

Setting up Contact Points & Alerts

Users have the ability to set up Contact Points and Alerts in Business Online Banking. Alerts provide notifications of key banking, balance, transaction and administrator/security events, allowing company Users to more effectively manage their account and monitor for potentially fraudulent activity. Alerts provide information through your choice of contact points, such as phone, text and/or email. Instructions for how to set up Contact Points and Alerts in Business Online Banking are outlined below.

Step 1:

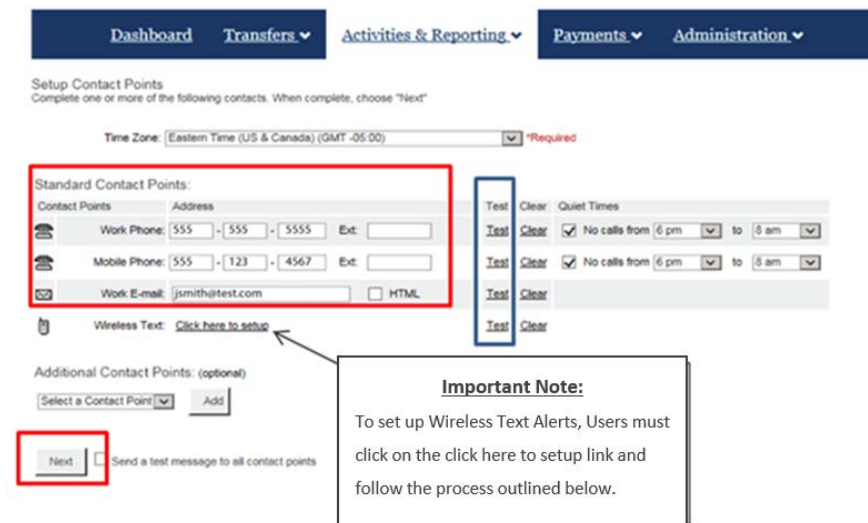
Click the **Activities & Reporting** tab and select **Alerts** from the dropdown menu.



Step 2:

On the **Setup Contact Points** screen, complete the Standard Contact Points section by filling in the Work Phone, Mobile Phone, and/or Work Email fields. You will have the option to select as many Contact Point options as you want.

We recommend that Users test each Contact Point, by clicking the **Test** link, as they're input into the system to ensure they are properly set up. Click **Next** at the bottom of the page to continue.



If the **Wireless Text** option is selected, the **Wireless Text-Phone Address** screen will open. From this screen, select **Wireless Address Finder** and choose a **Carrier** and **Plan** from the drop down menu and click **Next** to continue to the next screen.

Note to Verizon Wireless Customers: To set up Text Alerts, please select “Verizon” from the **Carrier** dropdown menu.

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Contact Points Setup Alerts Alert History

Wireless Text — Phone Address
If you know the email address of your phone, please enter it. If you do not know your phone's email address, please use the address finder to determine the address.

Wireless Text Phone Email Address

Email Address:
(Example: 3125551212@mobile.att.net)

Wireless Address Finder (Step 1)

Carrier: ▼

Plan: ▼

Cancel Next

On the **Wireless Address Finder** screen, enter the mobile phone number into the **Phone** field, and click **Save** to save the phone number information for Text Alerts.

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Contact Points Setup Alerts Alert History

Wireless Address Finder (Step 2)
Please input the address for your wireless device.

Wireless Text Carrier

Carrier: Verizon

Plan: US

Wireless Address (choose one)

Phone: - -

PIN Number:

Back Cancel Save

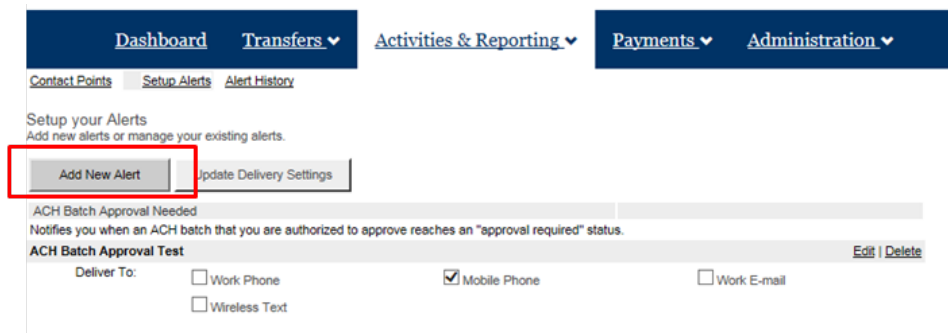
Step 3:

Back on the **Setup Contact Points** screen, click **Setup Alerts**.



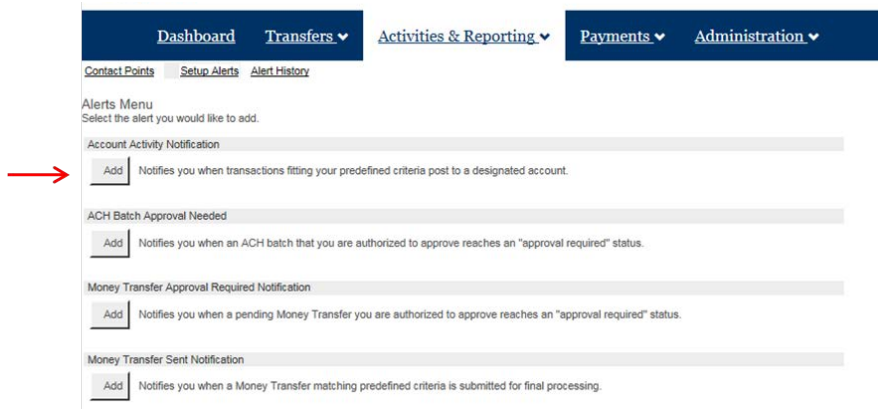
Step 4:

Once on the **Setup your Alerts** screen, click the **Add New Alert** button.



Step 5:

On the **Alerts Menu** screen, click the **Add** button next to the category that you want to set-up the alert for.



We recommend that Wire and ACH customers set up the following Alerts:

- ACH Batch Approval Needed
- Money Transfer Approval Required Notification
- Money Transfer Sent Notification

Step 6:

On the **Add an Account Activity Notification** screen, name the Alert, complete all necessary fields, and click the **Save** button to save the alert.

Dashboard Transfers **Activities & Reporting** Payments Administration

Contact Points Setup Alerts Alert History

Add an Account Activity Notification
Set thresholds and direct alerts to contact points. When finished, choose "Save".

Notifies you when transactions fitting your criteria post to a designated account

Alert Name:

Account Numbers:

012345678 - Savings Account	>>	
987654321 - DDA- Custom Description test PG	<<	

Transactions:

Any Credit Transaction
 Any Debit Transaction
 Any Transaction (Credit or Debit)
 Selected Transactions from list below

All Type Codes Sort by Name

	>>	
	<<	

Threshold:

Immediately Available Funds: Only notify me when a transaction selected above posts to a selected account AND when the transaction includes immediately available funds.

Deliver To: Work Phone Mobile Phone Work E-mail

Save **Cancel**

Once the alert is saved, a confirmation screen will display letting you know that the Alert is set-up.

Dashboard Transfers **Activities & Reporting** Payments Administration

Contact Points Setup Alerts Alert History

Setup your Alerts
Add new alerts or manage your existing alerts.

Add New Alert Update Delivery Settings

Account Activity Notification [Add Another Account Activity Notification](#)

Notifies you when transactions fitting your predefined criteria post to a designated account.

1. Transfer-Credit - Notify me when selected transaction with amount greater than \$500.00 posts to the selected account	Edit Delete
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Deliver To: Work Phone Mobile Phone Work E-mail