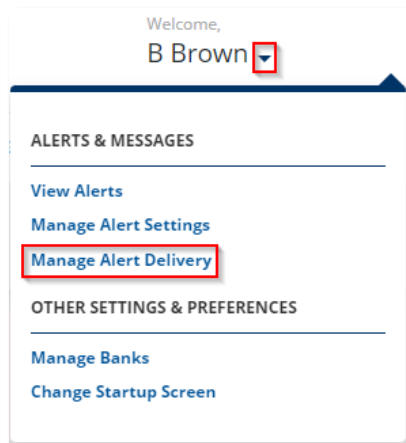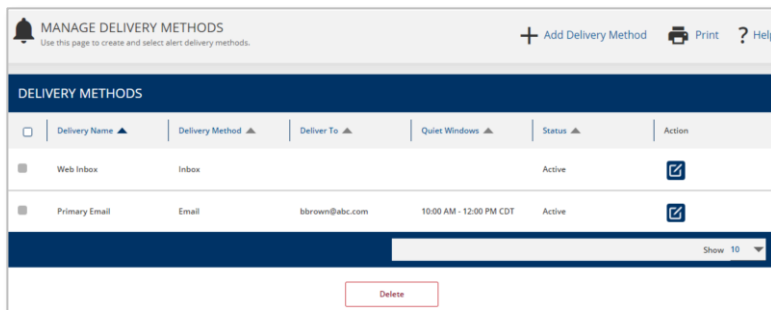## MANAGING ALERTS

Treasury Internet Banking's Alert options allow you to receive customized notifications regarding account activity. This guide will review how to manage your alert delivery settings, how to create alerts, and how to review alert messages in your Treasury Internet Banking Inbox. These options enable you to monitor specific account activity with customized notifications.

NAVIGATING TO ALERTS & MESSAGES

STEP 1: MANAGING ALERT DELIVERY

1. Click the arrow beside your name to view the *Alerts & Messages* menu.

2. Select the *Manage Alert Delivery* option to set up delivery options for receiving alerts.

MANAGE ALERT DELIVERY

STEP 2: VIEW DELIVERY METHODS

1. On the **Manage Delivery Methods** screen, existing *Delivery Methods* are displayed.

The *Web Inbox* is your online inbox within Treasury Internet Banking. All alerts are stored in your Inbox until you delete them.

The *Primary Email* address is created when your User ID is created. You may edit the default Primary Email address or use the Add Delivery Method option to create another email address.

2. Click the *Edit* icon in the *Action* column, to change the *Delivery Name* or change the *Status* of a delivery method to Inactive or back to Active. You can rename the Web Inbox but you cannot make it Inactive.

ADD DELIVERY METHOD

STEP 3: ADD DELIVERY METHODS

1. To create an additional delivery channel, click the *+Add Delivery Method* icon on the top right corner.

2. Enter the *Delivery Name* to identify the delivery method and an email address in the *Deliver To* field.

The optional *Quiet Window* feature allows you to set a timeframe in which you do not wish to receive alerts.

3. Click *Done* once all the required information has been entered.

4. A *Successful Submit* message is displayed to confirm submission.
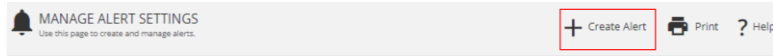
MANAGE ALERT SETTINGS

STEP 4: MANAGING ALERT SETTINGS

To create or view existing alerts, navigate to *Manage Alert Settings* under the *Alerts & Messages* menu.

There are two types of alerts:
1. **My Alerts** are user-defined alerts and can be customized or deleted as required.
2. **Bank Security Alerts** are bank-defined and are linked to any changes made to your company's Treasury Internet Banking profile such as user entitlements, templates, etc. As a security measure these alerts cannot be deleted.
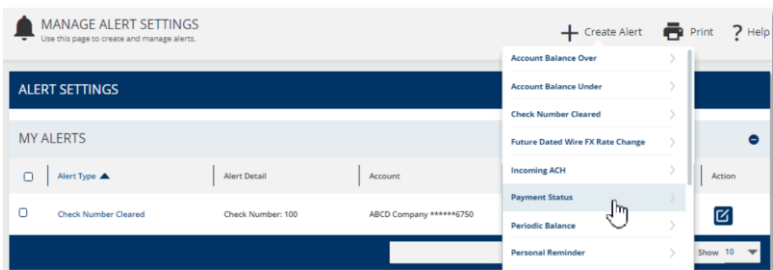
CREATE AN ALERT

STEP 4: NAVIGATION

1. To create a new alert, click the +*Create Alert* option on the top right corner.

The system offers multiple alert options. For example, you can add an alert that notifies you when a balance is over or under a specific amount or when a payment is pending approval.

2. Select an *Alert* from the drop down list.

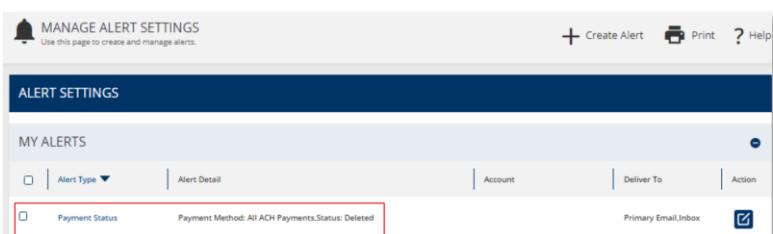3. The alert criteria fields vary on the *Create Alert* overlay, depending on the alert type selected.

4. Enter the *alert criteria* and select the desired delivery method.
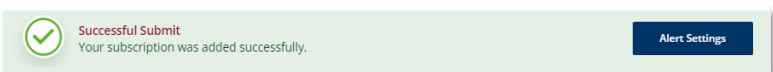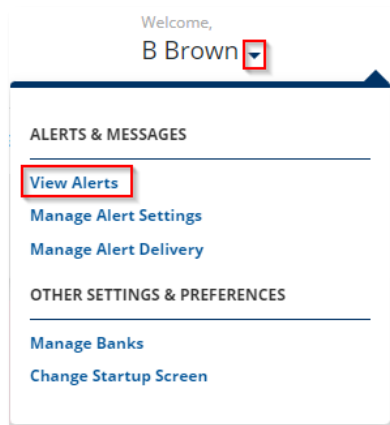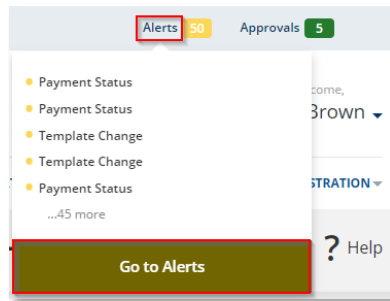

5. Click *Submit* to save the alert.

6. A Successful Submit message is displayed to confirm the alert creation.

The alert is now displayed in the *My Alerts* section of the *Manage Alert Settings* screen.

VIEW ALERTS

There is more than one way to access your Alert messages.

The easiest method is through the *Alerts* notification section at the top of the screen.

Another option is through the *View Alerts* option within the *Alerts & Messages* menu.

The *View Alerts* screen displays received alerts. Unread alert messages are indicated with a bullet point and bold font.

For best practice, Administrators should view their alerts frequently to review security alerts and monitor changes made to their online banking settings.

1. Click the *Subject* line to view message details.

2. Click *Done* to close the message but retain it in the inbox.

3. Click *Delete* to remove the alert from your inbox. Alert messages are saved in your Inbox until you delete them.