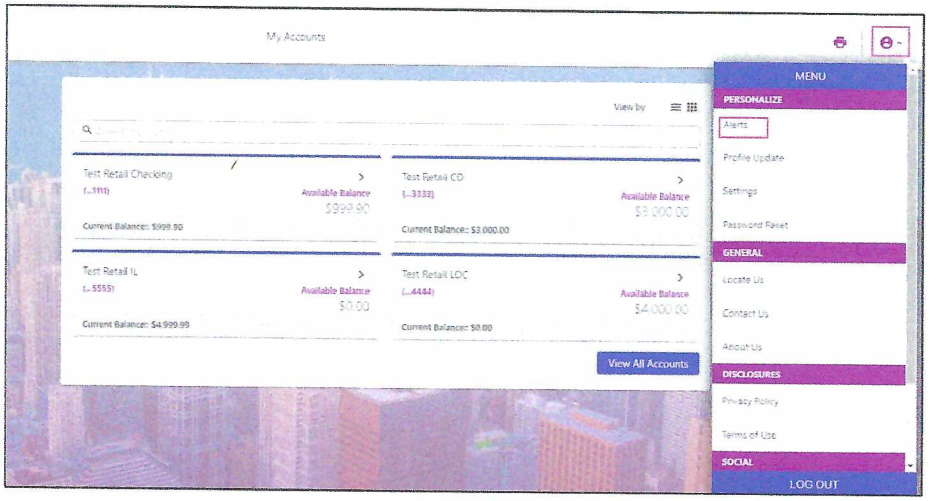
Alerts

The Alerts feature enables account holders to set up alerts either at the account level or for the purposes of security. Account level alerts can include alerts regarding balances and/or transaction descriptions. Security Alerts can include alerts regarding profile information changes, password changes, and/or changes to alert notifications.

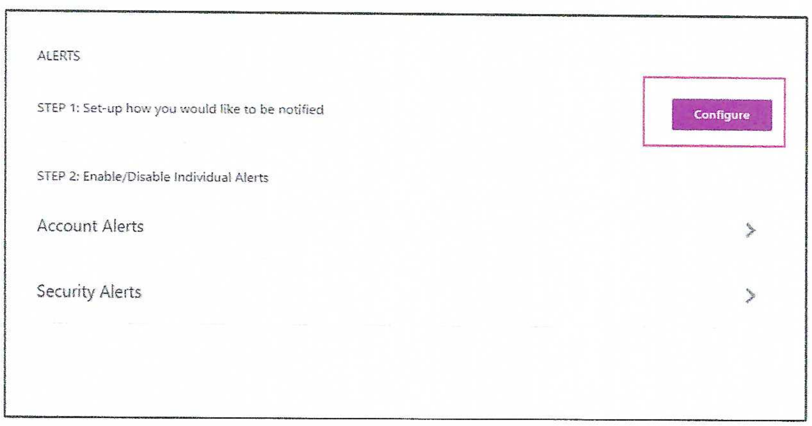
Email and SMS Alerts

Depending on your implementation, account holders can have the ability to receive account and security alerts via email and SMS (text). Before account holders can set up their alerts, they must first configure where to send the alerts.

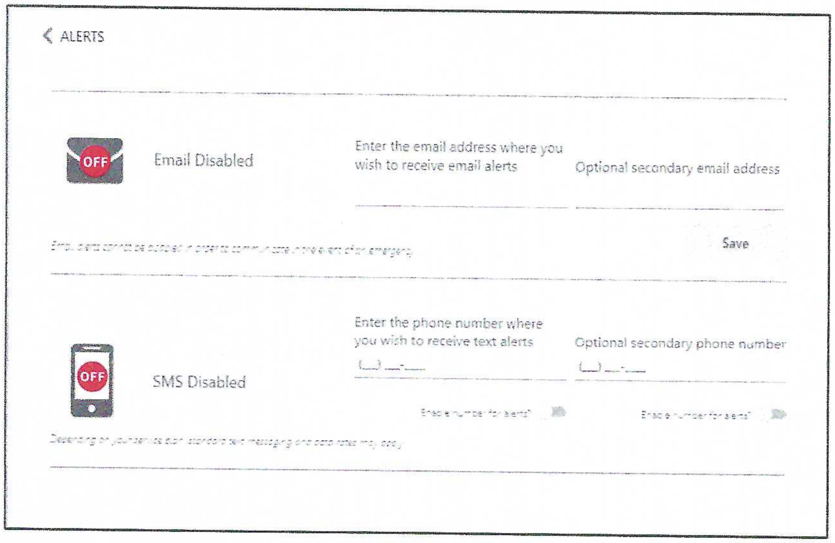
1. Click on the profile icon in the upper right corner and select **Alerts**.



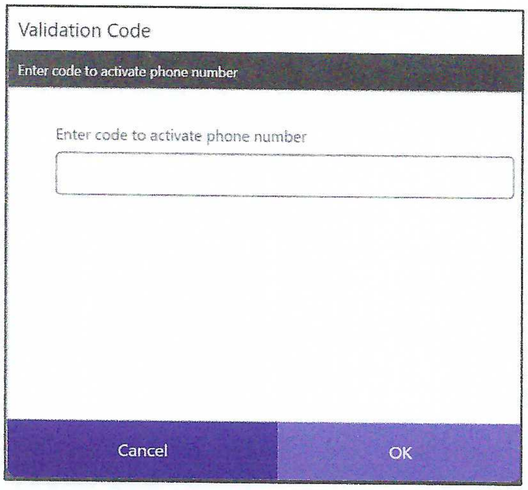
2. Click **Configure** to open the Alerts setup page.



3. Enter the email address and an (optional) secondary email address.



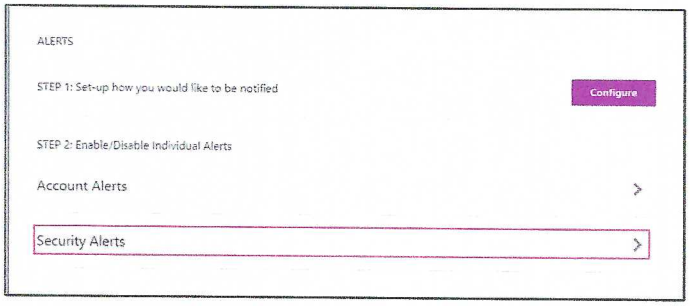
4. Enter a phone number and an (optional) secondary phone number if SMS alerts are being configured.
5. If a phone number is provided, the account holder is sent an out-of-band authentication code to verify the device and activate alerts for this phone number. This code must be entered to enable the mobile phone number for SMS alerts.
6. Enter the validation code and click **OK**.



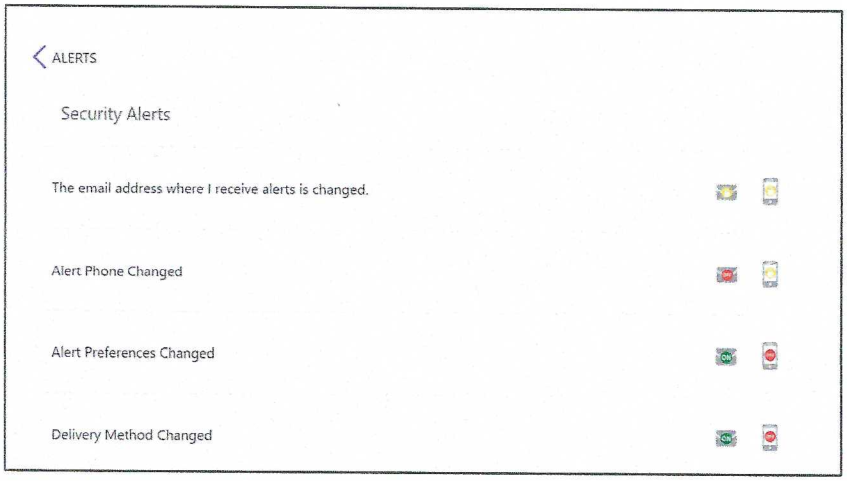
Security Alerts

Follow the instructions below to set up user-level security alerts.

1. Click on the profile icon in the upper right corner and select **Alerts**.
2. Click **Security Alerts**.



3. On the Security Alerts page, click the icons to the right of the alert to enable the alert. The envelope icon is to enable email alerts. The mobile phone icon is to enable SMS alerts.



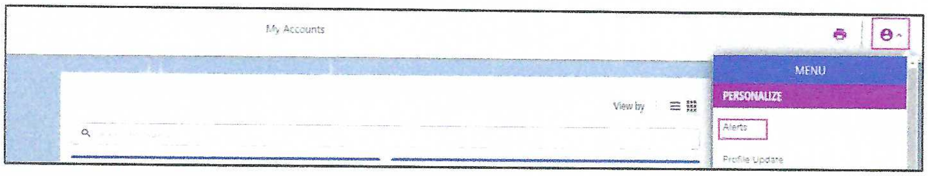
If a lock icon appears, it indicates the account holder cannot change that alert. Finastra can assist you in setting up locked alerts.

4. If the alert requires additional threshold information, a screen will display prompting the account holder for any additional information.

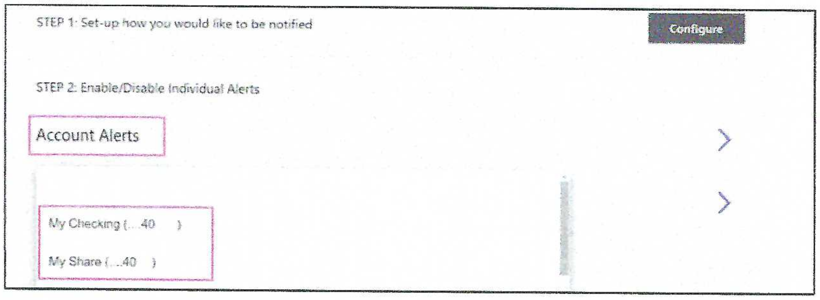
Account Alerts

Follow the instructions below to set up account-level alerts.

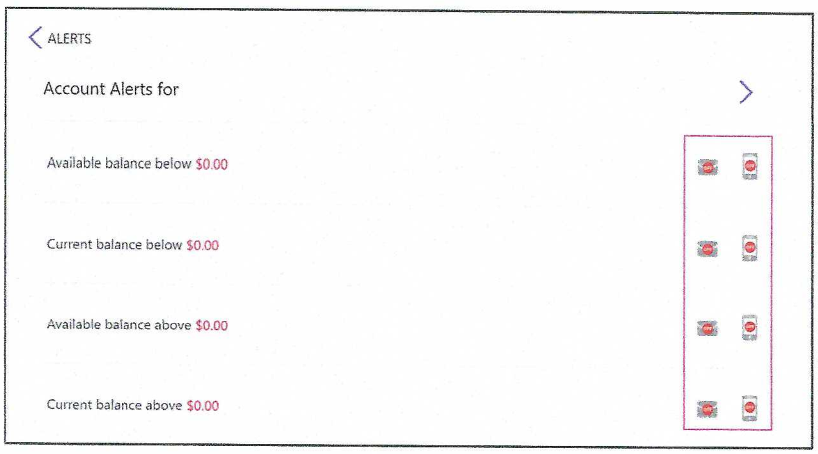
1. Click the profile menu in the upper right corner and select **Alerts**.



2. Click **Account Alerts**. A list of accounts will display.
3. Select the account name to set up alerts for that account.



4. On the Account Alerts page, click the icons to the right of the alert to enable the alert. The envelope icon is to enable email alerts. The mobile phone icon is to enable SMS alerts.



If the alert requires additional threshold information, a screen will display prompting the account holder for any additional information.