

Getting Started: Set Up Alerts, Notifications & Card Management



Account Alerts Setup

1 Log In to Your Account

- Navigate to the Login Page: [Vermont Federal Credit Union](#)
- Log in to your account, click on **Tools**, and select **Alerts & Notifications**

A screenshot of the Vermont Federal Credit Union online banking dashboard. The page header includes the logo and navigation links: Dashboard, Accounts, Transfer & Pay, Tools, Quick Apply, Financial Planning, and Help & Support. A 'Tools' dropdown menu is open, showing 'Check Services', 'Alerts & Notifications' (highlighted with a green circle), and 'eStatements & Tax Forms'. The main content area is divided into sections: 'Dashboard' with a 'ReWARD Checking' account card, 'Accounts' with a 'ReWARD Joint' account card, and 'Credit Cards' with a 'Credit Card' card. On the right side, there are sections for 'View Your Credit Score' and 'View External Account'. A cookie consent banner is visible, stating 'The credit score service makes use of cookies in this browser. Please enable cookies in your browser, or log in using another browser.' and 'powered by savvymoney'.

2 Set Up Alerts

- **Turn on Alerts:** Toggle each alert type on or off.
- The **Accounts** Alerts require you to select an account to associate the alert with.
 - You will need to set up alerts separately for each account

The screenshot displays the Vermont Federal Credit Union website's Alerts and Notifications management interface. At the top, the Vermont Federal Credit Union logo is visible on the left, and navigation icons for mail and user profile are on the right. Below the logo, a navigation bar includes links for Dashboard, Accounts, Transfer & Pay, Tools, Quick Apply, Financial Planning, and Help & Support. The main content area is titled "Alerts and Notifications" and features a sidebar with several alert categories: General Alerts (highlighted with a green circle), Accounts, Authentication, Mobile Deposit, Savings Goals, and Transfers. The "Accounts" section is expanded, showing a dropdown menu for "Selected Account" currently set to "ReWARD Checking", with a green arrow pointing to it. Below this, a list of alert types is shown with corresponding toggle switches:

Alert Type	Toggle Status
Automatic Deposit	On
Automatic Withdrawal	On
Balance	On
Balance Summary	On
Check Cleared	On

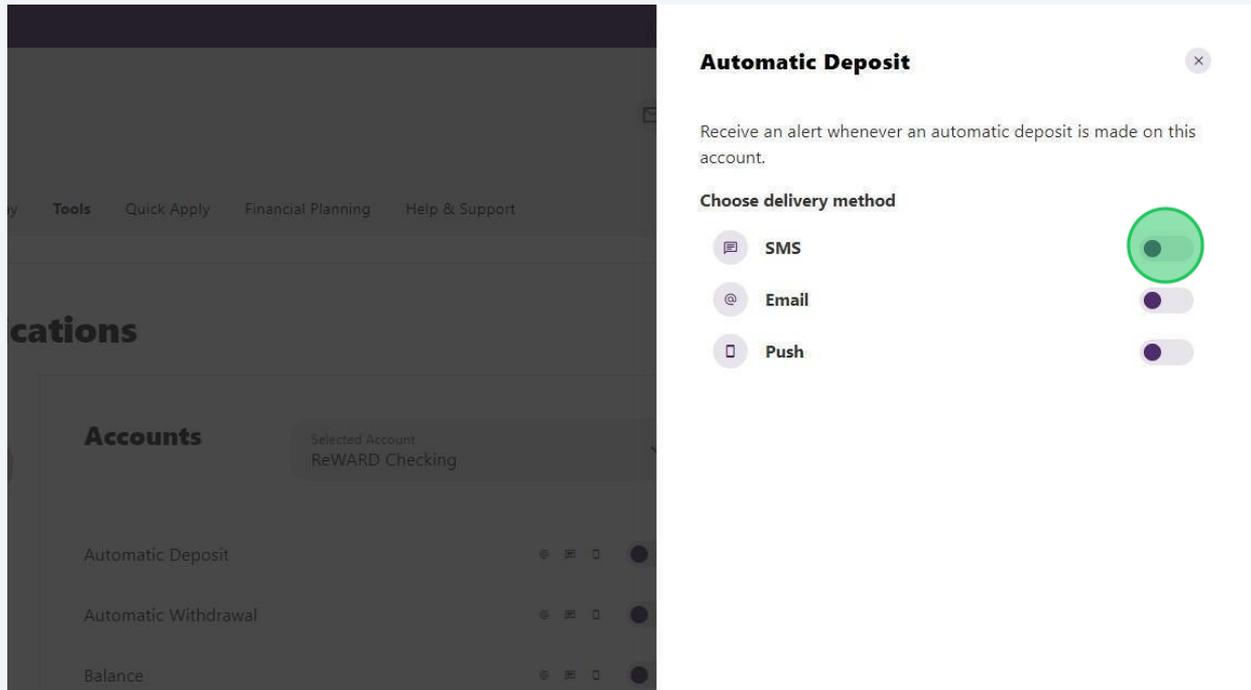
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Select Delivery Method

- **Choose Delivery Options:** Select how you want to receive your alerts: Email, SMS/Text Message or Push Notifications (if using a mobile app)

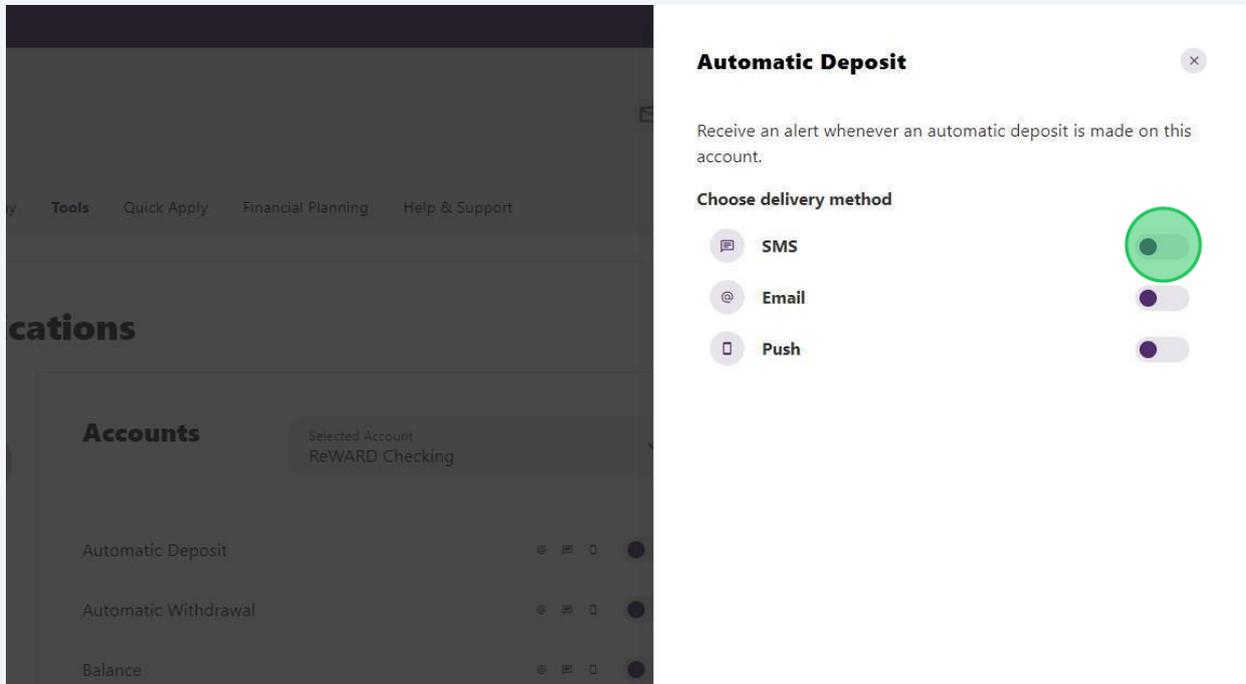
- **Verify Contact Information:**

If you have not already, ensure your email address and phone number are correct on the **Contact** section of the **Settings** page.



4 Confirm and Save Settings

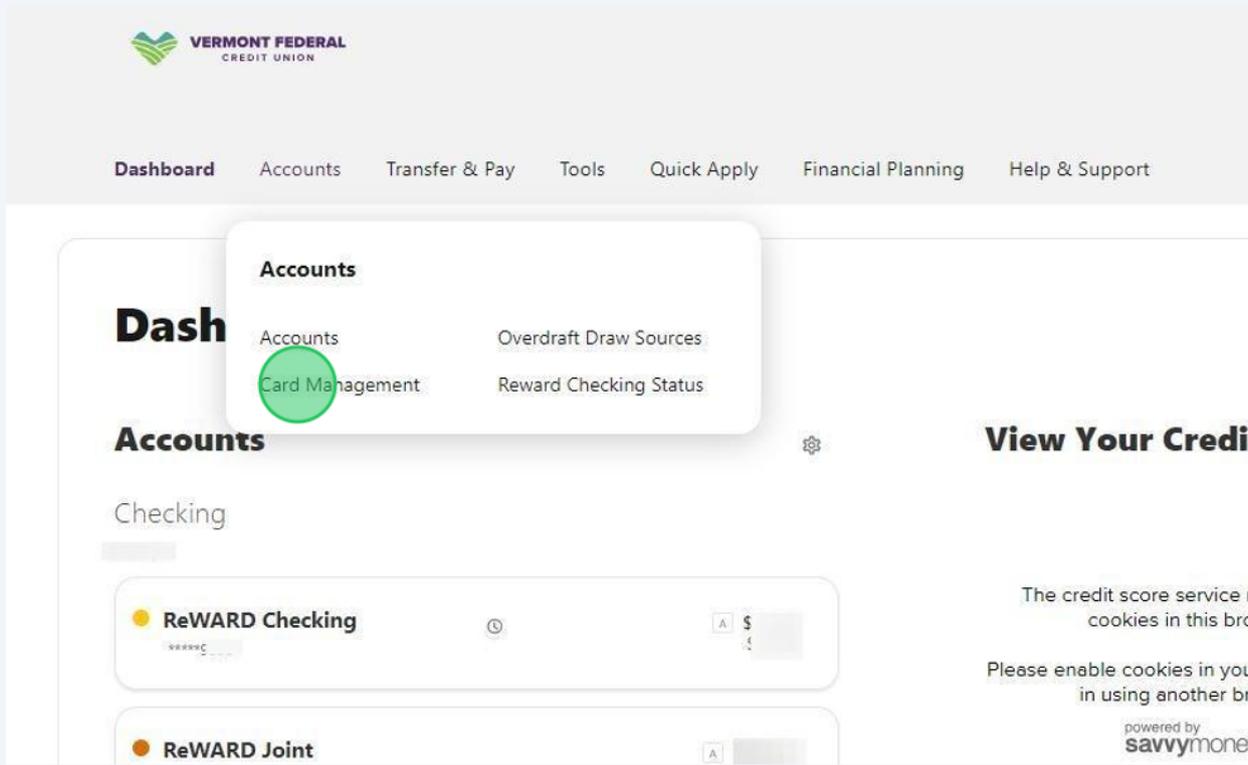
- **Review Your Selections:** Review all alert types, criteria, and delivery methods.
- **Agree to Terms:** (if applicable): Some alerts may require agreeing to terms and conditions. Read and accept if prompted.
- **Save Settings:** Click "**Save**" or "**Confirm**" to activate alerts & Notifications



Credit Card Alert Setup

5 Access Card Management

- Log in to your account, click on **Accounts**, and select **Card Management**



6 Access Card Management

- **Select the Card:** Choose the card you want to set alerts for (e.g., debit card, credit card) and click on "**Manage Card**"
- Click "**Alerts and Controls**" or the "**Gear Icon**"
- Click "**Manage Card Alerts**"

The screenshot shows the Vermont Federal Credit Union website's Card Management section. The navigation bar includes Dashboard, Accounts, Transfer & Pay, Tools, Quick Apply, Financial Planning, and Help & Support. The main content area is titled "Card Management" and displays "Active cards". Three cards are shown: a Visa Credit Card, a Consumer Debit Card, and another Consumer Debit Card. Each card card has a "Manage card" button overlaid on it. Below each card card, there is a card details card showing the card number, description, expiration date, and a "Block this card" toggle switch.

Card Management

Active cards

VERMONT FEDERAL CREDIT UNION

Dashboard Accounts Transfer & Pay Tools Quick Apply Financial Planning Help & Support

VERMONT FEDERAL CREDIT UNION

Manage card

VERMONT FEDERAL CREDIT UNION

VERMONT FEDERAL CREDIT UNION

VERMONT FEDERAL CREDIT UNION

Card Number ... View details

Card Description
Visa Credit Card

Expires 07/2020 CVV ...

Block this card ⓘ

Name [REDACTED]

Card Number ...

Card Description
Consumer Debit Card

Expires 11/2020

Block this card ⓘ

Name [REDACTED]

Card Number ...

Card Description
Consumer Debit Card

Expires 11/2020

Block this card ⓘ

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Choose Alert Types: Select the types of alerts you want to receive, such as:

- **Transaction Limit Alerts:** Notify for transactions above a certain amount.
- **International Transaction Alerts:** Notify you of transactions made outside your country.
- **Transaction Type Alerts:** Set alerts for the types of transactions you want to be notified about.
- **Merchant Type Alerts:** Set alerts for the types of merchants you want to be notified about.

The screenshot displays the Vermont Federal Credit Union website's Card Management section. The page title is "Card Management" and it lists "Active cards". Three cards are shown:

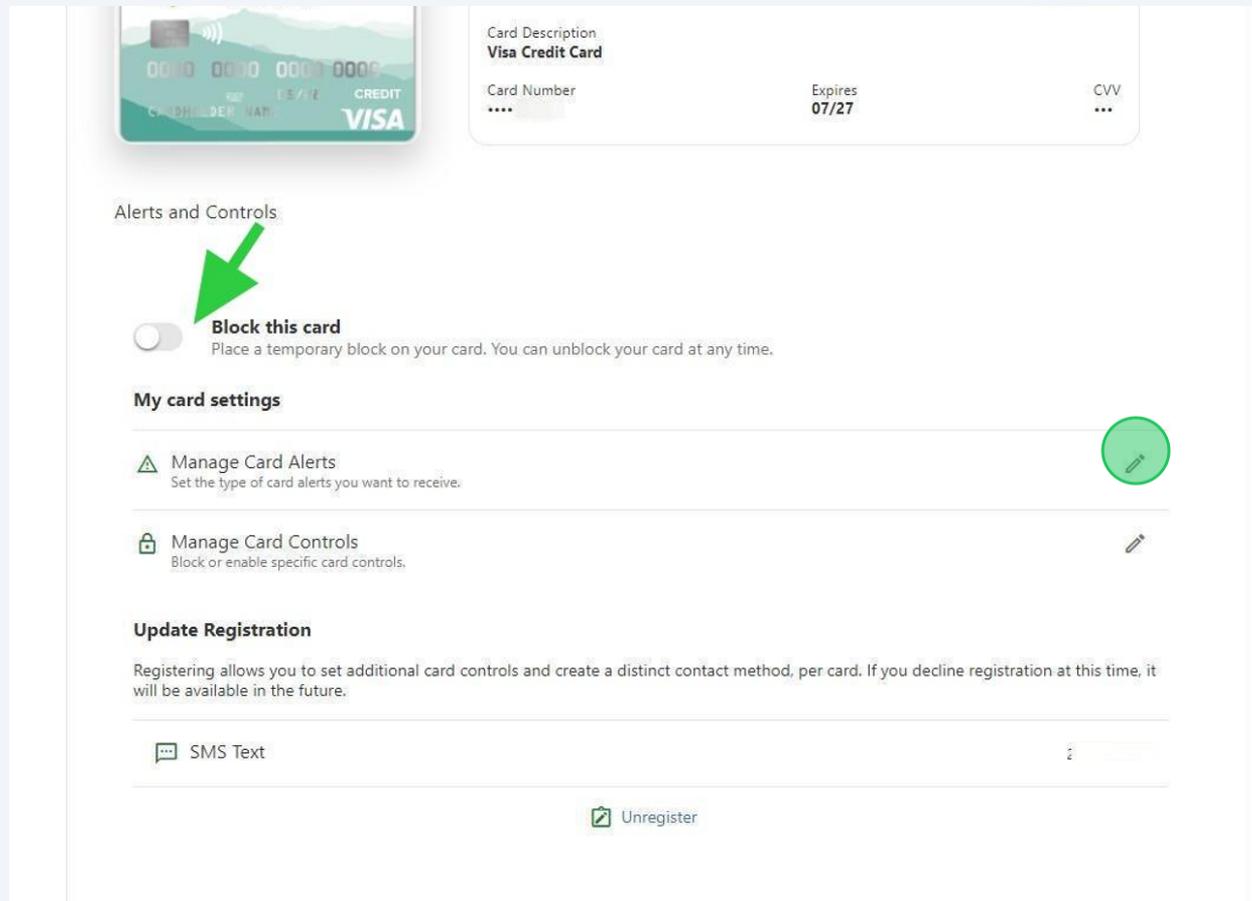
- Card 1:** A Visa Credit Card. Card Number: 0000 0000 0000 0000. Expires: 07/2020. CVV: ...
- Card 2:** A Consumer Debit Card. Card Number: 0000 0000 0000 0000. Expires: 11/2020.
- Card 3:** A Consumer Debit Card. Card Number: 0000 0000 0000 0000. Expires: 11/2020.

Each card card has a "Manage card" button and a "Block this card" toggle switch.

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Step 3: Set Up Card Controls or Manage Card

- Navigate to the "**Alerts and Controls**" section within Card Management.
- **Block/Unblock Card:** Temporarily Block your card to prevent unauthorized use and unblock it when needed.
- **Merchant Category Restrictions:** Block or allow transactions based on merchant categories (e.g., restaurants, online retailers).
- **Review and Save Controls:** Carefully review your settings and **Save**.



The screenshot displays the Card Management interface. At the top left is a Visa Credit Card image. To its right, card details are shown: Card Description (Visa Credit Card), Card Number (masked with four asterisks), Expires (07/27), and CVV (masked with three asterisks). Below this is the "Alerts and Controls" section, where the "Block this card" toggle is turned off. A green arrow points to this toggle. Below the toggle is the text "Place a temporary block on your card. You can unblock your card at any time." The "My card settings" section includes "Manage Card Alerts" (with a green edit icon) and "Manage Card Controls" (with a pencil icon). The "Update Registration" section contains an "SMS Text" option and an "Unregister" button at the bottom.

Card Description
Visa Credit Card

Card Number

Expires
07/27

CVV

Alerts and Controls

Block this card
Place a temporary block on your card. You can unblock your card at any time.

My card settings

 **Manage Card Alerts**
Set the type of card alerts you want to receive. 

 **Manage Card Controls**
Block or enable specific card controls. 

Update Registration

Registering allows you to set additional card controls and create a distinct contact method, per card. If you decline registration at this time, it will be available in the future.

 SMS Text 

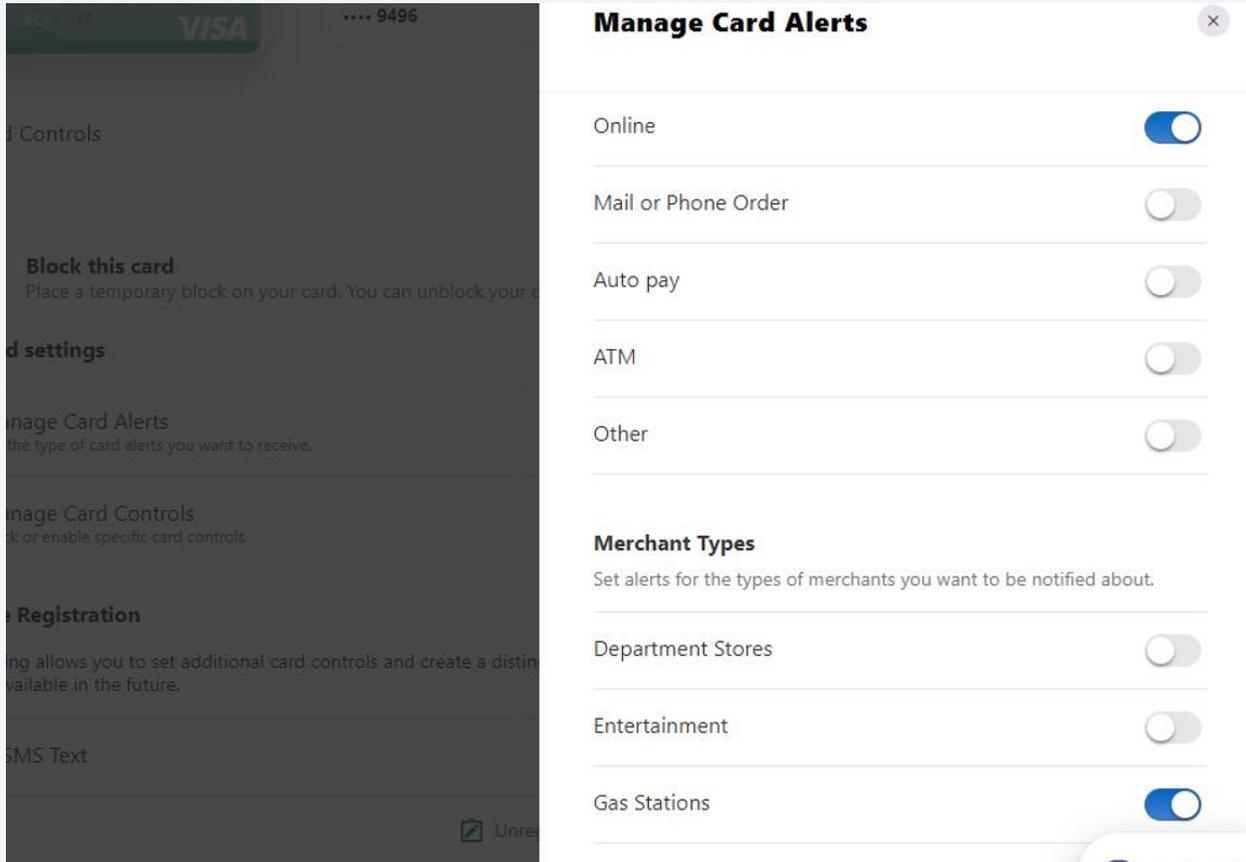
 Unregister

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Step 7: Test Alerts and Controls (Optional):

Make a small transaction or attempt a restricted action to ensure your settings work as expected.

- **Monitor Alerts:** Regularly check your alerts and card activity for any unusual or unauthorized transactions.



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Congratulations! You have successfully set up card management alerts and controls for your Vermont Federal Credit Union card. This setup will help you stay informed about card activity and protect against unauthorized transactions.

Note: You can update or modify your alert preferences and card controls anytime by revisiting the Card Management section. For further assistance, please contact the call center at (888) 252-0202.