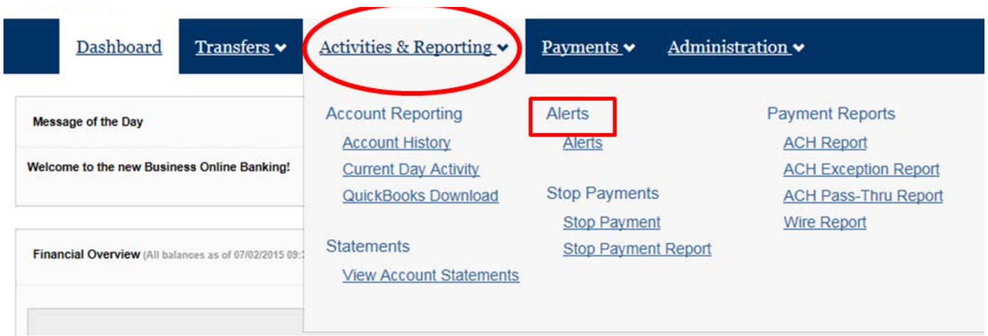
Setting up Contact Points & Alerts

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:

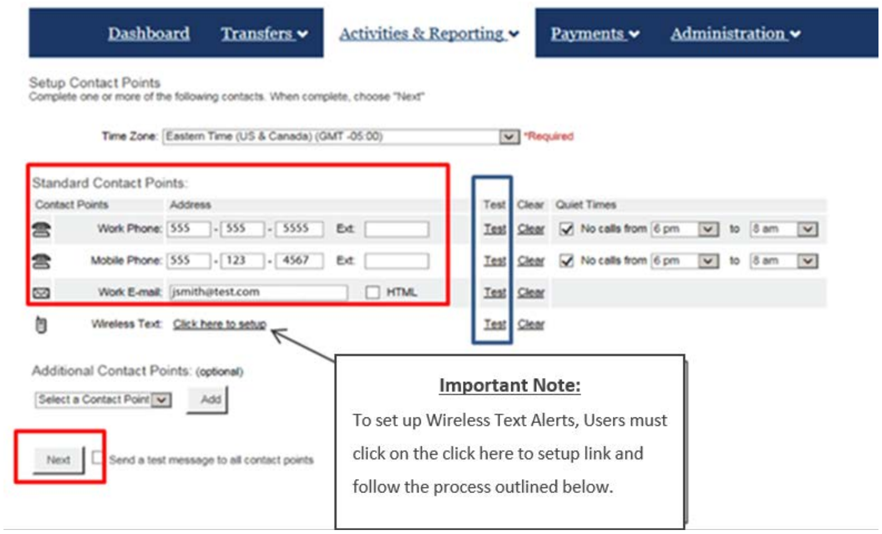
Click the ***Activities & Reporting*** tab and select ***Alerts*** from the dropdown menu.



Step 2:

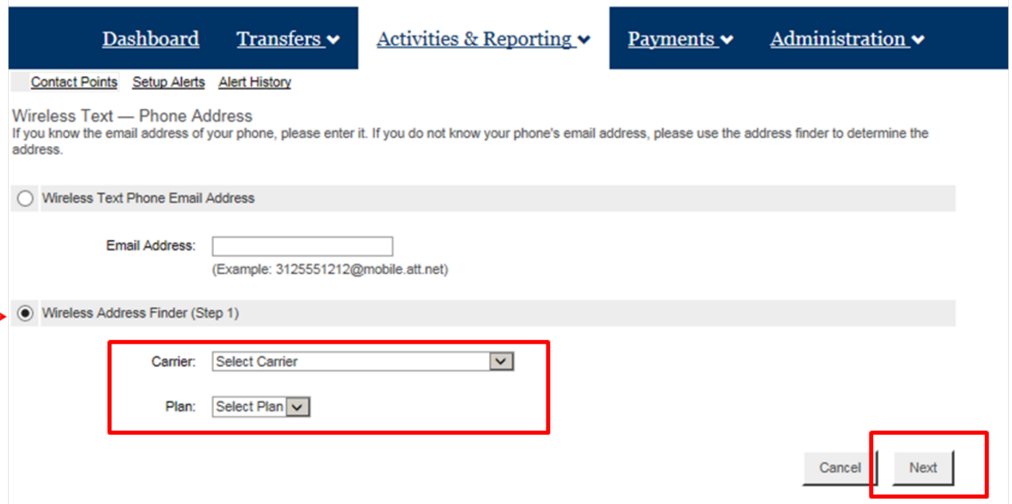
On the ***Setup Contact Points*** screen, complete the Standard Contact Points section by filling in the Work Phone, Mobile Phone, and/or Work Email fields. You will have the option to select as many Contact Point options as you want.

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.

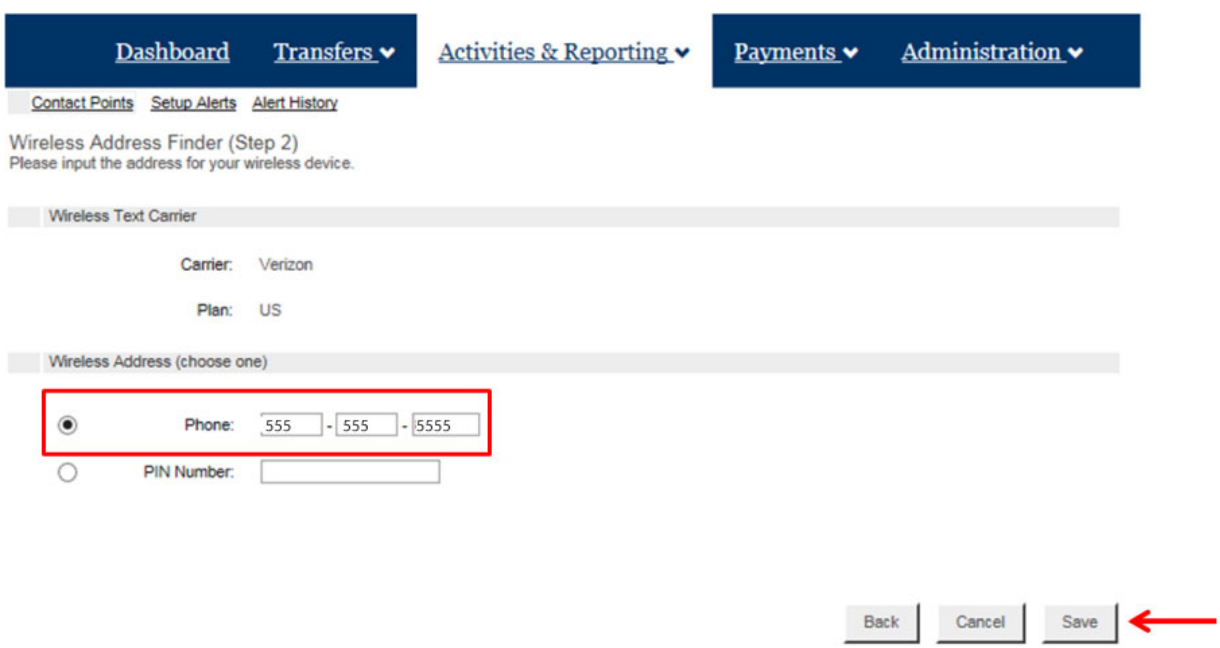


If the **Wireless Text** option is selected, the **Wireless Text-Phone Address screen** will open. From this screen, select ***Wireless Address Finder*** and choose a **Carrier** and **Plan** from the drop down menu and click ***Next*** to continue to the next screen.

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



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.

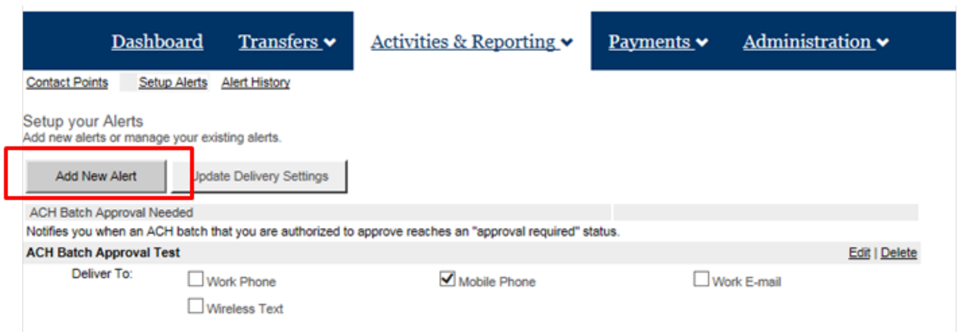


Step 3:

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

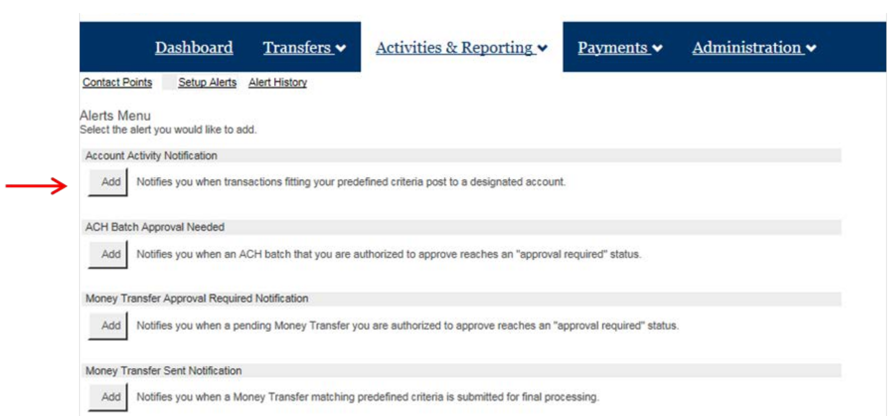
Step 4:

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.

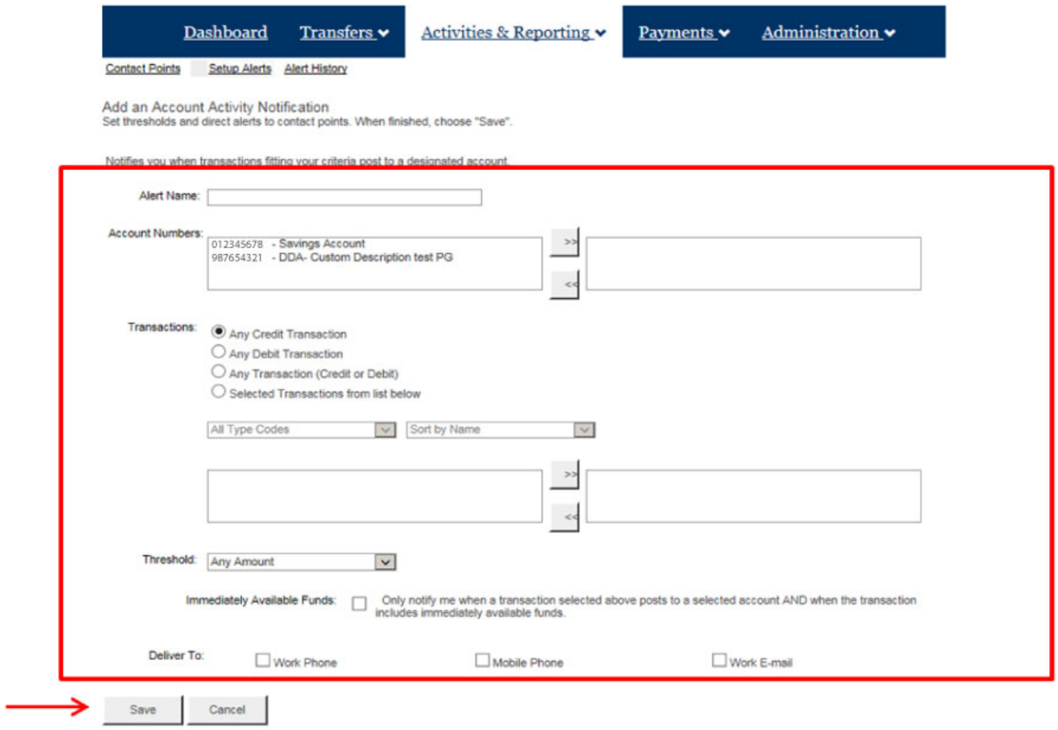


We recommend that Wire and ACH customers set up the following Alerts:

- 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.



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