

## About Alerts

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Alerts are messages that inform company users that a specific event has taken place.

Alert messages are displayed in Business Edge for 90 days, after which they are archived for three years. Alerts are not automatically deleted.

Alerts are delivered in Business Edge optionally through e-mail and SMS text (if available). Alerts are always sent to company users in their Business Edge mailbox. Company users can also have alerts delivered to their primary and/or secondary e-mail address and/or mobile telephone number (if applicable).

There are many alerts available to help companies reduce the risk of fraud stay on top of account, transaction, and user activity. The combination of user roles, services, and account entitlements determine the alerts available to company users. Messages are delivered throughout the day depending on the topic and when the information is available. Mandatory alerts notify company users of important events and cannot be turned off. Mandatory alerts appear with a check mark and cannot be deleted.

The *Manage Alerts* page provides a central area for company users to manage their alert subscriptions. It includes the following categories of alerts: Account Alerts, Non-account Alerts, Multiple Accounts, and Custom Alerts.

Account Alerts are divided into the following subcategories:

- Balance and Activity
- Transfer and Payment
- Account Reconciliation & Positive Pay
- Stop Payment
- Statement and Document
- Wire Transfer

Non-account alerts are not sub-categorized. Custom alerts are notifications that company users define and are ideal for setting up reminders for something such as payroll.

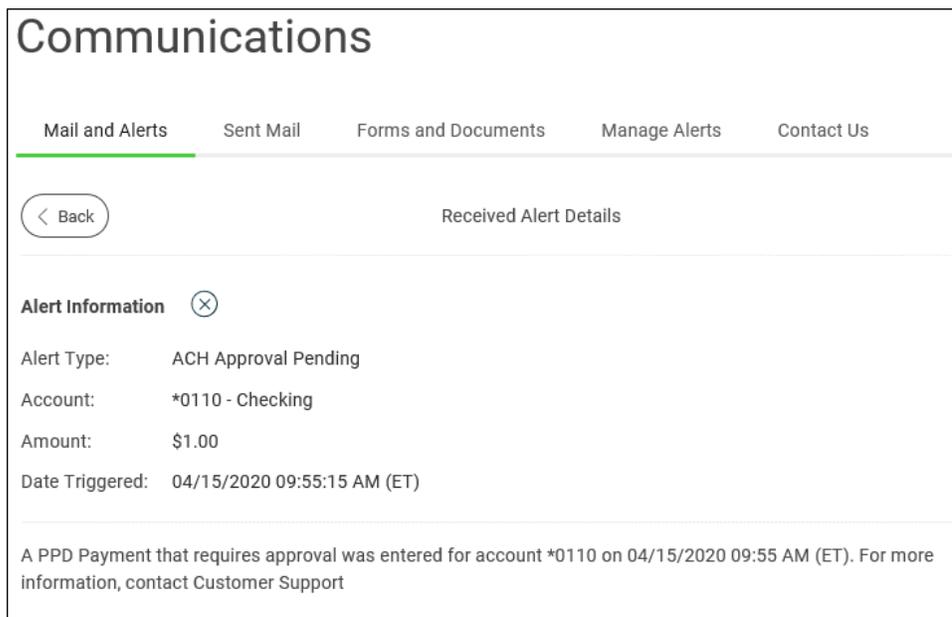
Business Edge offers two alerts services; basic and premium.

## Read Received Alert Messages

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1. Click **Administration > Communications > Mail and Alerts**.
2. Click the link in the **Subject** column for alert you want to view.

### User Profile Activity Alert Page Sample



The screenshot shows a web interface titled "Communications". At the top, there are navigation tabs: "Mail and Alerts" (which is selected and underlined in green), "Sent Mail", "Forms and Documents", "Manage Alerts", and "Contact Us". Below the tabs, there is a "Back" button and the text "Received Alert Details". Underneath, there is a section titled "Alert Information" with a close button (X). The alert details are as follows:

Alert Type:	ACH Approval Pending
Account:	*0110 - Checking
Amount:	\$1.00
Date Triggered:	04/15/2020 09:55:15 AM (ET)

Below the table, there is a message: "A PPD Payment that requires approval was entered for account \*0110 on 04/15/2020 09:55 AM (ET). For more information, contact Customer Support".

## Subscribe to Account Alerts

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1. Click **Administration > Communications > Manage Alerts**.
2. Click the **Account Alerts** tab.
3. Select an **Account**.
4. 
5. If applicable, enter alert criteria.
6. Click the check box beside each **Send To** option to which you want the alert sent. The **Send To** option does not appear if an email or mobile telephone (if applicable) is not defined.
7. Click **Add**.

## Manage Alerts (Account) Page Sample

### Communications

Mail and Alerts   Sent Mail   Forms and Documents   **Manage Alerts**   Contact Us

#### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

Account   Non-Account   Multiple Accounts   Custom

Account  
MINOR SAVINGS - Savings - \*9004

#### Active

##### Transfer and Payment Alerts

Transaction Failed 

Send To:  
julie.user@email.com

##### Statement and Document Alerts

Statement Available 

#### Available

##### Balance and Activity Alerts

###### Check Presented

Notifies you when a check with a specific check number is presented, based on the previous day's transactions.

Alert When:      Send To:

Check Number       Email      julie.user@email.com  
1234

[Add Another](#)

Credit Posted 

## Subscribe to Non-account Alerts

1. Click **Administration > Communications > Manage Alerts**.
2. Click the **Non-Account** tab.
3. 
4. Click the check box beside each **Send To** option to which you want the alert sent. The **Send To** option does not appear if an email or mobile telephone (if applicable) is not defined.
5. Click **Add**.

## Manage Alerts (Non-Account) Page Sample

### Communications

Mail and Alerts   Sent Mail   Forms and Documents   **Manage Alerts**   Contact Us

#### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

Account   **Non-Account**   Multiple Accounts   Custom

#### Active

E-mail Address Changed ✎

Send To:

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#### Available

**ACH File Upload Approval Pending**

Notifies you when an uploaded ach file has approval pending for which you are an approver.

Send To:

Email   julie.user@email.com

**Add**   **Cancel**

ACH File Upload Validation Failure +

## Subscribe to an Alert for Multiple Accounts

1. Click **Administration > Communications > Manage Alerts**.
2. Click the **Multiple Accounts** tab.
3. Select an **Alert Type**. The table row expands, showing the alert description and delivery options.
4. Click the check box beside each **Send To** option to which you want the alert sent. The **Send To** option does not appear if an email or mobile telephone (if applicable) is not defined.
5. Click the **View** drop-down and select the account type you want to see in the **Accounts** drop-down.
6. Click the **Accounts** drop-down and select all accounts or specific accounts and then click **Add**.

## Manage Alerts (Multiple Accounts) Page Sample

### Communications

Mail and Alerts   Sent Mail   Forms and Documents   **Manage Alerts**   Contact Us

#### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

Account   Non-Account   **Multiple Accounts**   Custom

Alert Type  
ACH Positive Pay

**ACH Positive Pay**  
Notifies you when there is an exception item for this account that requires your attention.

Send To:  
 Email   julie.user@email.com

View  
Checking Accounts

Accounts  
REGULAR CHECKING ACCOUNT - Checking - 770110000 - \*8901

**Add**   Cancel

[Disclosure](#) | [Privacy Statement](#)   **Contact Us** +

## Subscribe to Custom Alerts

1. Click **Administration > Communications > Manage Alerts**.
2. Click the **Custom** tab.
3. Click the **Add New Alert** link.
4. Type the **Subject** (up to 120 alphanumeric characters).
5. Type the **Alert Message** text.
6. Select one or more **Send to** options.
7. Select a **Frequency**:

### One time

Sends the alert once on a date in the future.

### Weekly

Sends the alert on the same day each week. The date provided in the **Next Send On** field determines the day on which the alert is sent.

<b>Every other week</b>	Sends the alert on the same day every other week. The date provided in the <b>Next Send On</b> field determines the day on which the alert is sent.
<b>Twice a month - the 15th and last day of the month</b>	Sends the alert on the 15th and last day of the month.
<b>Monthly</b>	Sends the alert on the same date every month. The date provided in the <b>Next Send On</b> field determines the day on which the alert is sent.
<b>Monthly - last day of the month</b>	Sends the alert on the last day of each month.
<b>Every three months</b>	Sends the alert on the same day every three months. The date provided in the <b>Next Send On</b> field determines the day on which the alert is sent.
<b>Every three months - last day of the month</b>	Sends the alert on the last day of the month, every three months.
<b>Every six months</b>	Sends the alert on same day every six months. The date provided in the <b>Next Send On</b> field determines the day on which the alert is sent.
<b>Every six months - last day of the month</b>	Sends the alert on the last day of the month, every six months.
<b>Yearly</b>	Sends the alert on the same date every year. The date provided in the <b>Next Send On</b> field determines the day on which the alert is sent.
<b>Custom</b>	Sends the alert on unique <b>Send On</b> dates. At least one date is required but up to 25 custom dates can be scheduled at one time.

8. If applicable, type or select a **Next Send On** date.
9. If applicable, type or select an **End On** option:
  - Continue indefinitely

- Continue until this date
- Continue for this many occurrences. Specify when you want to stop receiving the alert based on the number of times it is delivered.

10. Click **Add Alert**.

**Manage Alerts Page Sample**

## Communications

Mail and Alerts   Sent Mail   Forms and Documents   **Manage Alerts**   Contact Us

### Manage Alerts

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Account   Non-Account   Multiple Accounts   **Custom**

#### Add Custom Alert

Subject  
Sample

Alert Message  
Sample message text.

Send To  
 Bank mail inbox  
 julie.user@email.com

Frequency  
Custom

Send On  
Date  
09/20/2020

[+ Add Additional Dates](#)