NCUA

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Account Summary for ****6790-8


Shares

	Description	Available Balance	Current Balance
10	HGH YLD PASSBOOK	-\$24.00	\$1.00
80	TEST CLUB ACCOUNT	\$2.00	\$2.00
90	BASIC CHECKING	\$2.00	\$2.00
	Total	-\$20.00	\$5.00

Loans


	Description	Rate	Current Balance	Payoff Amount
1575	OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576	OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250	1999 PINTO TEST	4.540	\$0.00	\$0.00
5000	SHARED SECURED	8.490	\$0.00	\$0.00
5350	EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650	COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00
6575	PP PRIME ADJ HEL	0.000	\$0.00	\$0.00
	Total		\$0.00	\$0.00

3. Click the Email Address link.



Questions?
Comments?

We want to know what is on your mind.



BEVERLY TESTFILE

Sign Out

Balances

Bill Pay

Check Re-Ordering

e-Statements

History

LOANS:

Loan & Visa Payment

Loan Payment-Cross Acct.

Loan Advances

Loan App. (New Loan)

Member Options

Messages

Stop Drafts

Tax Info

TRANSFERS:

Transfer Between Suffixes

Transfer - Cross Acct.


Transfers - Automatic

Withdrawals - Check

Mobile Alerts

NCUA

Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government.



Options

Account Access Password

Forgotten Password Prompt

Email Address

Login Id

Challenge Questions

Address Change

Associated Logins

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 will be sent the mobile number in question.

The screenshot shows the PointWest Credit Union website interface. On the left is a navigation menu with links like 'Balances', 'Bill Pay', 'Check Re-Ordering', 'e-Statements', 'History', 'LOANS', 'Member Options', 'Messages', 'Stop Drafts', 'Tax Info', 'TRANSFERS', 'Transfer Between Suffixes', 'Transfer - Cross Acct.', 'Transfers - Automatic Withdrawals - Check', and 'Mobile Alerts'. The main content area is titled 'Email Address: Update' and contains a table with the following data:

Delete	Email Address	Confirmed	Receive e-statements
<input type="checkbox"/>	[REDACTED]	Send Confirmation Number	<input type="checkbox"/>
<input type="checkbox"/>	[REDACTED]	Confirm	<input type="checkbox"/>
<input type="checkbox"/>	[REDACTED]	Confirm	<input checked="" type="checkbox"/>

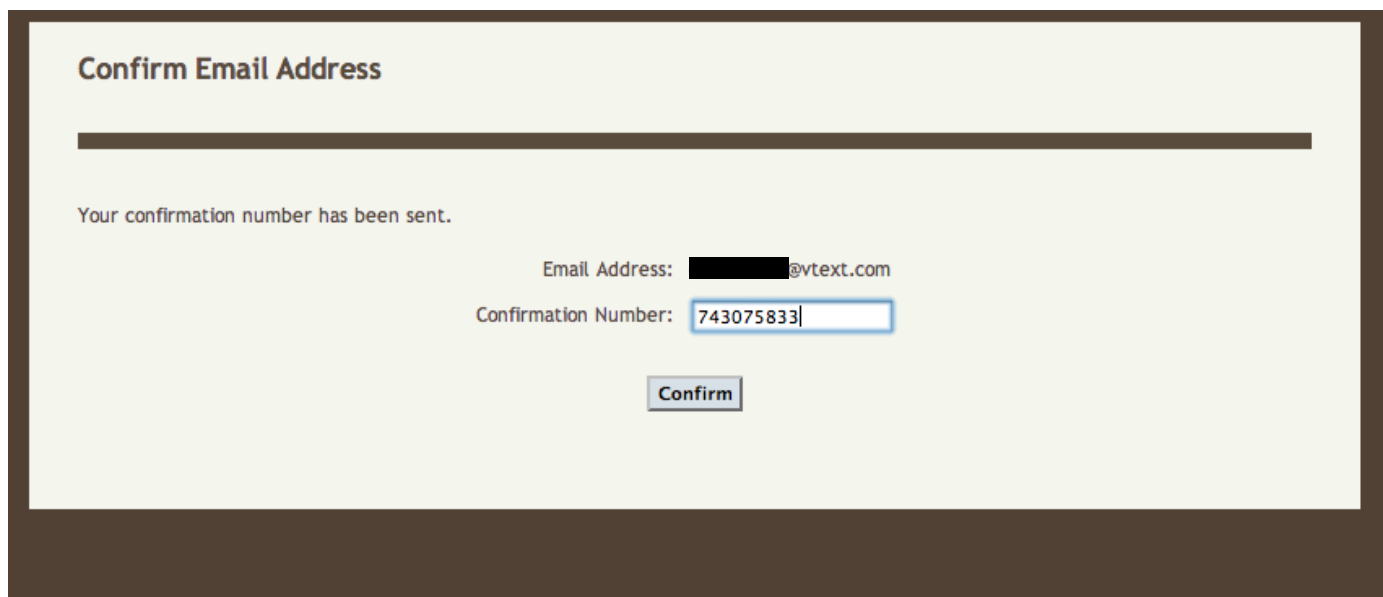
Below the table is an 'Update' button. To the right of the table is a sidebar with a 'BEVERLY TESTFILE Sign Out' link, a 'HERE. THERE. EVERYWHERE.' banner, an 'Options' section with an 'Add a new Email address' link, and a 'Banks. They're as easy as one, two, fee.' advertisement.

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

Today 1:12 PM

(Confirmation number) In order to confirm your email address you must enter your confirmation number: 743075833 [Attachment(s) removed]

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.



Confirm Email Address

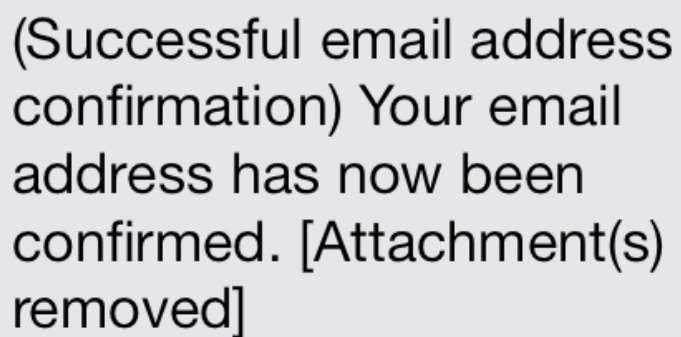
Your confirmation number has been sent.

Email Address: [redacted]@vtext.com

Confirmation Number: 743075833

Confirm

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.



(Successful email address confirmation) Your email address has now been confirmed. [Attachment(s) removed]

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.

Balances
Bill Pay
Check Re-Ordering
e-Statements
History
LOANS:
Loan & Visa Payment
Loan Payment-Cross Acct.
Loan Advances
Loan App. (New Loan)
Member Options
Messages
Stop Drafts
Tax Info
TRANSFERS:
Transfer Between Suffixes
Transfer - Cross Acct.
Transfers - Automatic
Withdrawals - Check
Mobile Alerts

Account Summary for 1996790-8

Shares			
Description	Avail. Balance	Current Balance	
10 HGH YLD PASSBOOK	-\$25.00	\$0.00	
80 TEST CLUB ACCOUNT	\$1.00	\$1.00	
90 BASIC CHECKING	\$2.00	\$2.00	
Total	-\$22.00	\$3.00	

Description	Rate	Current Balance	Payoff Amount
1575 OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576 OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250 1999 PINTO TEST	4.540	\$0.00	\$0.00
5000 SHARED SECURED	8.490	\$0.00	\$0.00
5350 EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650 COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00

Account Status

Shares	\$3.00
Certificates	\$0.00
Loans	\$0.00

Message Center

>< - You have 1 new message.

Last Successful Login

Wed, 6 Nov 2013 10:34 AM

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

Balances
Bill Pay
Check Re-Ordering
e-Statements
History
LOANS:
Loan & Visa Payment
Loan Payment-Cross Acct.
Loan Advances
Loan App. (New Loan)
Member Options
Messages
Stop Drafts
Tax Info
TRANSFERS:
Transfer Between Suffixes
Transfer - Cross Acct.

Alerts Summary

Credit Union Alerts

Alert Type	Email Address	Options
No Credit Union Alerts are currently set up.		
Add a Credit Union Alert		

Personal Alerts

Subject	Email Address	Start Date	Repeats	Options
No Personal Alerts are currently set up.				
Add a Personal Alert				

Balance Alerts

Account	Email Address	Day of Week	Time	Options
No Balance Alerts are currently set up.				
Add a Balance Alert				

Low Balance Alerts

Account	Email Address	Threshold	Options
90 - BASIC CHECKING	pwc718@gmail.com	\$100.00	Edit Remove
Add a Low Balance Alert			

Loan Payment Alerts

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.

Add Balance Alert

Email Address:

*

Suffix:

90 - BASIC CHECKING

Day:

Monday

Time:

8

:

00

AM

Add

Cancel

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.

The screenshot shows the PointWest Credit Union online banking interface. On the left is a navigation menu with various links. The 'Mobile Alerts' link at the bottom of this menu is highlighted with an orange rectangle. The main content area displays the 'Account Summary for 1996790-8', which includes sections for Shares, Loans, and Transfers. On the right side, there is an 'Account Status' section showing balances for Shares, Certificates, and Loans, and a 'Message Center' section indicating a new message and the last successful login time.

Account Summary for 1996790-8

Shares

Description	Avail. Balance	Current Balance
10 HGH YLD PASSBOOK	-\$25.00	\$0.00
80 TEST CLUB ACCOUNT	\$1.00	\$1.00
90 BASIC CHECKING	\$2.00	\$2.00
Total	-\$22.00	\$3.00

Loans

Description	Rate	Current Balance	Payoff Amount
1575 OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576 OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250 1999 PINTO TEST	4.540	\$0.00	\$0.00
5000 SHARED SECURED	8.490	\$0.00	\$0.00
5350 EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650 COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00

Account Status

Shares \$3.00

Certificates \$0.00

Loans \$0.00

Message Center

>< - You have 1 new message.

Last Successful Login

Wed, 6 Nov 2013 10:34 AM

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

The screenshot shows the 'Credit Union Alerts' section of the online banking interface. It contains three sub-sections: 'Credit Union Alerts', 'Personal Alerts', and 'Balance Alerts', each with a table and an 'Add' link. The 'Low Balance Alerts' section is at the bottom and contains a table with one entry for the '90 - BASIC CHECKING' account. The 'Add a Low Balance Alert' link at the bottom of this section is highlighted with an orange rectangle.

Credit Union Alerts

Alert Type	Email Address	Options
No Credit Union Alerts are currently set up.		
Add a Credit Union Alert		

Personal Alerts

Subject	Email Address	Start Date	Repeats	Options
No Personal Alerts are currently set up.				
Add a Personal Alert				

Balance Alerts

Account	Email Address	Day of Week	Time	Options
No Balance Alerts are currently set up.				
Add a Balance Alert				

Low Balance Alerts

Account	Email Address	Threshold	Options
90 - BASIC CHECKING	pwcu718@gmail.com	\$100.00	Edit Remove
Add a Low Balance Alert			

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).

Add Low Balance Alert

Email Address:

-- Select an email address --

Suffix:

10 - HGH YLD PASSBOK

Low Balance Threshold:

Add

Cancel

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.

The screenshot shows the online banking interface for PointWest Credit Union. On the left is a navigation menu with various links. The 'Mobile Alerts' link at the bottom of this menu is highlighted with an orange rectangle. The main content area displays the 'Account Summary for 1996790-8', which includes sections for Shares, Loans, and Transfers. The right-hand side of the interface shows the 'Account Status' and a 'Message Center' with a notification about a new message.

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

This screenshot displays two sections of the online banking interface. The top section, 'Low Balance Alerts', contains a table with one alert set for the '90 - BASIC CHECKING' account with a threshold of \$100.00 and an email address of pwc718@gmail.com. Below the table is a link to 'Add a Low Balance Alert'. The bottom section, 'Loan Payment Alerts', shows a message stating 'No Loan Payment Alerts are currently set up.' and a red link to 'Add a Loan Payment Alert' which is highlighted with an orange rectangle. Below this is another section for 'Transaction Alerts' with a similar message.

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.

Add Loan Payment Alert

Close

Alert For Loan:

*

Recipient:

-- Select an email address --

*

Alert Me Days in Advance:

*

Repeats:

Only send once

Add

Cancel

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.

Balances
Bill Pay
Check Re-Ordering
e-Statements
History
LOANS:
Loan & Visa Payment
Loan Payment-Cross Acct.
Loan Advances
Loan App. (New Loan)
Member Options
Messages
Stop Drafts
Tax Info
TRANSFERS:
Transfer Between Suffixes
Transfer - Cross Acct.
Transfers - Automatic
Withdrawals - Check
Mobile Alerts

Account Summary for 1996790-8

Shares

Description	Avail. Balance	Current Balance
10 HIGH YLD PASSBOK	-\$25.00	\$0.00
80 TEST CLUB ACCOUN	\$1.00	\$1.00
90 BASIC CHECKING	\$2.00	\$2.00
Total	-\$22.00	\$3.00

Loans

Description	Rate	Current Balance	Payoff Amount
1575 OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576 OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250 1999 PINTO TEST	4.540	\$0.00	\$0.00
5000 SHARED SECURED	8.490	\$0.00	\$0.00
5350 EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650 COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00

Account Status

Shares \$3.00

Certificates \$0.00


Loans \$0.00

Message Center

>< - You have 1 new message.

Last Successful Login

Wed, 6 Nov 2013 10:34 AM



Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the U.S.

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

Low Balance Alerts

Account	Email Address	Threshold	Options
90 - BASIC CHECKING	pwc718@gmail.com	\$100.00	Edit Remove

Add a Low Balance Alert

Loan Payment Alerts

Subject	Email Address	Alert In Advance (Days)	Repeats	Options
No Loan Payment Alerts are currently set up.				

Add a Loan Payment Alert

Transaction Alerts

Account	Email Address	Direction	Threshold	Options
No Transaction Alerts are currently set up.				
Add a Transaction Alert				

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).

Add Transaction Alert

Email Address:

Suffix:

Deposit or Withdrawal:

Minimum Transaction Amount:

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.

Account Summary for 1996790-8

Shares

Description	Avail. Balance	Current Balance
10 HGH YLD PASSBOOK	-\$25.00	\$0.00
80 TEST CLUB ACCOUNT	\$1.00	\$1.00
90 BASIC CHECKING	\$2.00	\$2.00
Total	-\$22.00	\$3.00

Loans

Description	Rate	Current Balance	Payoff Amount
1575 OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576 OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250 1999 PINTO TEST	4.540	\$0.00	\$0.00
5000 SHARED SECURED	8.490	\$0.00	\$0.00
5350 EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650 COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00

Account Status

Shares \$3.00
Certificates \$0.00
Loans \$0.00

Message Center

><< - You have 1 new message.
Last Successful Login
Wed, 6 Nov 2013 10:34 AM

NCUA
Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the U.S. government.

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**.

Event Alerts

Alert	Email Address
Successful Login Attempts	-- None --
Unsuccessful Login Attempts	-- None --
Password Change	-- None --
LoginId Change	-- None --
Email Address Change	-- None --
Challenge Answers Change	-- None --

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.

Account Summary for 1996790-8

Shares

Description	Avail. Balance	Current Balance
10 HGH YLD PASSBOOK	-\$25.00	\$0.00
80 TEST CLUB ACCOUNT	\$1.00	\$1.00
90 BASIC CHECKING	\$2.00	\$2.00
Total	-\$22.00	\$3.00

Loans

Description	Rate	Current Balance	Payoff Amount
1575 OVERDRAFT LOC	10.490	\$0.00	\$0.00
1576 OVERDRAFT LOC	10.490	\$0.00	\$0.00
4250 1999 PINTO TEST	4.540	\$0.00	\$0.00
5000 SHARED SECURED	8.490	\$0.00	\$0.00
5350 EMPLOYEE LOC	0.000	\$0.00	\$0.00
5650 COLLATERAL IN PROCESS LIQUIDATION	6.490	\$0.00	\$0.00

Account Status

Shares \$3.00

Certificates \$0.00

Loans \$0.00

Message Center

><< - You have 1 new message.

Last Successful Login

Wed, 6 Nov 2013 10:34 AM

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

Credit Union Alerts

Alert Type	Email Address	Options
No Credit Union Alerts are currently set up.		
Add a Credit Union Alert		

Personal Alerts

Subject	Email Address	Start Date	Repeats	Options
No Personal Alerts are currently set up.				
Add a Personal Alert				

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.

Personal Alert

Recipient:

Subject:

Message:

Start Date: (MM/DD/YYYY)

Time: :

Repeats: