

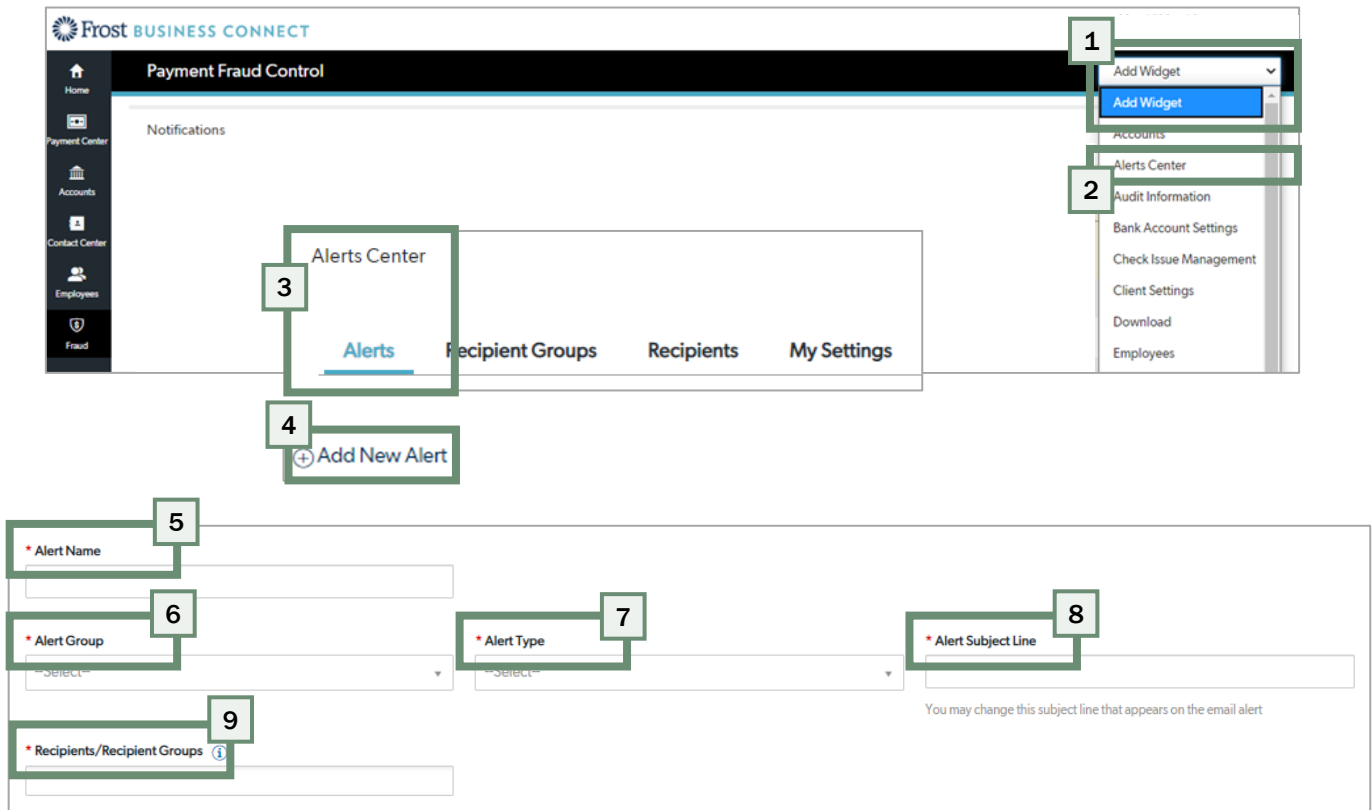
ALERTS USER GUIDE

BEST PRACTICE

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

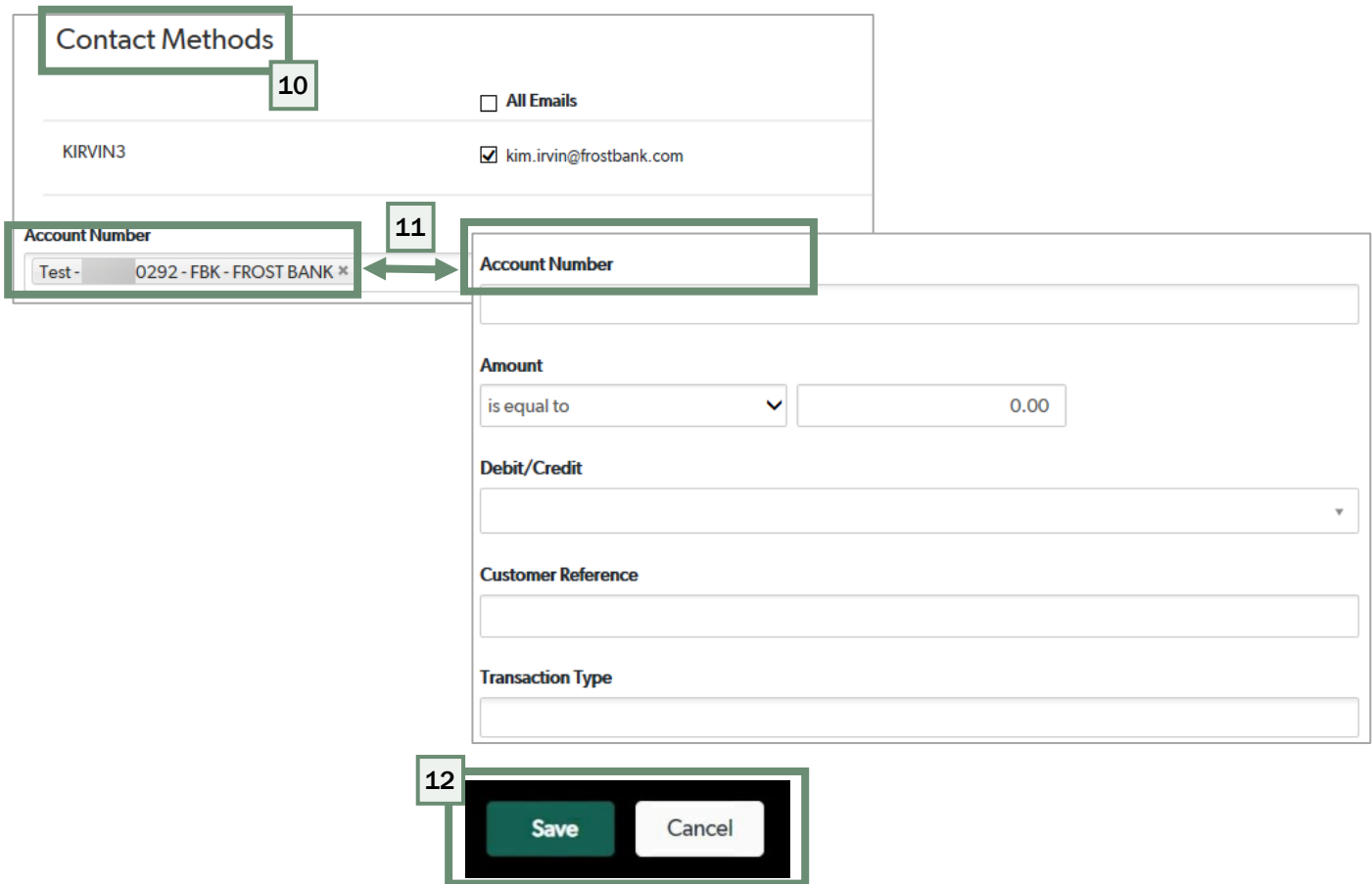
ADD A NEW ALERT

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.



The screenshot shows the Frost BUSINESS CONNECT interface. The top navigation bar includes 'Home', 'Payment Center', 'Accounts', 'Contact Center', 'Employees', and 'Fraud'. The main content area is titled 'Payment Fraud Control' and 'Notifications'. A dropdown menu is open, showing 'Add Widget' (highlighted with a green box and number 1) and 'Alerts Center' (highlighted with a green box and number 2). Below the dropdown, the 'Alerts Center' tab is selected (highlighted with a green box and number 3). The 'Add New Alert' button is highlighted with a green box and number 4. The form for adding a new alert is shown below, with fields for 'Alert Name' (number 5), 'Alert Group' (number 6), 'Alert Type' (number 7), 'Alert Subject Line' (number 8), and 'Recipients/Recipient Groups' (number 9). The 'Alert Subject Line' field has a note: 'You may change this subject line that appears on the email alert'.

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.



10 Contact Methods

All Emails

KIRVIN3 kim.irvin@frostbank.com

11 Account Number

Test - 0292 - FBK - FROST BANK x

Account Number

Amount

is equal to

Debit/Credit

Customer Reference

Transaction Type

12 Save Cancel

13 ✓ Alert Submitted [Details](#)

14

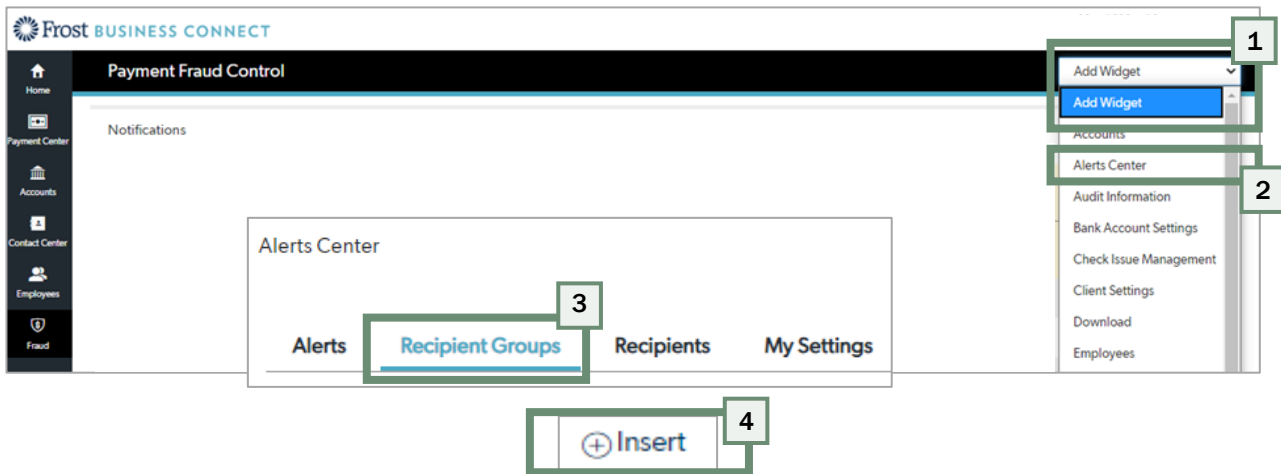
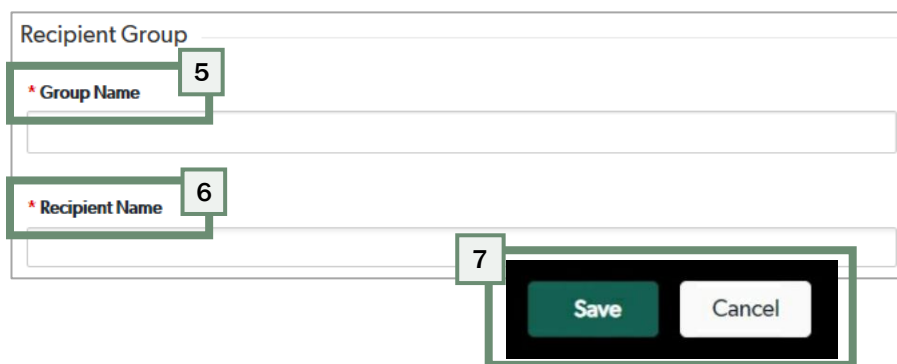
<input type="checkbox"/> All	Actions	Alert Name	Alert Type	Alert Subject Line	Recipient	⚙
<input type="checkbox"/>	View ▾	122	Positive Pay No Suspect Items	Check Management Load Notification Alert	MYRABI	
<input type="checkbox"/>	View ▾	122123	Templates Awaiting My Approval	You Have Templates Awaiting Approval	MYRABI	

Viewing 1-2 of 2 records

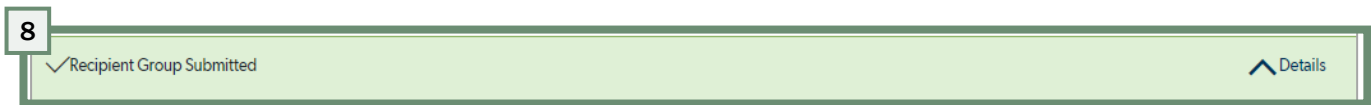
Display per page < Page of

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.

The screenshot shows the 'Recipient Group' form. It has two input fields: '* Group Name' (5) and '* Recipient Name' (6). Below the fields are 'Save' and 'Cancel' buttons (7).

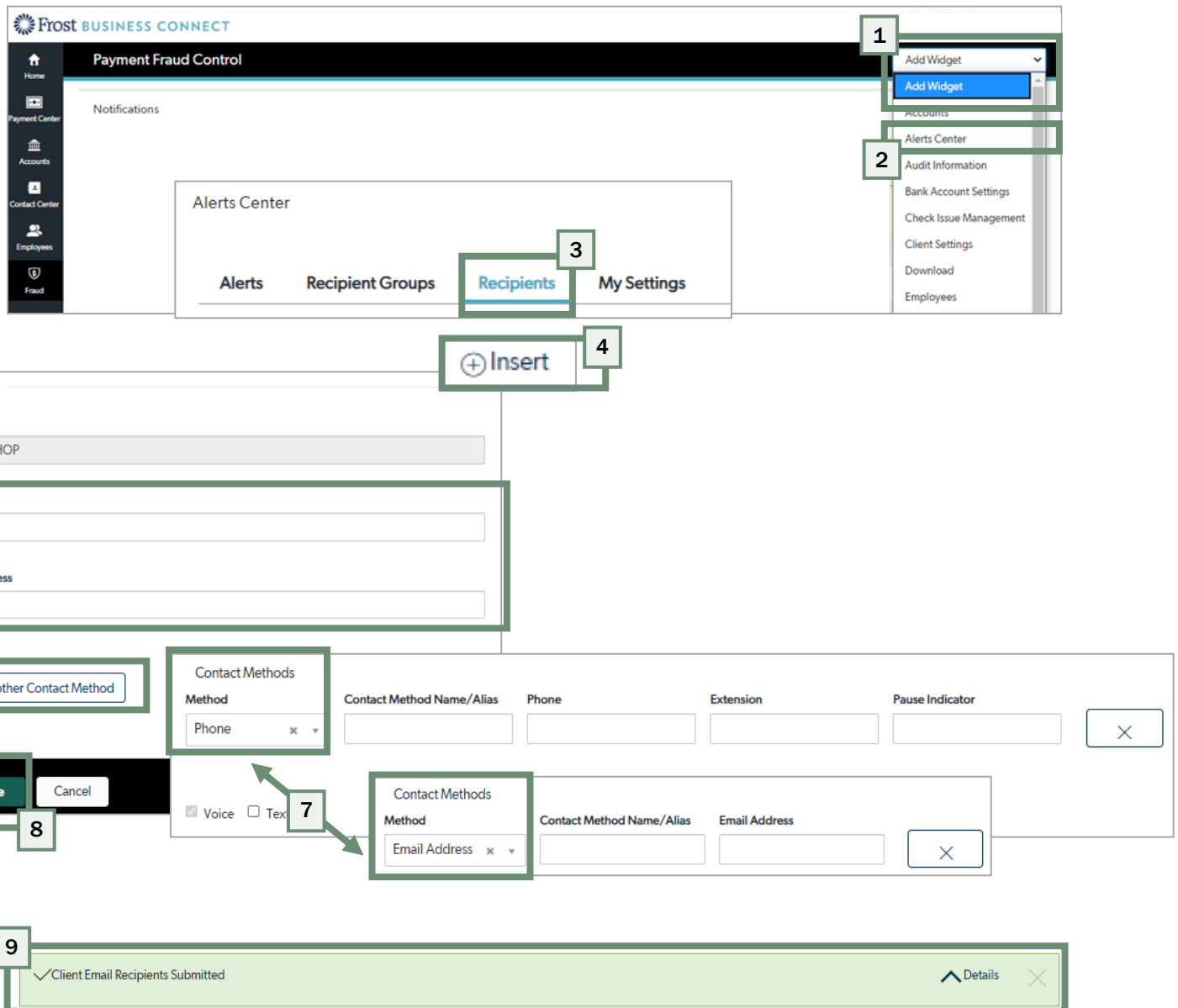



The screenshot shows a table with the following columns: 'All', 'Actions', and 'Name'. The 'Actions' column (9) contains a dropdown menu with 'View' options. The 'Name' column contains 'QATESTING' and 'myrabi test'. The table footer shows 'Viewing 1-2 of 2 records', 'Display 50 per page', and 'Page 1 of 3'.

All	Actions	Name
<input type="checkbox"/>	View ▾	QATESTING
<input type="checkbox"/>	View ▾	myrabi test

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.



The screenshot illustrates the process of adding a new recipient in the Frost BUSINESS CONNECT system. The interface is divided into several sections:

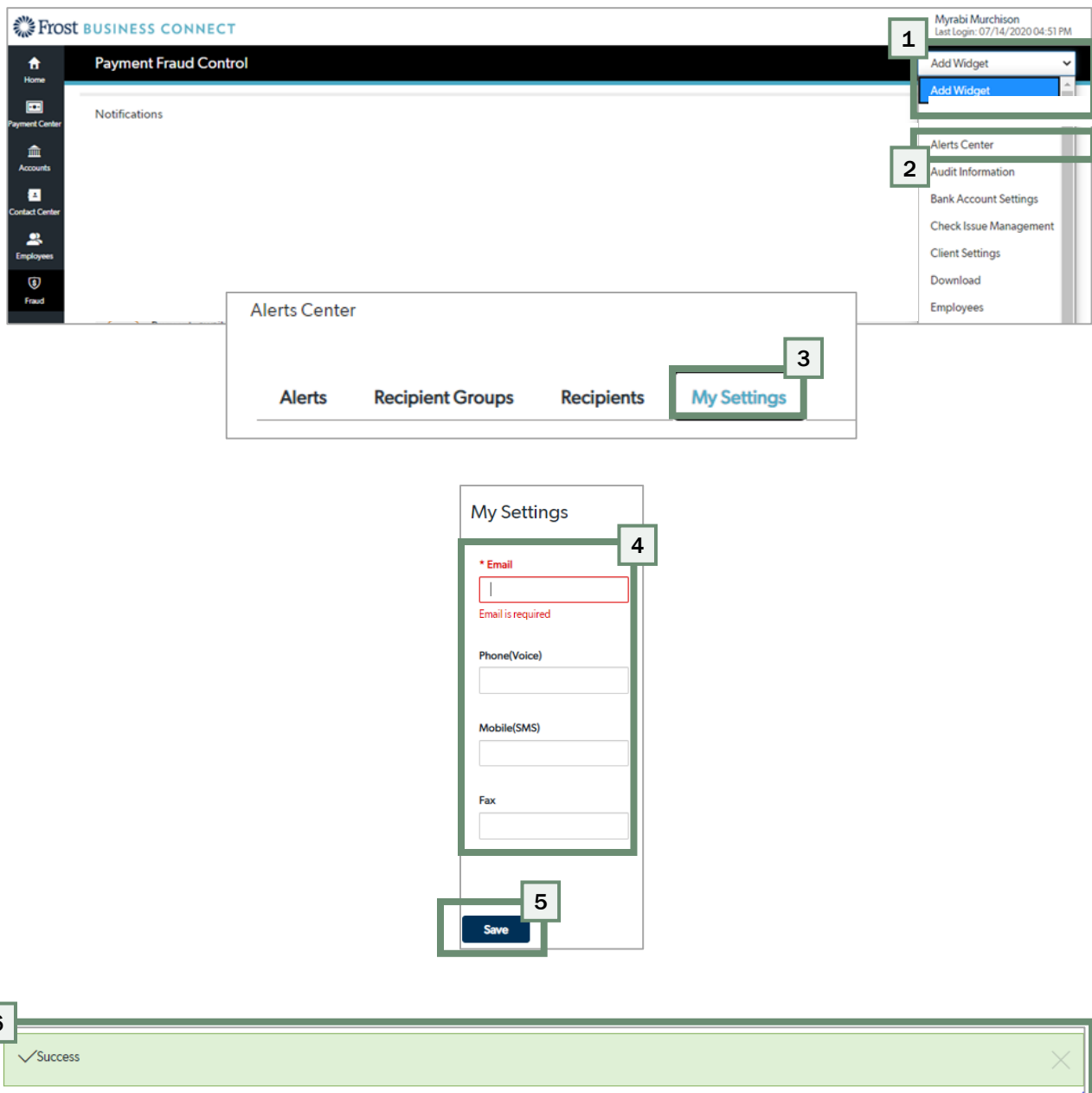
- Navigation:** A sidebar on the left contains icons for Home, Payment Center, Accounts, Contact Center, Employees, and Fraud. The top navigation bar includes Home, Payment Fraud Control, and Notifications.
- Alerts Center:** A central panel with tabs for Alerts, Recipient Groups, Recipients, and My Settings. The 'Recipients' tab is selected.
- Form:** A form titled 'Recipient' with the following fields:
 - Company:** A text field containing 'CANDYSHOP'.
 - Name:** A text field.
 - Email Address:** A text field.
- Contact Methods:** A section with an 'Add Another Contact Method' button and a table for adding methods.

Method	Contact Method Name/Alias	Phone	Extension	Pause Indicator
Phone				

Below the table are radio buttons for 'Voice' (checked) and 'Text'. A second 'Contact Methods' section is shown below, with a 'Method' dropdown set to 'Email Address' and fields for 'Contact Method Name/Alias' and 'Email Address'.
- Buttons:** 'Save' and 'Cancel' buttons are located at the bottom left of the form.
- Success Banner:** A green banner at the bottom reads 'Client Email Recipients Submitted' with a 'Details' link and a close button.

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.



The screenshot illustrates the process of updating alert settings in the Frost BUSINESS CONNECT system. It shows the user navigating from the Home page to the Alerts Center and then to the My Settings tab. The form includes fields for Email, Phone (Voice), Mobile (SMS), and Fax. A Save button is located at the bottom of the form. A green Success banner is displayed at the bottom of the screen, indicating that the settings were updated successfully.