

Setting Up Alerts and Push Notifications in Online/Mobile Banking

Security Alerts:

Security alerts inform you when a security-related event occurs. Some security alerts are required. To view and manage your security alerts, click on Menu/Settings/Alerts. Click on Edit Delivery Preferences to update/choose where you want your notifications delivered (email address, phone number, and/or SMS text number), then click Save. When selecting SMS text number, you will need to agree to the Terms and Conditions. Message and data rates may apply.

In the list of security alerts, required alerts are dimmed and cannot be changed. You can enable or disable optional security alerts. The toggle button has a check mark. The available security alerts vary, depending on your account type.

Managing/Creating Alerts:

Alerts remind you of important events, warn you about the status of your accounts, and notify you when transactions occur. You can use the system's default alerts or create and customize your own. When you create an alert for an account, you specify the conditions that trigger the alert and its delivery method. Alert conditions vary, depending on the alert type.

- Account alerts – Notifies you when the balance in one of your accounts drops below or rises above a specified threshold.
- History alerts – Notifies you when:
 - a debit or credit transaction is greater than, less than, or equal to an amount that you specify.
 - a specified check number posts.
 - a transaction description matches text that you specify.
- Reminders – Notifies you on a specific date or event.
- Transaction alerts – Notifies you when the following transactions are generated (options may vary, depending on your online access):
 - ACH Batch, ACH Collection, ACH PassThru, ACH Payment, ACH Receipt, Payroll, or EFTPS (if enrolled in ACH Origination Service)
 - Change of Address
 - Check Reorder
 - External Transfer
 - Funds Transfer
 - Stop Payment

An alert can trigger when a transaction is drafted, authorized, processed, canceled, or failed.

To create an alert:

1. Click Menu/Settings/Alerts.
2. Click on New Alert and select an alert type.
3. Complete the required steps for the alert type.
4. Click an Alert Delivery Method and provide any required information. Select one of the following delivery methods:
 - a. Email
 - b. Voice (phone call)
 - c. SMS Text Message - If you choose to receive alerts as text messages, you must review the Terms and Conditions and check the box next to Agree To Terms. Message and data rates may apply.

- d. Push Notification (mobile banking app)
 - e. Secure Message Only (in Online Banking)
5. Click on Create Alert.

Enabling and Disabling Alerts:

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

1. Click Menu/Settings/Alerts.
2. Click the type of alert that you want to disable or enable.
3. On the Alerts page, locate the existing alert, then do one of the following in the Enabled column:
 - a. Click Off to disable the alert.
 - b. Click On to enable the alert.
4. When the Save Alert page appears, click Close.

Tip: You can hide Alert details, such as the description and frequency, by clicking on the   show/hide icons.

Editing Alerts:

You can edit an existing alert through the Alerts page. Any changes you make will take effect immediately. To edit an alert:

1. Click Menu/Settings/Alerts.
2. Click Edit for the alert you want to edit. The Edit Account Alert page appears.
3. Make changes to the alert.
4. Click Save.
5. In the success message, click Close.

Deleting Alerts:

You can delete an alert through the Alerts page. Deleting an alert removes it permanently. To delete an alert:

1. Click Menu/Settings/Alerts.
2. Click Edit for the alert you want to delete. The Edit Account Alert page appears.
3. Click Delete.
4. Click Confirm to delete the alert.
5. In the success message, click Close.

Setting up Push Notifications:

Push notifications are pop up messages sent directly to your mobile device, even when you do not have the Community Bank of Santa Maria app open. To enable push notifications:

1. Click Menu/Settings/Push Notifications.
2. On the Push Notifications page, turn on the Enable Notifications toggle to enable push notification.

Note: If you have an iOS device, select Allow on the prompt to allow push notifications.

You can access your alerts by selecting Manage Notifications on the Push Notifications page.

To disable push notifications:

1. Click Menu/Settings/Push Notifications.
2. On the Push Notifications page, turn off the Enable Notifications toggle to disable push notifications.

Note: You can also disable push notifications within your device's settings.