

# Credit Card - Alert and Spend Controls

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## Overview

Clients have the capability in the credit card portal to set their own alerts and controls for the cards linked to their profile, whether that is personal or business. This feature can be found within the existing Features tile. Alerts and Controls allows a cardholder to manage their account and/or card level activity by receiving email and/or SMS notifications. Alerts and Controls do carry over from one card to another so if or when a client gets a new card, the new card will have the same alerts and controls set.

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## SMS Phone Number

The SMS text alert phone number is:

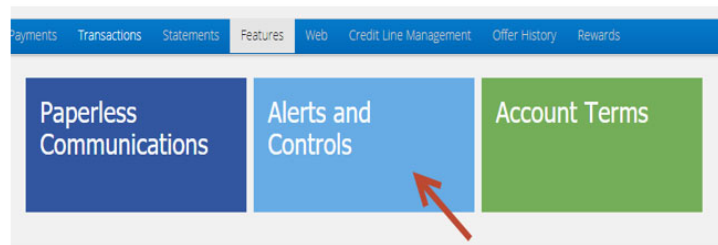
844-719-6124 or 844-717-8025

**Note: Clients cannot use foreign phone numbers when setting up alerts and controls.**

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## Where to Locate

- Login to the Credit Card Portal:
- Click on the Features tab.
- Click on Alerts and Controls tile.



## Terms and Conditions

### Terms and Conditions

The following Terms and Conditions govern the Alerts and Controls Feature.

The Alerts and Controls you set up may result in notifications to the contact information you have provided. All notifications are subject to the terms and conditions of your internet service provider or mobile carrier. We cannot guarantee the timing or delivery of any Alerts or Controls you set up, as they may be impacted by forces that are outside of our control, including the accuracy of the email and mobile phone information you provide us. We are not responsible for any impacts related to any notifications that are delayed or not received.

Notifications will be sent, when appropriate, regardless if the transaction in question is approved or declined. If an action triggers more than one alert, it is possible that multiple notifications will be sent.

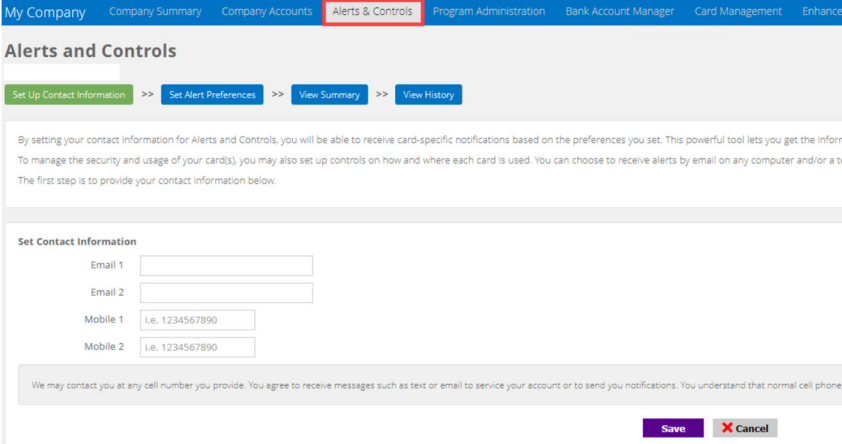
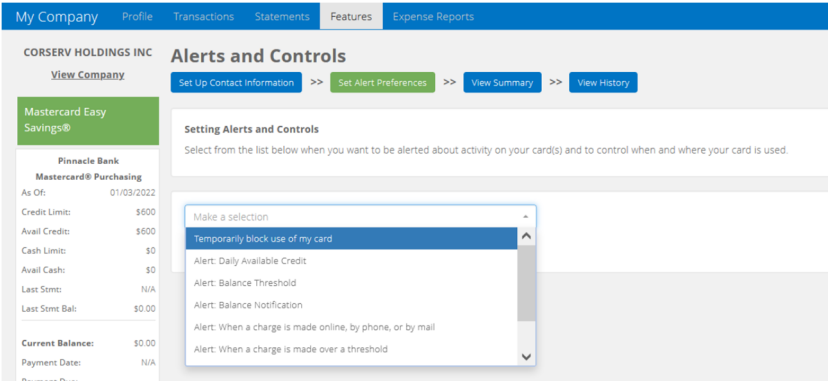
We may terminate the alerting service at any time. To manage Alerts and Controls, you can log in online or Contact Customer Service. By selecting "Continue," you agree to receive notifications via email(s) as well as text messages to your mobile phone(s) using our automated system.

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# Credit Card - Alert and Spend Controls, Continued

## Procedures

Step	Action
1	<p><b>Set Up Contact Information</b> – establish email address(s) and/or mobile number(s) for the Program Administrators. Remember to click the <b>“Save”</b> button.</p>  <p>The screenshot shows the 'Alerts and Controls' page with the 'Set Up Contact Information' form. The form has the following fields: Email 1, Email 2, Mobile 1 (with a hint 'i.e. 1234567890'), and Mobile 2 (with a hint 'i.e. 1234567890'). At the bottom right, there are 'Save' and 'Cancel' buttons. The breadcrumb trail includes 'Alerts &amp; Controls'.</p>
2	<p><b>Set Alert Preferences</b> - Select the Control(s) and/or Alert(s) from the dropdown menu to apply to card(s).</p>  <p>The screenshot shows the 'Setting Alerts and Controls' section. A dropdown menu is open, displaying the following options: 'Make a selection', 'Temporarily block use of my card', 'Alert: Daily Available Credit', 'Alert: Balance Threshold', 'Alert: Balance Notification', and 'Alert: When a charge is made over a threshold'. The breadcrumb trail includes 'Set Alert Preferences'.</p>
3	<p>Click on the <b>Select card for which control applies</b> dropdown and select a cardholder account or All Cards to apply this control or alert. Next, check an email address and/or mobile number to activate the control. Remember to click the <b>“Save”</b> button.</p>

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# Credit Card - Alert and Spend Controls, Continued

## View Summary

**View Summary** tab displays all alerts set on the account.

**Alerts and Controls**

[Set Up Contact Information](#) >> 
 [Set Alert Preferences](#) >> 
 [View Summary](#) >> 
 [View History](#)

**Summary of Alerts and Controls**  
 Below are the alerts and controls that have been set for this account.

Transaction-based Notification	Select card for which control applies		Email 1	Email 2	Mobile 1	Mobile 2
When a charge is made online, by phone or by mail	VERIZON WIRELESS Ending in 0532	m	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
When a charge is made that is at least 20	VERIZON WIRELESS Ending in 0532		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When a charge is made outside of the 50 United States	MICHAEL KAWAUAUGH Ending in 4314		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When a charge is made outside of the 50 United States	VERIZON WIRELESS Ending in 0532		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When my credit card is declined	MICHAEL KAWAUAUGH Ending in 4314		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
When my credit card is declined	CHARLES HAYWARD Ending in 9291		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When my credit card is declined	VAN MORRISON Ending in 3814		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
When my credit card is declined	VERIZON WIRELESS Ending in 0532		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Control how and where my card(s) can be used	Select card for which control applies	m	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	not used
Limit the amount that can be spent per day to 100	MELISSA MARTIN Ending in 0516		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## View History

**View History** tab displays dates and times when notifications were sent and enrollment/de-enrollment of alerts.