



Creating a Custom Alert Guide

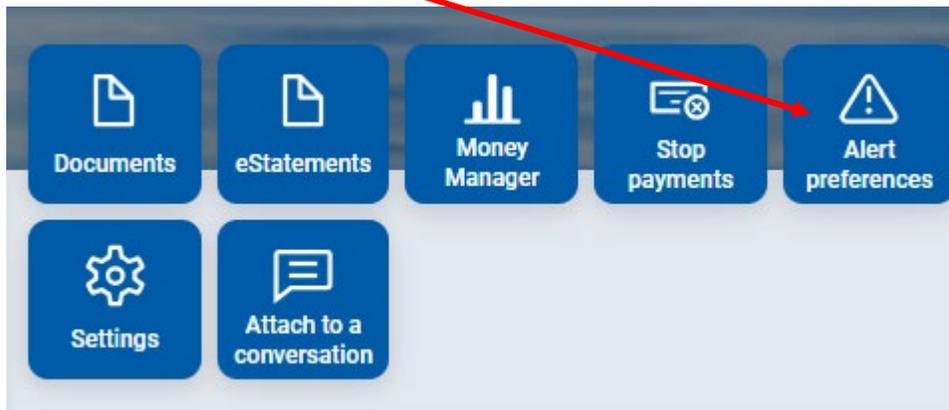
Create Custom Alerts

Add an Alert

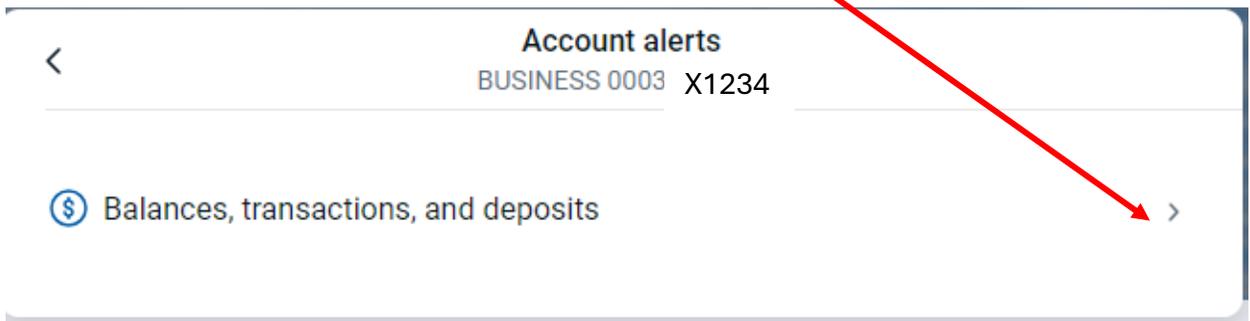
1. From the dashboard, select the account you want to set up an alert for.



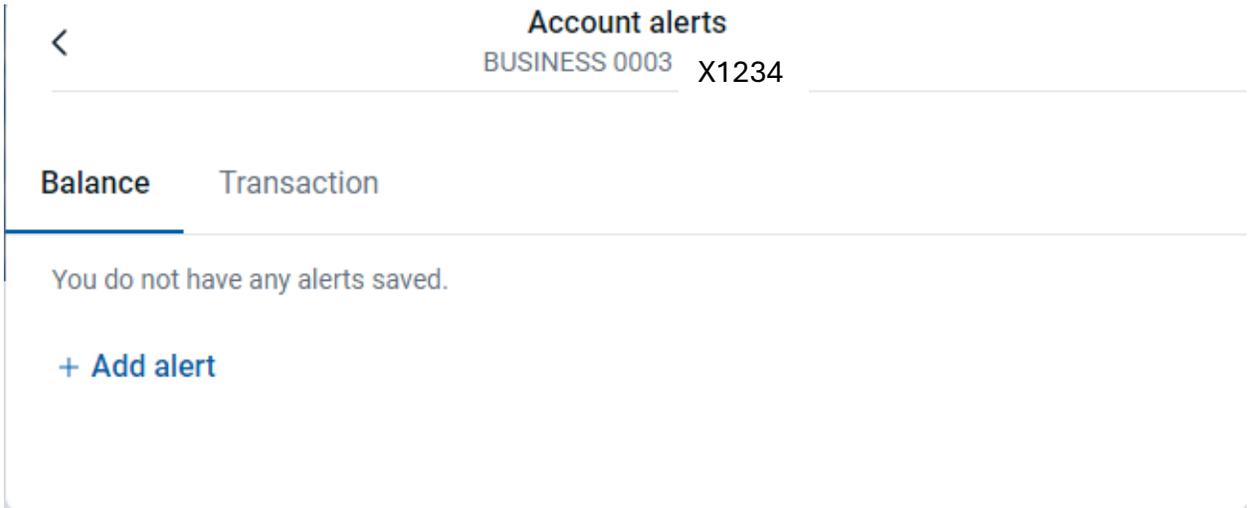
2. Select the Alert preferences button on the right.



Then select the arrow to the right.

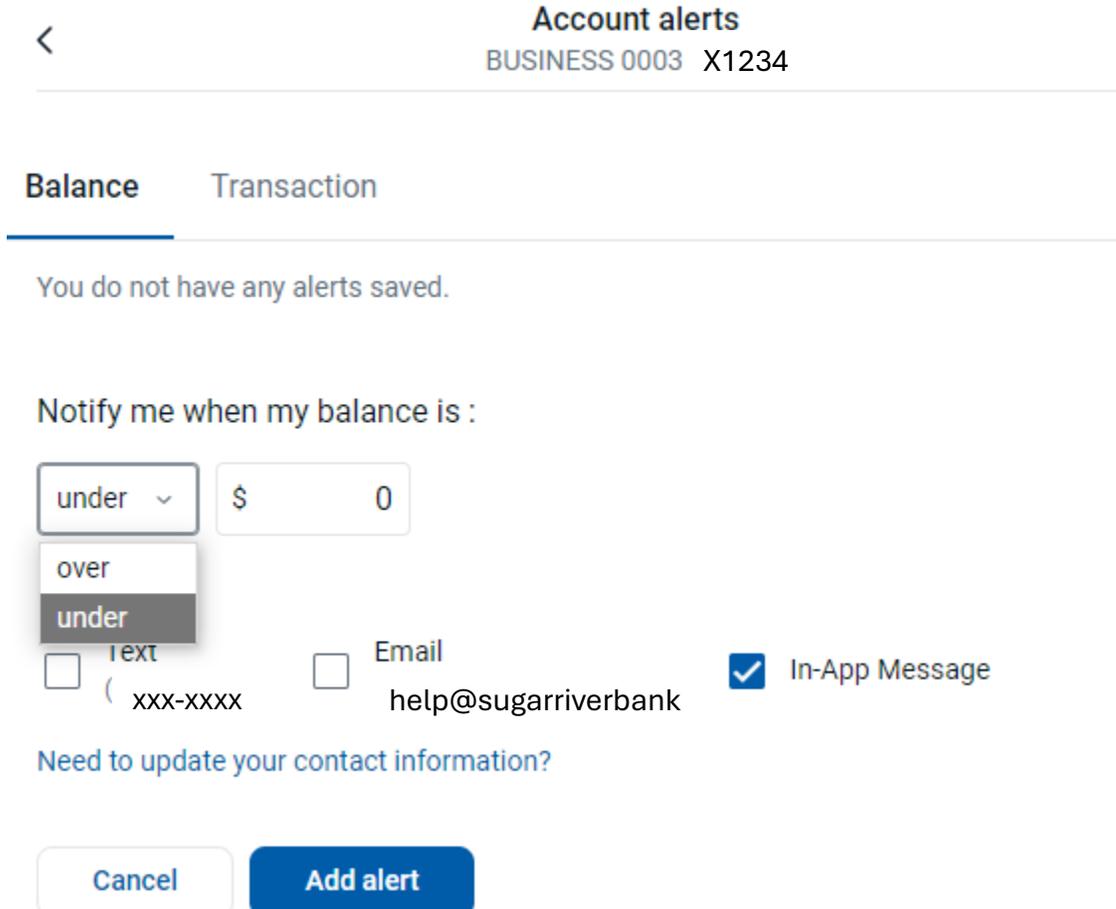


Next, select the type of alert you would like to set up, Balance or Transaction.



Add a Balance Alert

3. Enter the required information, check the method(s) of notifications, and select Add alert.



Add a Transaction Alert

4. Enter the required information, check the method(s) of notifications, and select Add alert.

Account alerts
BUSINESS 0003 X1234

Balance **Transaction**

You do not have any alerts saved.

Notify me when a

Credit (deposit or earning) ▾

Credit (deposit or earning)

Debit (withdrawal or fee)

\$

Notify by:

Text Email In-App Message

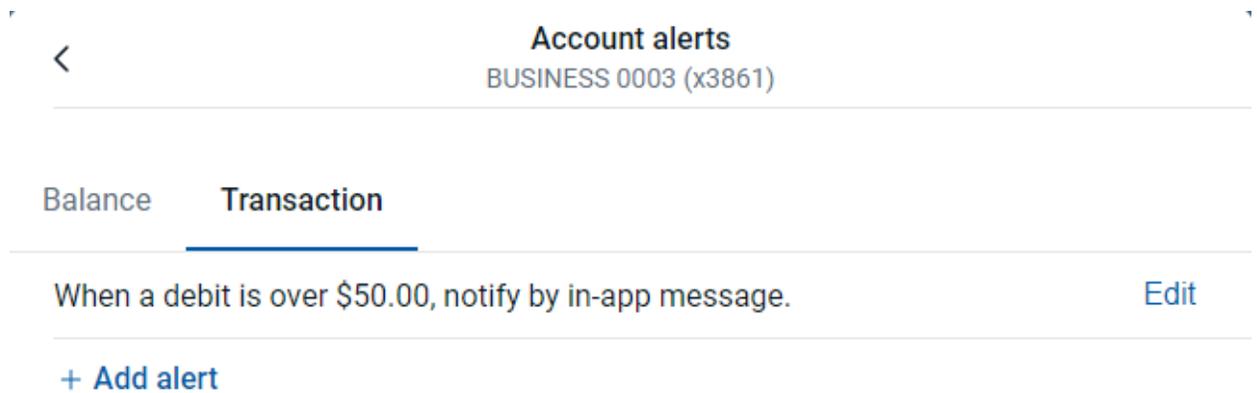
 xxx-xxxxxx test@srb.com

[Need to update your contact information?](#)

Cancel Add alert

Edit an Alert

1. From the dashboard, select the account associated with the alert you want to edit.
2. Select the Alert preferences button on the right. Select the alert you want and then select Edit on the right-hand side.



3. You can delete the alert or edit and save.

