WebsterBank®

## Quick Reference Guide

# Alerts - Create in Webster Web-Link®

Alerts serve to notify you when certain conditions that affect your accounts or online banking have been met or when certain events have occurred. There are two types of Alerts; Security and Optional.

- **Security Alerts** are sent for situations such as your password has been reset, contact information has been updated or a user has been unlocked; this type of alert can't be turned off
- **Optional Alerts** are those you choose to enroll in for conditions that you select. Some examples of situations that can generate optional alerts are: cleared checks, changes in the status of a payment, or incoming wires.

All alerts are sent automatically to your Web-Link inbox. You can also choose to send alerts to your email address, or to other people within your organization. This is useful when an someone who is not set up as a Web-Link user needs to be alerted to one of these conditions. Text alerts can be sent too, once the mobile number associated with your user profile is added to the alert.

Many of the optional Alerts are triggered after Web-Link receives the associated information into the Web-Link database; this is typically triggered by a user login.  Example:  if you have enrolled in the Wire Confirmation Alert for Credits and a wire is credited to your account at 10:30 am ET, and the first time a user logs in from the organization is at 1:00 pm, the Wire Confirmation alert will be sent at 1:00 pm.  If no user logs in that day, no alert will be sent.

Use this guide in conjunction with the descriptions contained in other Alert related QRGs to learn which of the available alerts best meets your business needs.

**Important Note:** To ensure delivery, add the following addresses – from which all Web-Link alerts are sent – as familiar contacts:

- Email: **WebsterWebLinkNotifications@WebsterBank.com**
- Mobile: 269265

The Alert feature is located under the Tools tab in the top navigation bar on Web-Link.

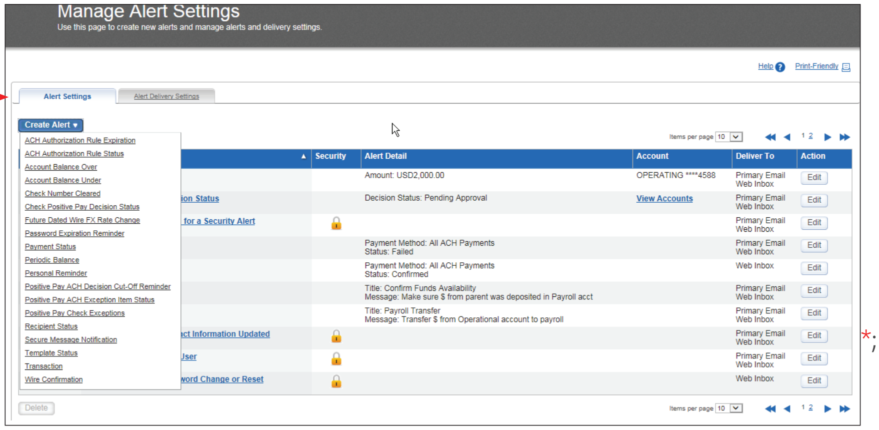
| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Treasury Dashboard | Accounts | Payments | Fraud Control | Check Services | File Services | Tools | Administration |

*Depending on your entitlements, the top navigational bard may appear different, e.g. Home instead of Treasury Dashboard.*

### Create an Optional Alert:

***Tools > Manage > Alert Settings***

1. In the Tools tab, under the Manage menu, click on Alert Settings.
   The Manage Alert Settings screen opens.
2. Click the Create Alert button;
   a list of Optional Alerts displays.
3. Click the Alert link you wish to enroll in; the Create Alert screen displays
4. Enter required information in fields indicated by a red asterisk required information varies depending on the selected alert.
5. Select all Deliver To addresses that you want to receive this alert.



6. Click Submit when the information entered is complete and accurate, and then you will be redirected to the Manage Alert Settings screen. A successful submit message will display.

You have now enrolled in the alert. To verify that you enrolled correctly, check to see that it displays in the Alert Settings tab of the Manage Alert Settings screen. When the enrolled condition is met, the alert will be sent to your Web-Link Inbox and any other delivery methods you selected.

## Tips:

- Some optional Alerts notify you to the same event e.g. Wire Confirmation and Transaction Alert for wire credits. To avoid confusion, enroll in only one alert for the same type of transaction
- When selecting a status for the Payment Status alert, consider choosing only those that indicate a final state such as Failed or Confirmed. You will receive more than one alert for a single transaction when you select other statuses, such as Sent and Confirmed or Received by Bank and Confirmed.
- To be alerted to transactions that happen throughout the current business day using the Transaction Alert, users need to log in and view account details. A Transaction alert is not sent if no user logs in or logs in before a selected transaction is received. (Note: Transaction alerts are sent current and prior day)
- For alerts that include dollar amounts or thresholds, enter the values as shown here: 1000 for $1,000.00, or 10001.20 for $10,001.20.
- Alerts are suspended when an ID is deactivated, or deleted.

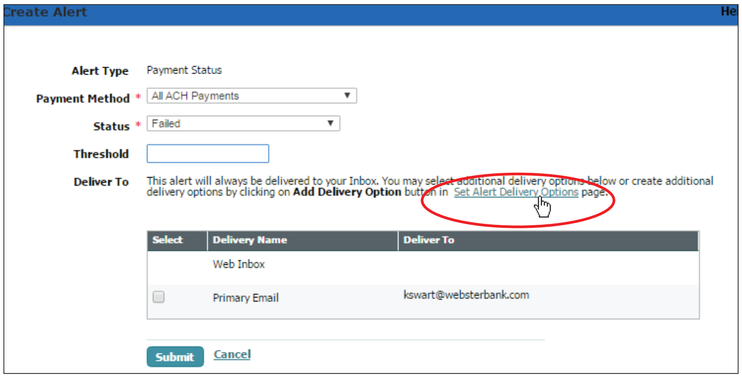
## Set up Additional Delivery Options:

***Tools > Manage > Alert Settings***

1. In the Tools tab, under the Manage menu, click on Alert Settings. The Manage Alert Settings screen opens.
2. Click the Alert Delivery Settings tab.
3. Click the Add Delivery Option button:
   a. Select Email to add a new email address
   b. Select Text to add a new mobile number
4. Enter the required information and as desired, any optional fields such as Quiet Window (times during which you do not want alerts to be sent to you).
5. Click Done. A Successful Submit message appears. You can now enroll alerts to this delivery option.

## Tips:

- A user's email address is not updated in the alert system when a change is made to it in the User's profile. If existing and new alerts should be sent to it, you can edit it from the Alert Delivery Options tab.
- Add an additional Delivery Option during the Create Alert process by clicking the Set Alert Delivery Options link displayed on the Create Alert screen.
- To send the alert to destinations other than your Web-Link Inbox when it already exists as a Delivery Option, select it from the list of Delivery Names displayed on the Create Alert screen.




Updated 04/2020

**If you have any questions, contact your Client Support Specialist.**