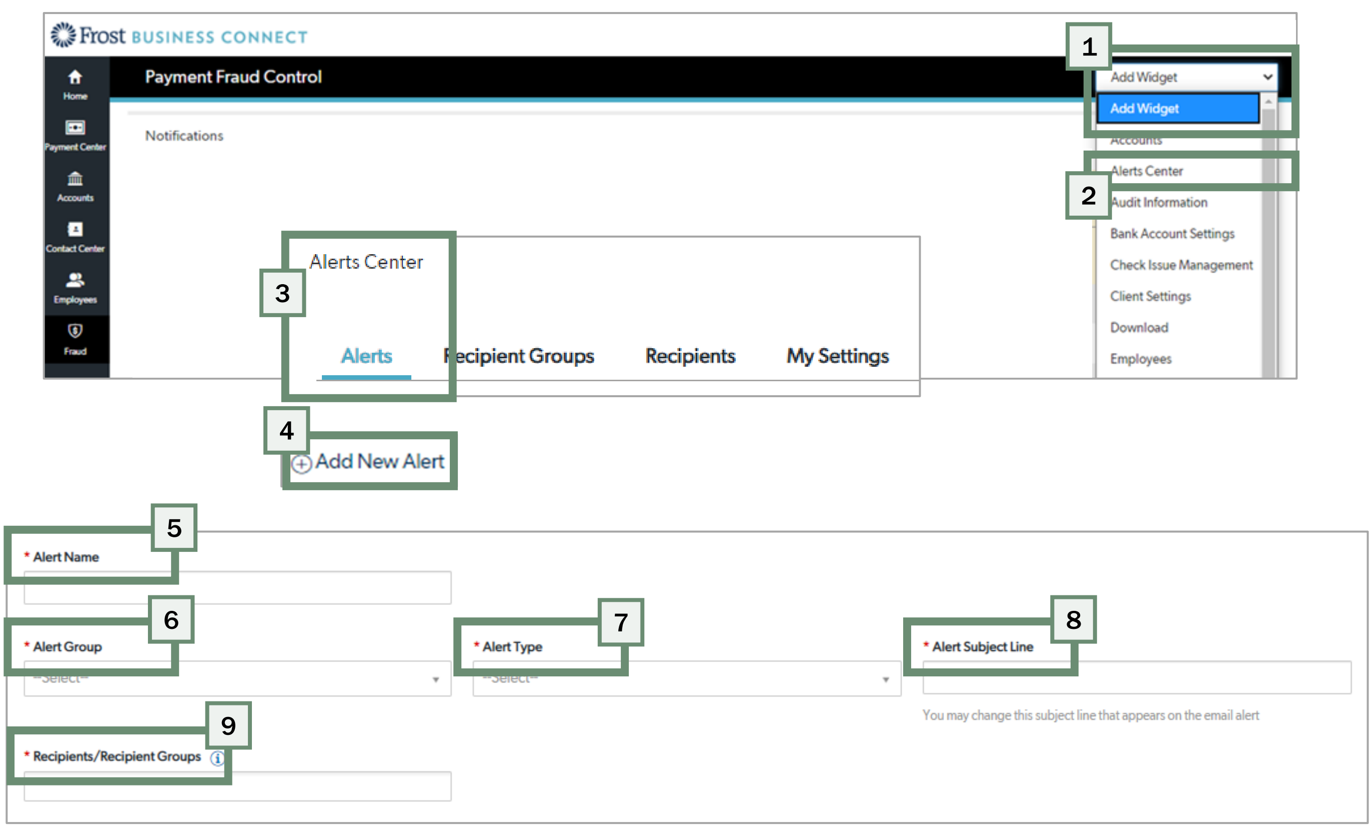
ALERTS USER GUIDE

BEST PRACTICE

Every user should follow the steps to add a new alert. This will add the Alert Center to the Home page.

ADD A NEW ALERT

1. On the **Home** page, click the drop down arrow next to **Add Widget**.
2. Click **Alerts Center**.
3. Click on the **Alerts** tab under **Alerts Center**.
4. Click **Add New Alert**.
5. Input **Alert Name**.
   NOTE: The **Alert Name** can only be a max of 35 characters and cannot have any symbols.
6. Select the desired **Alert Group** from the drop down menu.
7. Select the desired **Alert Type** from the drop down menu.
8. Input an **Alert Subject Line**.
   NOTE: The **Alert Subject Line** will automatically populate depending on the **Alert Type** you chose, but you may edit or completely change this section.
9. Select the **Recipient(s)** or **Recipient Group** who should receive this Alert.
   NOTE: You may add additional **Recipients** to this alert, but not a **Recipient Group**. Both Recipients and **Recipient Groups** cannot be added at the same time and only one **Recipient Group** can be added at a time.

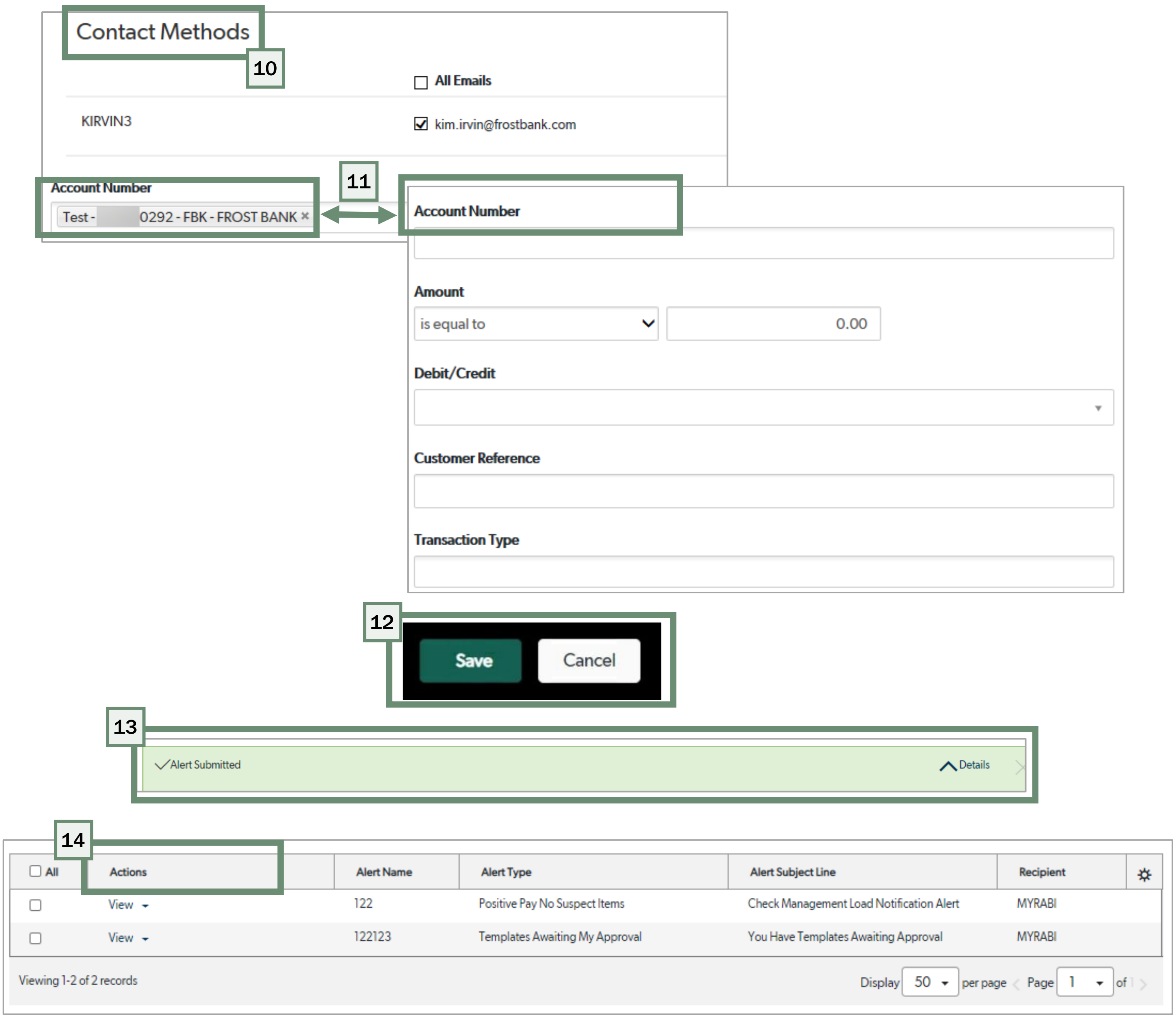


10. When the **Contact Methods** section appears, make sure the correct **Contact Method(s)** for each **Recipient(s)** are selected.
11. Choose the **Account Number(s)** you would like to receive this Alert for.

    NOTE: This option may change or not be available depending on alert type, select options as needed.

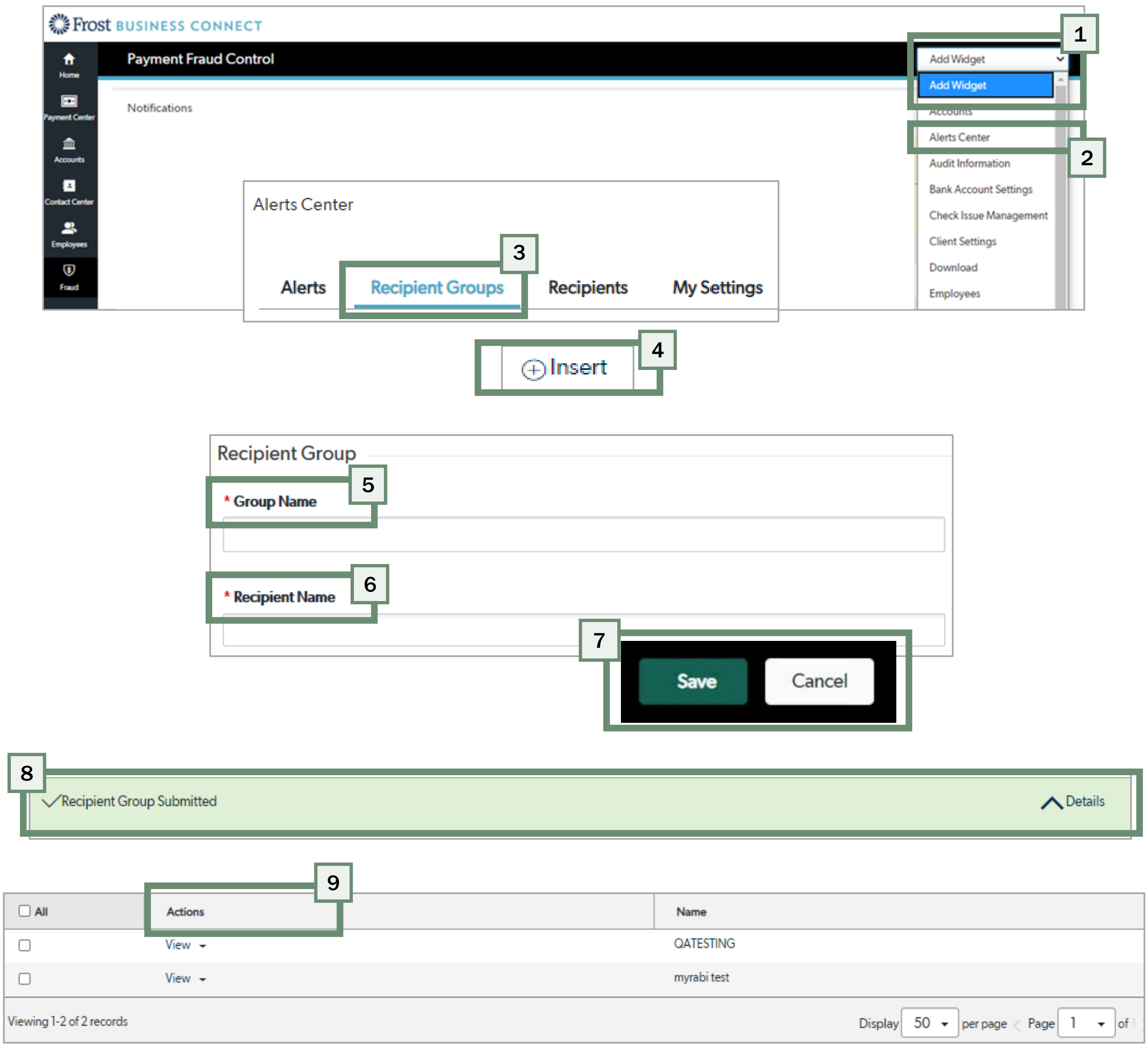
    NOTE: If no account is selected from the drop down, an alert will be received for all accounts.

    NOTE: Additional sections may appear after the account number is chosen, this is dependent on the **Alert Type** you have chosen above. (Example: Alert Type Transaction Notification)
12. Click **Save**.
13. You should then receive a green **Alert Submitted** banner if successful.
14. To **View**, **Modify** and/or **Delete** an existing Alert, click the drop down under the **Actions** column.



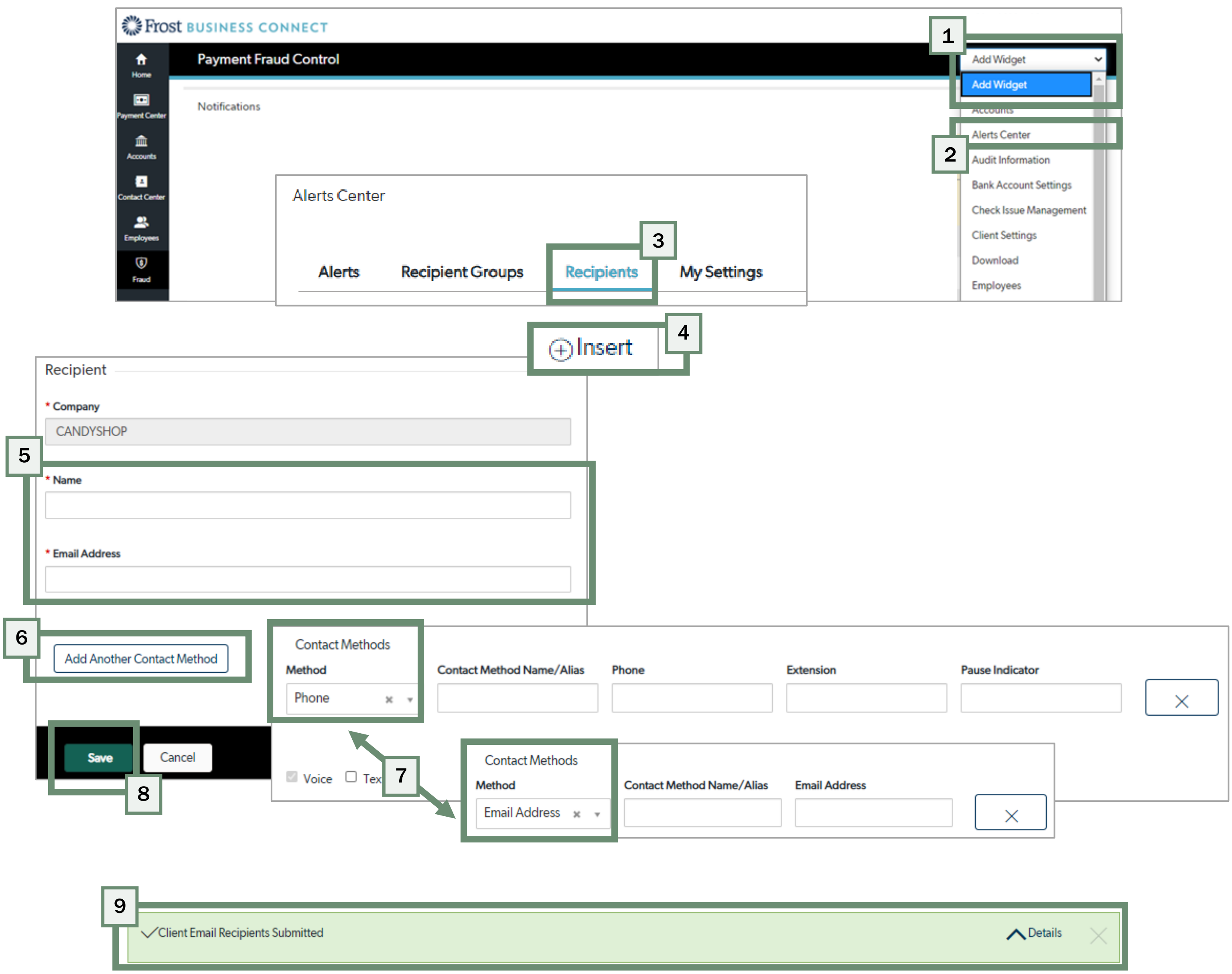
ADD A NEW RECIPIENT GROUP

1. On the Home page, click the drop down arrow next to **Add Widget**.
2. Click **Alerts Center**.
3. Click on the **Recipient Groups** tab under **Alerts Center**.
4. Click on **Insert**.
5. Input **Group Name**.
   NOTE: The maximum characters is 100 and can be numbers, letters and symbols.
6. Select **Recipient Name(s)**.
7. Click **Save**.
8. You should then receive a green **Recipient Group Submitted** banner if successful.
9. To **View**, **Modify** and/or **Delete** an existing Alert, click the drop down under the **Actions** column.



ADD A NEW RECIPIENT

1. On the Home page, click the drop down arrow next to **Add Widget**.
2. Click **Alerts Center**.
3. Click on the **Recipient** tab under **Alerts Center**.
4. Click on **Insert**.
5. Input the Recipient's **Name** and **Email Address**.
6. If you would like to add another **Contact Method** for the **Recipient**, you can do so by clicking on the **Add Another Contact Method** button.
7. Select **Method** type and re-enter **Contact Method Name** with new **Email** or **Phone**.
8. Click **Save**.
9. You should then receive a green **Client Email Recipients Submitted** banner if successful.



UPDATE YOUR ALERT SETTINGS

1. On the Home page, click the drop down arrow next to **Add Widget**.
2. Click **Alerts Center**.
3. Click on the **My Settings** tab under **Alerts Center**.
4. Enter your **Email**, **Phone** (for Voice Messages), **Mobile** (for SMS) and **Fax** if needed.
5. Click **Save**.
6. You should then receive a green **Success** banner if successful.