

Associated Connect[®]

Reference Guide: Alerts



Alerts

Alerts are messages sent to you by the system to inform or remind you about important transactions or account events. Alerts are for informational purposes only and not intended to supplement the procedure for processing transactions or to prevent fraud.

The alerts you can set are based on the services you have access to. Depending on your company setup, alerts may be set directly within My Profile, or they may be set by clicking on the **Edit** link within the Manage Core Banking Services section of My Profile.

Alerts Available Within “My Profile”

Alerts available on the My Profile page include the following (depending on your entitlements):

ACH Redeposit: An email is sent when there are ACH Redeposit items pending your review for next day processing.

Balance Threshold: An email is sent when the balance on one or more selected accounts has reached a specified threshold amount based on the beginning balance of the selected accounts at 7 a.m. (Ledger Balance for DDA accounts and Principal Balance for loan accounts)

Check Posted: An email is sent when a designated check posts to your account.

Credit Transaction: An email is sent when a credit transaction occurs.

Debit Transaction: An email is sent when a debit transaction occurs.

General Balance: An email is sent either daily or weekly with a depiction of the current available balance for a selected account.

New eStatement Available: An email is sent when a new eStatement is available for a selected account.

Scheduled Transfer: An email is sent a specified number of days before a scheduled transfer is made.

Secure Message: An email is sent when a new message is delivered to your Message Center inbox.

Enable Message Center Alerts:

1. On My Profile, click the **Enable message center alerts** checkbox to receive an email alert to your default email address on file on My Profile when secure messages are delivered to your Message Center inbox.
2. To stop receiving email alerts, click the checkbox to remove the checkmark.

Note: To receive a secure message alert to a different email address, please see the Add Alert section in this guide to set up a Secure Message Alert.

Add an Alert:

1. Click **My Profile**.
2. Click the **Add alert** link to add a new alert.
3. Select a Notification Type from the drop-down.
4. Your default email address on file in My Profile will appear in the Email Address field. You may enter a different email address if desired.
5. Select a Start Date by typing mm/dd/yyyy or using the calendar tool.
6. Select an End Date by typing mm/dd/yyyy or using the calendar tool, or click the checkbox for Until Further Notice.
7. Click **Submit** and the Add Alert confirmation displays.
8. Click **Close** to return to My Profile. Your list of account alerts will refresh the next time you visit My Profile.

Note: For each active alert, only one notification message will be sent to a specified email address each day for each event. You may set up the same notification for different email addresses.

Edit an Alert:

1. Click **My Profile**.
2. Click the **Edit** link next to the alert you want to modify.
3. Modify the available fields (see the Add Alert section in this guide).
4. Click **Submit** and the Edit Alert confirmation displays.
5. Click **Close** to return to My Profile. Your list of account alerts will refresh the next time you visit My Profile.

Remove an Alert:

1. Click **My Profile**.
2. Click the **Remove** link next to the alert you want to delete to open the Remove Alert dialog.
3. Click **Delete** to confirm you want to delete the alert and the Delete Notification confirmation displays.
4. Click **Close** to return to My Profile. Your list of account alerts will refresh the next time you visit My Profile.

Alerts Available Within “Core Banking Services”

Alerts available on the My Profiles-Manage Core Banking Services page include the following (depending on your entitlements):

Balance Threshold: An email is sent when the balance on one or more selected accounts has reached a specified limit.

Check Cleared: Receive alerts related to checks that have cleared.

Transactions Cleared: Receive alerts related to transactions that have cleared.

Positive Pay Exception: Receive alerts when the Positive Pay Exception file has been loaded and is ready to view.

Incoming Wire Received: Receive alerts related to incoming wires.

ACH Batch Release Requested – Daily Summary: Receive an alert when there are ACH batches in an "Entered" status to remind a user to log in and release for processing. The Alert is generated at 4:30 p.m. CT.

ACH Batch Release Requested – Multiple Times A Day: Receive an alert when there are ACH batches in an "Entered" status to remind a user to log in and release for processing. The Alert is generated at 8 a.m. CT, 10 a.m. CT, noon CT, 2 p.m. CT, and 4 p.m. CT. The alert is only generated once per batch.

Outgoing Wire Action Requested – Daily Summary: Receive a message sent before the end of the day as a reminder that some wires may require action to be taken before processing. These wires have a status of "Rejected", "Entered", "Approved", "Partial Approved", "Approved 2", or "Revised". This alert is sent at 3:30 p.m. CT.

Outgoing Wire Action Requested – Multiple Times A Day: Receive a message sent when there are wires that may require action to be taken before processing. These wires have a status of "Rejected", "Entered", "Approved", "Partial Approved", "Approved 2", or "Revised". This alert is sent at 10 a.m. CT, noon CT, and 2 p.m. CT. An alert is only generated once per wire.

Configure Your Contact Points

Use the Configure My Contact Points screen to enter email addresses to which you want alerts sent.

1. From My Profile, click **Edit** next to Manage Core Banking Services. Click **Configure My Contact Points** to designate up to four email addresses.

2. To add an email address, type the email address into a blank field, and click **Save Contact Points**.

A message that includes a confirmation code will be sent to each email address. Check the box next to the email address the code is assigned to, then enter or paste the confirmation code into the status field. Click **Save Contact Points** to activate the email address, or **Resend Confirmation Code** to send a new code.

3. To delete an existing email address, select the checkbox next to the email address you want to delete and click **Delete**.

Email Address	Alerts	Status
<input type="text"/>	<input type="checkbox"/>	Inactive
<input type="text"/>	<input type="checkbox"/>	Inactive
<input type="text"/>	<input type="checkbox"/>	Inactive
<input type="text"/>	<input type="checkbox"/>	Inactive

Save Contact Points Delete Cancel

Related Tasks: [Manage My Alerts](#)

Add New Alerts

Use the Add a New Alert screen to set up the types of alerts you want to receive. The types of alerts available to you will be dependent on the services your company subscribes to, as well as the entitlements granted on a user level.

1. From My Profile, click **Edit** next to Manage Core Banking Services.

Click **Add an Alert**. The Add a New Alert screen appears.

2. Click the Alert Type drop-down list and select the type of alert you want to add.
3. Select the way(s) you want to receive your alert: Secure Inbox and/or Internet Email. If you select Internet Email, a table appears with the email addresses you entered.

You can add up to four email addresses in these fields.

4. Select the checkboxes next to the email addresses that you want to use.

Add a New Alert

Select an Alert Type to begin the process of creating an alert.

Alert Type:

Save Alert Info Save & Add Another Cancel

Related Tasks: [Configure My Contact Points](#) [Manage My Alerts](#)

5. Click either **Save** or **Save & Add Another**.

Manage Your Alerts

Use the Manage My Alerts screen to edit an alert, delete an alert or add a new alert.

1. From My Profile, click **Edit** next to Manage Core Banking Services. Click **Manage My Alerts**.
2. To activate or deactivate an alert, select **Active** or **Inactive** from the drop-down box and then click **Save Changes**.
3. To edit an alert, click the alert you want to edit. The Edit Alert screen appears. Change the information in any of the fields, and click **Save** or **Save & Add Another**.
4. To delete an alert, select the check box next to the alert you want to delete and click **Delete**.
5. To add a new alert, click **Add a New Alert**. The Add a New Alert screen appears. Complete the alert settings, and then click either **Save** or **Save & Add Another**.

Alert Name	Alert Type	Status	Last Edited
<input type="checkbox"/> iwr	Incoming Wire Received	Inactive ▼	09/08/2011
<input type="checkbox"/> abr	ACH Batch Release Requested - Multiple Times a Day	Active ▼	05/14/2012
<input type="checkbox"/> owds	Outgoing Wire Action Requested - Daily Summary	Active ▼	12/08/2014

