



Online Business Banking Alerts and Notifications

Creating an Alert

1. From the Drop-Down Menu select Alerts then Alerts.
2. Enter the contact information for each contact point that you would like to receive an alert at and select Update Changes when you are finished.

The screenshot shows the 'Setup Contact Points' form. At the top, there are tabs for 'Alerts', 'Alerts', and 'Delivery Perm'. Below the tabs are buttons for 'Contact Points', 'Setup Alerts', and 'Alert History'. The form includes a 'Time Zone' dropdown set to 'Central Time (US & Canada) (GMT-06:00)'. Under 'Standard Contact Points', there are fields for 'Work Phone', 'Mobile Phone', 'Work E-mail', 'Fax', and 'Wireless Text', each with 'Test' and 'Clear' buttons and a 'Quiet Times' dropdown. At the bottom, there is an 'Additional Contact Points (optional)' section with a 'Select a Contact Point' dropdown and an 'Add' button, followed by an 'Update Changes' button.

3. Select Setup Alerts.

4. Select Add New Alert

5. Click Add in the section you want to add an alert for.

The screenshot shows the 'Alerts Menu' with a dropdown menu set to 'Alerts'. The menu lists several notification types, each with an 'Add' button: 'Account Activity Notification', 'Account Balance Notification', 'ACH Batch Approval Needed', 'Money Transfer Approval Required Notification', and 'Money Transfer Sent Notification'. An arrow points from the 'Account Balance Notification' section to a callout box.

Delivery Permissions

An Administrator will be able to select which users are allowed access to Alerts and which channel they are allowed to receive alerts through.

1. From the Drop-Down Menu select Alerts then Delivery Perm
2. Select Edit.
3. Check the box under the channel for each user.

Delivery Channel Permissions

	Use Default	Email Address	Telephone	Fax Machine	Wireless Device
Default Settings	<input checked="" type="checkbox"/>				
Ann White	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ouag Jones	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joe Smith	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

4. Select Save.

ACH and Money Transfer (Wires) Alerts are sent out as they occur. All activity and balance alerts are sent out before 9:00 am.

When Adding an Account Balance Notification: Only use Closing Ledger (15) or Closing Available (45). Balances are only sent out using the previous days ending balances.