



Fulton Bank
BOSS



Quick Reference Guide



BOSS Alerts



Published on 4/10/2019

Alerts

This widget configures the system to automatically send alerts when certain conditions occur. For example, a Closing Available Balance alert can be sent when a closing account balance falls below a certain threshold or an alert can be sent when a positive pay suspect file is received from the bank.

Although you can specify the recipient directly on the alert screen, we recommend that you set up recipients or recipient groups before creating alerts.

Adding a Recipient

To add a recipient:

1. Select **Alerts Center** from the **Administration & Settings** menu. The Alerts Center appears.
2. Click **Recipients**, and then click **Insert**.
The system displays the Recipients screen. It displays the current company name; this can't be changed.
3. Enter the recipient name and email address.
4. If you want to add a different method of contact for this recipient, click **Add another Contact Method**.
5. Use the drop-down to select a contact method.

6. Enter the secondary contact information.
 - If you are entering a phone number, note that you can also enter an extension and pause indicator, for example, a **9** when dialing out of a business office. In addition, check the appropriate checkbox indicating whether the contact should be sent a voice or text message.
 - The value entered in the **Contact Method Name / Alias** field will be displayed on the alert creation screen.

Recipient

Company *
DGBCEU

Name *
Steve Harmon

Email Address *
sharmon@gmail.com

Contact Methods

Method	Contact Method Name/Alias	Email Address
Email Address * ▾	Steve's personal account	stevieh@yahoo.com

[Add Another Contact Method](#)

✓ Save Cancel

7. To add another contact method, repeat steps [4](#) through 6.
8. Click **Save**.

Adding an Alert

To add an alert:

1. Select **Alerts Center** from the **Administration & Settings** menu. The Alerts Center appears.

2. Click **Add New Alert**.

3. In the **Alert Name** field, enter a name for the alert.
4. From the **Alert Group** list, select the appropriate group for this alert. For example, *Payments*.
5. In the **Alert Type** field, select the type. For example, if you chose the Payments alert group, you might choose *Payment Processed* as the alert type.
6. In the **Alert Subject Line** field, a sample subject line appears based on the alert type you have chosen. If desired, change it.
This is the subject line that will appear on the email notification sent to the recipient.
7. Depending on the alert group and alert type you have chosen, you may be required to enter additional information. For example, if you choose the alert type Electronic Positive Pay Decision Pending Approval, you must enter the hour and minutes when approval is required, plus the applicable time zone.
8. Use the **Recipients/Recipient Groups** drop-down to select a You can select one or more recipients OR one recipient group.

9. In the **Contact Methods** section, check the checkbox(es) for the appropriate contact method or methods.

The screenshot shows the 'New Alert' configuration page. The 'Alert Name' is 'New Trans', 'Alert Group' is 'Information Reporting', and 'Alert Type' is 'Transaction Notification'. The 'Recipient' is 'Steve Harmon - sharmon@...'. In the 'Contact Methods' section, the 'All Emails' checkbox is checked. Red arrows point to the 'All Emails' checkbox with the text 'Click "All" to use all contact methods' and to the 'Contact methods can include an alias' text.

If the recipient or recipient group includes an additional contact method, you can select that as well. OR check the **All** box to have the alert sent through all contact methods.

10. Most alerts also require you to enter trigger criteria for the alert. For example, you may have to specify an account number or action that will trigger the alert.
11. When you have entered all the necessary fields, click **Save**.

Now, when the criteria specified in the alert are met, the recipient will be contacted using the specified method.