

## How Card Alerts Work

**CardWise** users can tailor 'Alert' preferences to their spending patterns and use them to receive notifications of unusual purchases via text, email, or app notifications.

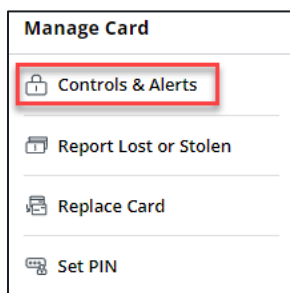
Alert Preferences fall into four categories:

- **Locations:** receive alerts for in-store transactions made outside of a set geographic region and/or for all in-store international transactions.
- **Merchant Type:** receive alerts for purchases made at selected merchant types (i.e., entertainment, gas stations, age restricted – liquor, casinos, bars, etc., and more)
- **Transaction Type:** receive alerts for transactions made in-store, online, at an ATM, autopay/recurring transactions, or other.
- **Spend Limits:** receive alerts for transactions exceeding the set spend limit and/or if cardholders spend over a specific amount per month.

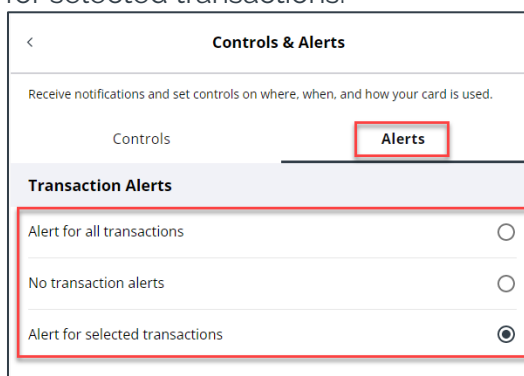
Each time a card is used for a transaction, the transaction is checked against the Alert settings to determine if a notification should be generated.

## How to set up an Alert

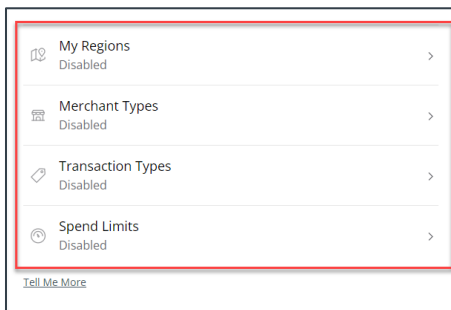
1. Log in to **CardWise Mobile** or **CardWise Online**.
2. Select **Controls & Alerts** from the Manage Card menu.



3. Click **Alerts** and select to receive alerts for all transactions, no transactions, or for selected transactions.



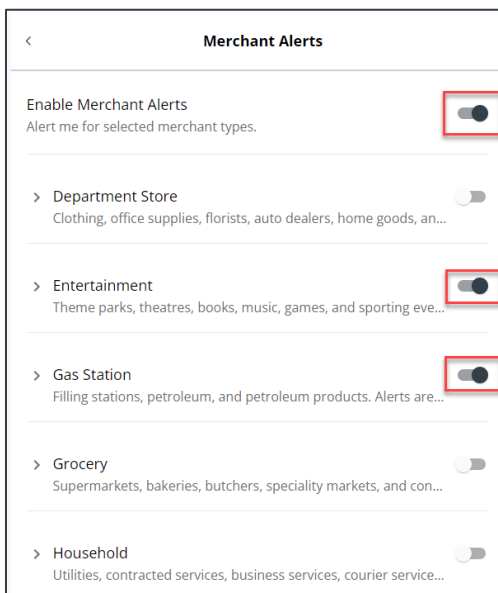
4. For selected transactions, click the applicable category to view and enable transactions related to that category.



5. Click to toggle on the applicable Alert category, and then click the toggle button to enable specific transaction alerts within each category.

In the example below, the Merchant Alerts category has been enabled, and the Entertainment and Gas Station transaction types have been selected. The cardholder will receive an alert for all transactions made at the selected merchant types. Since the Department Store, Grocery, and Household toggles are switched to "off", the cardholder would not receive an alert for transactions made at merchants classified under these categories.

To change the alert, click the toggle button to turn off, and click **Apply**.



\*The CardWise platform supports both Mastercard® and Visa\* credit cards issued by Collabria Financial Services. The above instructions apply to both networks.

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