ATB Online Business™

# Alerts Guide

ATB Financial™

# Getting Started with Alerts

Receive email notifications that will enable you to react faster, and avoid missing key deadlines for important transactions and day-to-day banking activities.

The Alerts service will notify you via email that certain transactions or events have occurred on your account. You can then login to ATB Online Business to review the transaction or event and action accordingly.

Types of Alerts available:

| | |
|---|---|
| **Balance** | Notifies you when a deposit account balance reaches your predefined criteria |
| **New Message** | Notifies you that ATB Financial has sent you a message through ATB Online Business |
| **Incoming Wire** | Notifies you that an incoming wire has been posted to your account |
| **Chargeback** | Notifies you that a cheque you deposited has been returned and posted to your account |
| **Approval Pending** | Notifies you when a payment or activity requires approval |
| **EFT Returns** | Notifies you when there has been an EFT return posted to your account for your EFT Service |
| **Positive Pay Exceptions** | Notifies you when positive pay exceptions are in need of a decision |

## Accessing Alerts

There are two types of access levels for the Alerts service in ATB Online Business. Both of these access types are automatically available to the Administrator however must be added to a User's role.

**Alerts** – This entitlement will enable the Alerts tab for a User and allow them to create a contact point using an email address, and then add available alerts.

**Alerts Management** – This entitlement will enable the Alerts Management sub-tab under the Administration tab for a User and allow them to create Balance, Incoming Wire, Chargeback and EFT Returns alerts rules.

## Next steps

### Administrator

- You will need to provide other Users with access before they can start using the Alerts service. Please go to Adding Alerts Access to a User's Role.
- You (or a User with Alerts Management access) will need to create the alerts rules for Balance, Incoming Wire, Chargeback and EFT Returns before other Users including yourself can add them. Please go to Creating an Alert Rule.
- You will need to create a contact point and add an alert to start receiving specific email alerts. This includes notifications you have created rules for such as Balance, Incoming Wire, Chargeback and EFT Returns. Please go to Adding an Alert.

### User

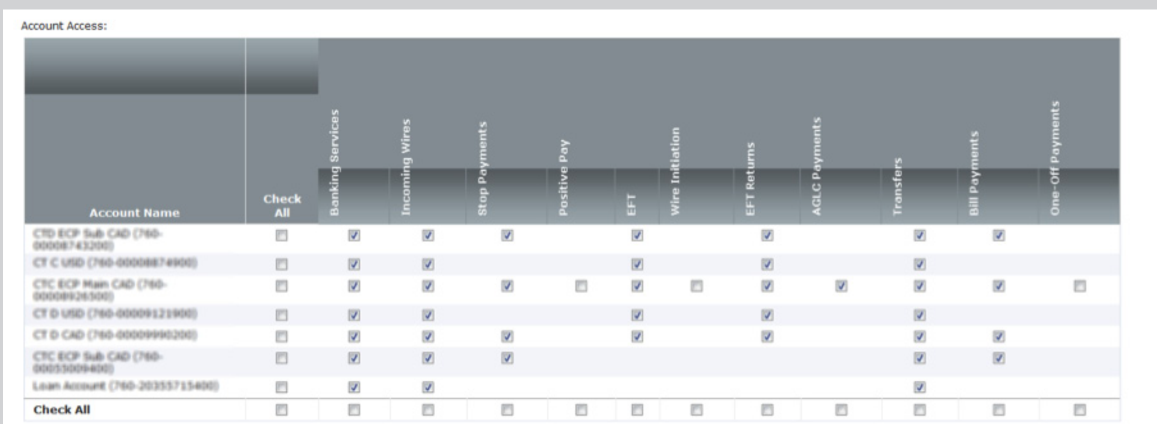
- Your Administrator will first need to update your role with Alerts access. You will then need to create a contact point and add an alert to start receiving specific email notifications. Please go to Adding an Alert.
- If you have Alerts Management access you can create alerts rules for Balance, Incoming Wire, Chargeback and EFT Returns. Please go to Creating an Alert Rule.

# Adding Alerts Access to a User's Role

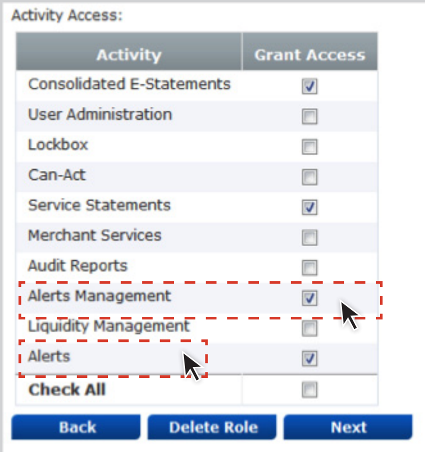
The Administrator must grant access to a role before a User can setup a contact point, add an alert or create an alert rule. Also, a role must have specific account level entitlement (Account Access) to be able to add certain alerts.

| Alert type | Account level entitlement required |
|---|---|
| Balance | Basic Services |
| Chargeback | Basic Services |
| EFT Returns | EFT Returns |
| Incoming Wire | Incoming Wire |
| Positive Pay Exceptions | Positive Pay |
| New Message | *not applicable* |
| Approval Pending | *not applicable* |

1. On the Administration tab menu, click Manage Roles.
2. Click the role that you wish to add alerts to or if this is a new role click Add a new role.
   ☞ For complete steps on adding a new role please see the [Administrator Guide](#).
3. As per the table above, you need to ensure the role is setup with the required account level entitlements in the Account Access area.



4. Alerts entitlements are located in the Activity Access portion of the role.




5. Select Alerts to entitle a role to setup a contact point and add an alert.
6. Select Alerts Management to entitle a role to create certain types of alert rules.
7. Click Next.
8. Click Save Role. On the verify screen that appears next, review the alert details changes to the role.
9. Click Save Role. A confirmation message will appear stating that the Edit for the role is successful.

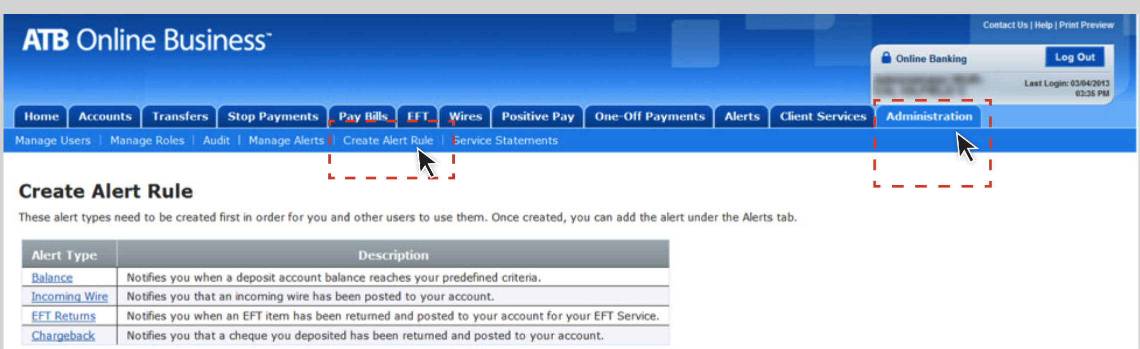
# Creating an Alert Rule

As an Administrator or User with Alerts Management access, you will be able to create, view, edit and delete alert rules for your company.

The following types of alerts require the Administrator or a User with Alerts Management access to create the alert rule before a User, including the Administrator, can subscribe to them:

☞ Balance, Incoming Wire, Chargeback, EFT Returns

1. On the Administration tab menu, click Create Alert Rule.
2. Select the type of alert you want to create.



3. Select the Account for which you want to create the alert.

4. Select any additional Criteria that you may need and enter the dollar Amount.

   ☞ Balance and Incoming Wire alerts require you to select Criteria (greater than, less than, equal to) and dollar Amount.
   ☞ EFT Returns and Chargeback alerts only require you to select an Account.

5. Click Next.


6. On the verify screen that appears next, review the alert details and click Create Alert.

7. A confirmation message will appear. You will now see the newly created alert under Manage Alerts.

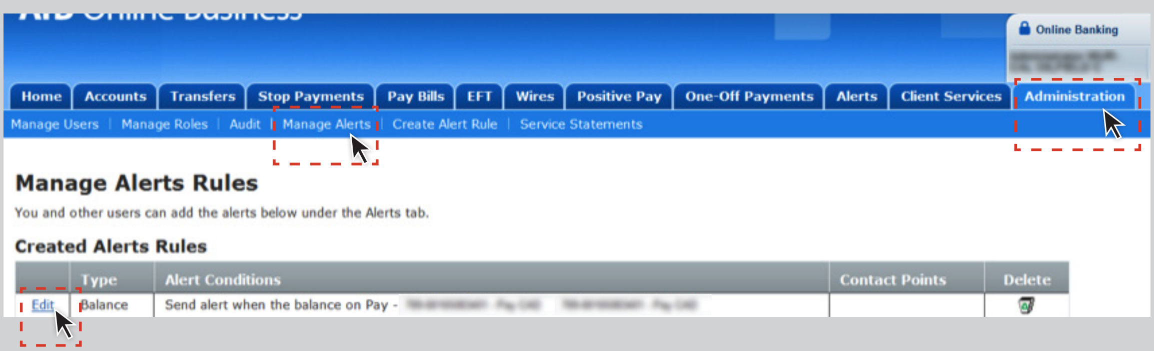
### *Important*

- A maximum of three rules can be created per deposit account for Balance and Incoming Wire Alerts.
- In order for a User, including the Administrator, to receive an alert the User needs to add the alert.

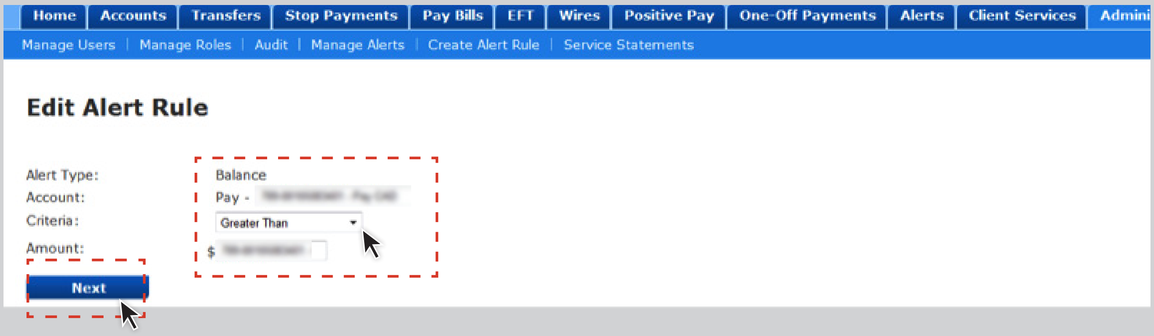
## Edit an Alert Rule

1. On the Administration tab menu, click Manage Alerts.

2. Next to the alert rule you want to edit, click Edit.



3. Enter any required changes to the alert criteria and click Next.



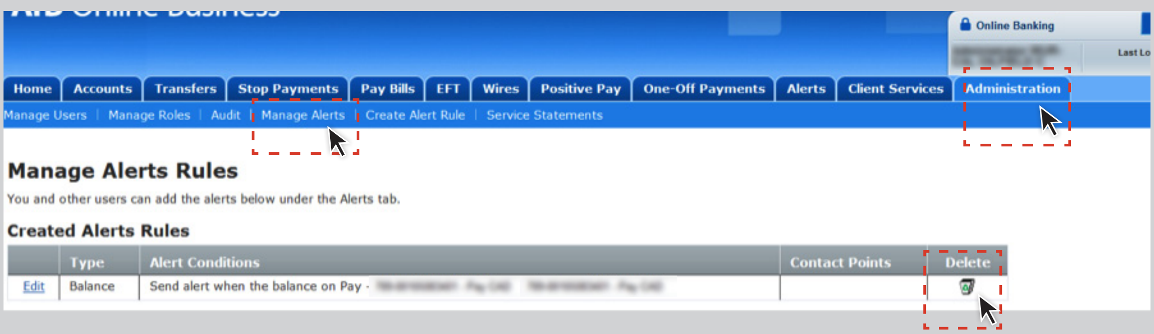

4. On the verify screen that appears next, review the alert details and click Edit Alert.

5. A confirmation message will appear.

## Delete an Alert Rule

1. On the Administration tab menu, click Manage Alerts.

2. Next to the alert rule you want to delete, click the Delete button.




3. On the verify screen that appears next, click Delete Alert.

4. A confirmation message will appear.

*Important*

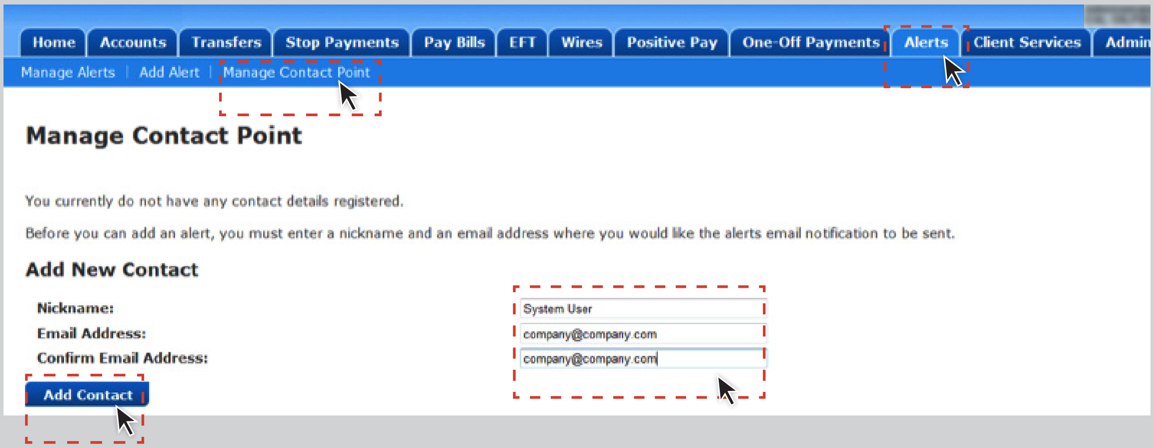
- When an alert rule is deleted, all Users who have added it will stop receiving it.

# Adding an Alert

Before an Administrator or User can add an alert they must setup a contact point.

## Manage Contact Point

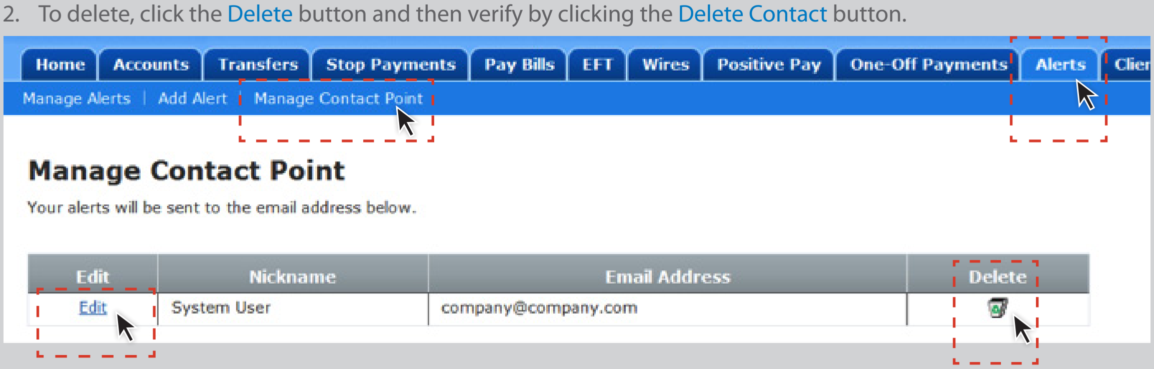
1. On the Alerts tab menu, click Manage Contact Point.
2. Enter your contact details and select Add Contact.



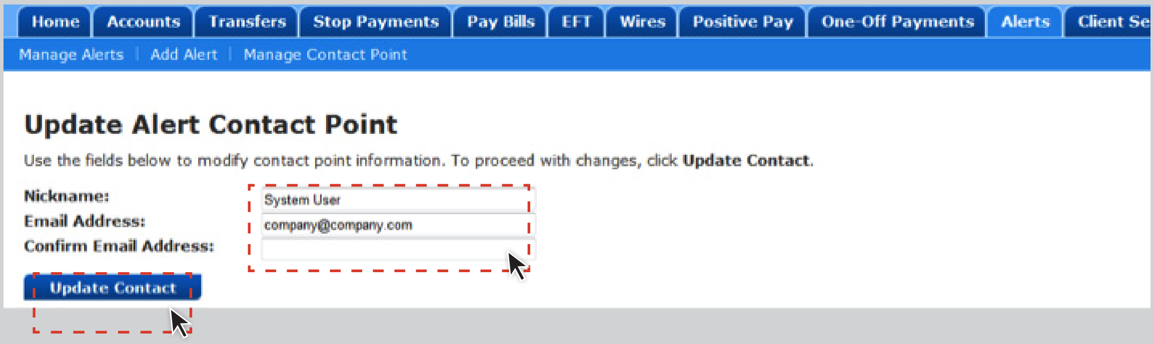

3. A confirmation message will appear.

## Edit or Delete a Contact Point

1. On the Alerts tab menu, click Manage Contact Point.
2. To delete, click the Delete button and then verify by clicking the Delete Contact button.



3. To edit click the Edit link, update your contact details and click Update Contact.




## Add an Alert

The Administrator must grant Alerts access to a role before a User can setup a contact point and add an alert. A role must have specific account level entitlements (Account Access) to be able to add certain alerts.

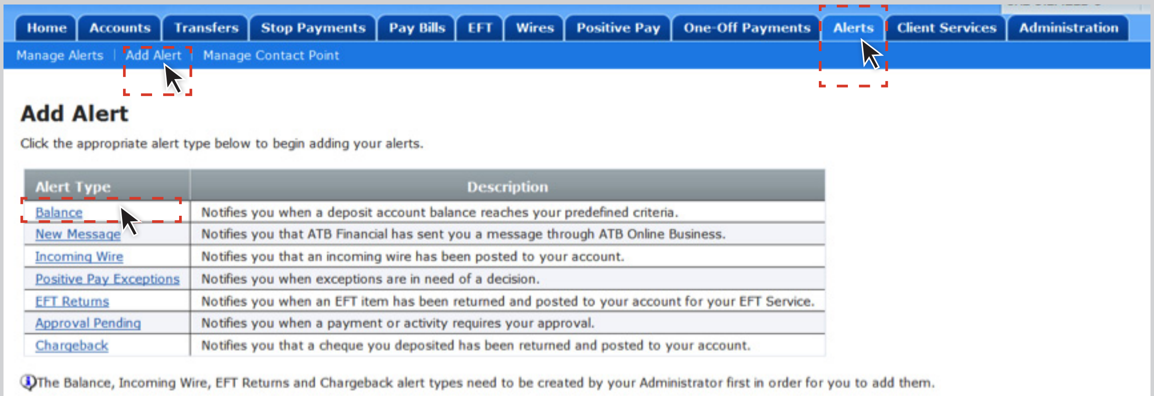
| Alert type | Account level entitlement required |
|---|---|
| Balance | Basic Services |
| Chargeback | Basic Services |
| EFT Returns | EFT Returns |
| Incoming Wire | Incoming Wire |
| Positive Pay Exceptions | Positive Pay |
| New Message | *not applicable* |
| Approval Pending | *not applicable* |

### *Important*

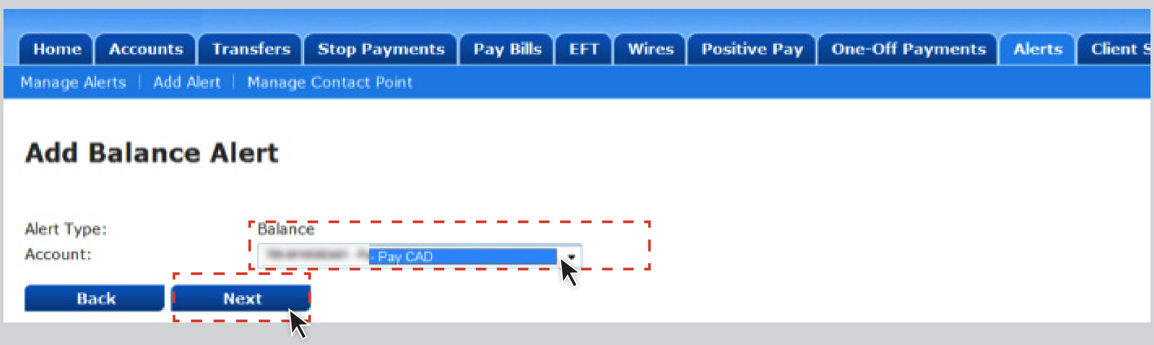
- For Balance, Incoming Wire, Chargeback and EFT Returns alerts, the alert rule needs to first be created by the Administrator or a User with Alerts Management access.
- A User without approval entitlements can still setup an Approval Pending alert.

1. On the Alerts tab menu, click Add Alert.

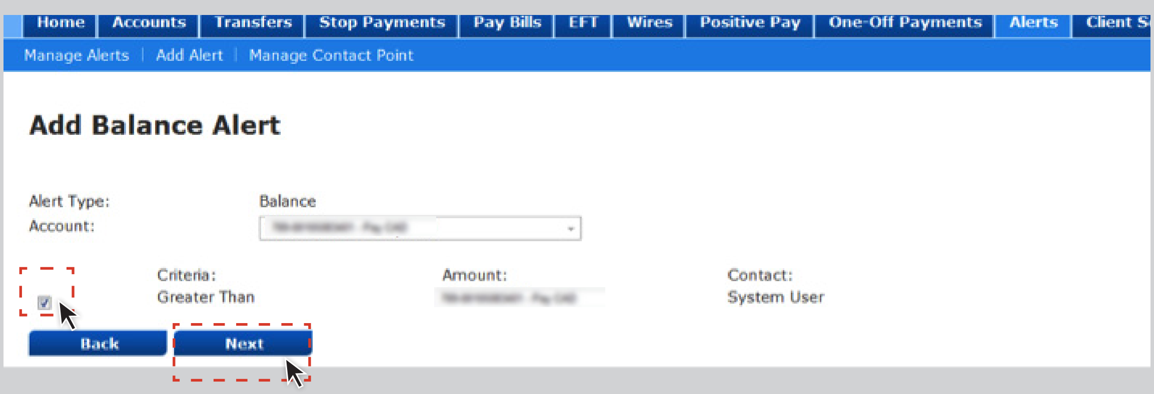
2. Select the type of alert you want to add. A Balance alert example is provided below.




3. Select the Account and then click Next.




4. Select the required Alert details and click Next.



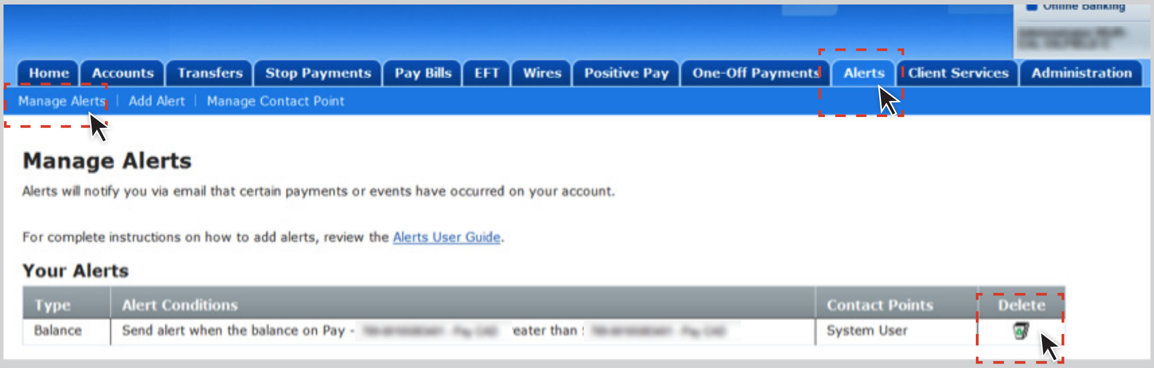

5. On the verify screen that appears next, review the alert details and click Add Alert.

6. A confirmation message will appear.

## Delete an Alert

1. On the Alerts tab menu, click Manage Alerts.

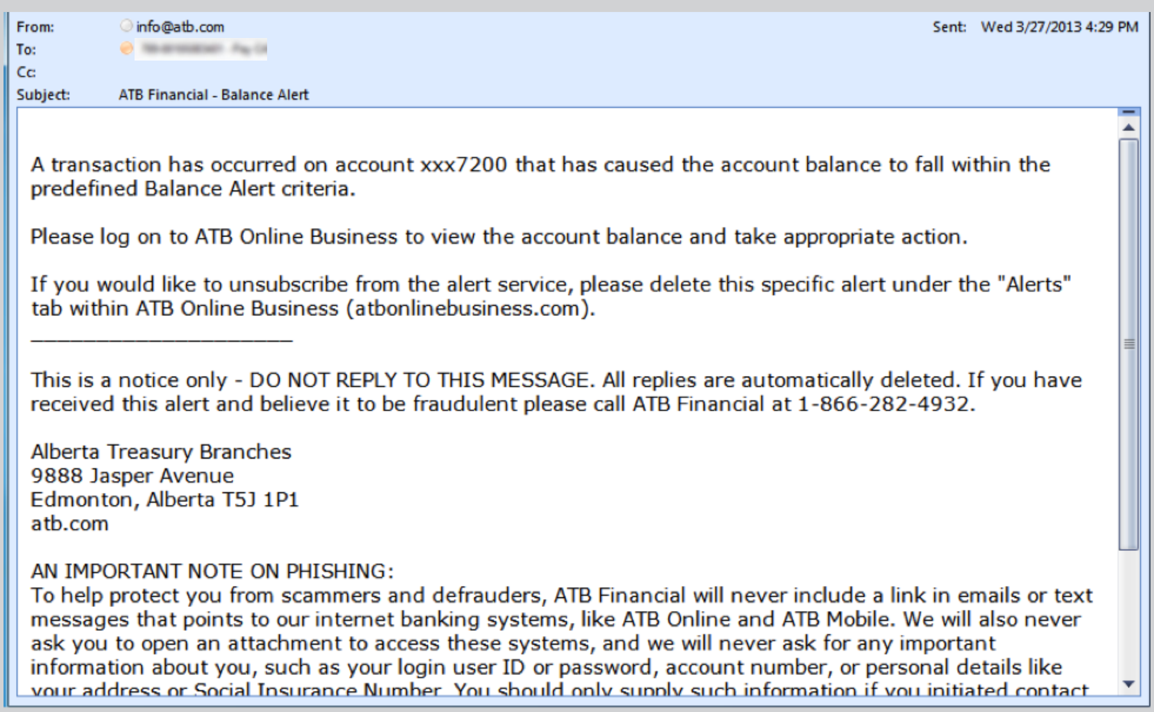
2. Select the Delete button next to the Alert you want deleted.




3. On the verify screen that appears next, review the alert to be deleted and click Delete Alert.

4. A confirmation message will appear.

## Example of a Balance email notification:



From: info@atb.com

Sent: Wed 3/27/2013 4:29 PM

To:

Cc:

Subject: ATB Financial - Balance Alert

A transaction has occurred on account xxx7200 that has caused the account balance to fall within the predefined Balance Alert criteria.

Please log on to ATB Online Business to view the account balance and take appropriate action.

If you would like to unsubscribe from the alert service, please delete this specific alert under the "Alerts" tab within ATB Online Business (atbonlinebusiness.com).

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This is a notice only - DO NOT REPLY TO THIS MESSAGE. All replies are automatically deleted. If you have received this alert and believe it to be fraudulent please call ATB Financial at 1-866-282-4932.

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AN IMPORTANT NOTE ON PHISHING:
To help protect you from scammers and defrauders, ATB Financial will never include a link in emails or text messages that points to our internet banking systems, like ATB Online and ATB Mobile. We will also never ask you to open an attachment to access these systems, and we will never ask for any important information about you, such as your login user ID or password, account number, or personal details like your address or Social Insurance Number. You should only supply such information if you initiated contact

*Important*

Make sure to add **info@atb.com** and **atbonlinealerts@atb.com** to your Safe Sender's list or Approved Senders list in your email software to ensure the alerts emails do not end up in your junk mail.

## If you have any questions about how to manage the Alerts service, please contact us:

**Business & Agriculture clients: 1-866-282-4932**
**Corporate Financial Services clients: Cash Management Support 1-877-363-4855**