



**EASTERN TREASURY®**

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**Account Reconciliation & Positive Pay  
Alerts and Self Administration**

User Guide

October 2021

 **Eastern Bank**  
JOIN US FOR GOOD®

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# IMPORTANCE of ALERTS

Alerts are messages that inform company users that a specific event has taken place and help companies reduce the risk of fraud. Alerts are accessed from the **Administration** section.

Setting up Alerts is **strongly recommended** to ensure exception items and other activities that require attention are addressed in a timely manner.

This User Guide documents the steps to setup, maintain and understand the various Alerts available for Account Reconciliation and Positive Pay.

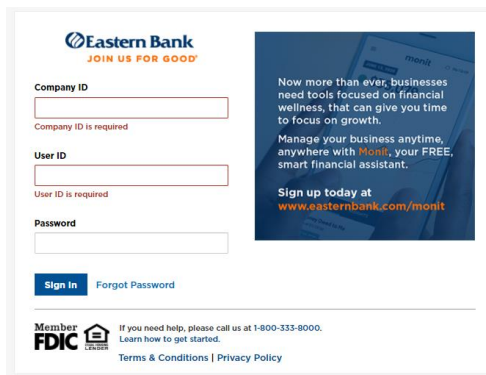
Alert messages are displayed online for 90 days, after which they are archived for three years. Alerts are not automatically deleted.

1. Alerts are delivered to company users within their application mailbox.
2. Company users can also have alerts delivered to their primary and/or secondary e-mail address and/or mobile telephone number.
3. Entitlements determine the alerts available to users.
  - a. Messages are delivered throughout the day depending on the event and when the information is available.
  - b. Mandatory alerts notify company users of important events and cannot be turned off. Mandatory alerts appear with a check mark and cannot be deleted.

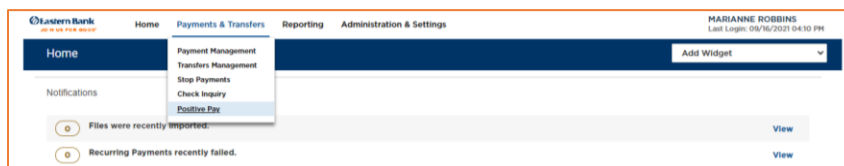
The Manage Alerts page provides a central area for users to manage their alerts and includes three main categories of alerts: Account Alerts, Non-account Alerts and Custom Alerts.

## Log on to Eastern Treasury

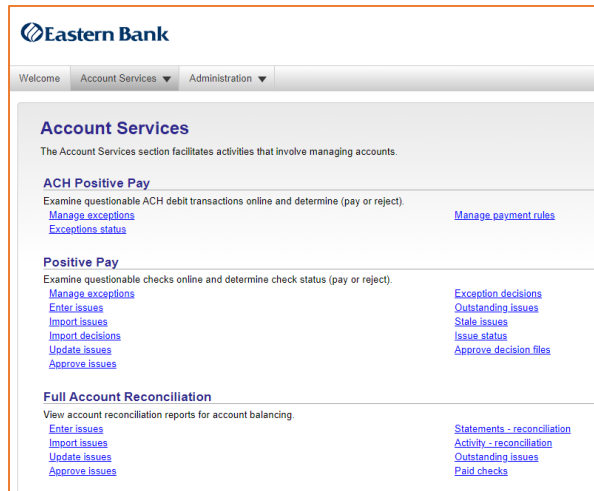
Alerts and Administration are accessed by logging on to Eastern Treasury



- Navigate to and click the **Payments & Transfers** tab, click the **Positive Pay** option



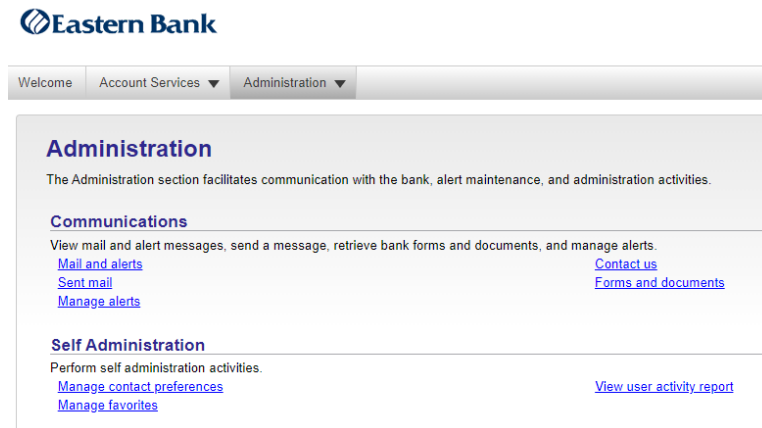
- The **Account Services** default screen will display.



## Administration

The Administration tab consists of two sections:

1. Communications, where Alerts are setup and maintained
2. Self Administration, where email addresses and telephone numbers are setup and maintained



## Setting up and Managing Contact Preferences

### Adding E-mail Addresses

1. Click **Administration > Manage contact preferences**.
2. Click the **email address** link beside the Primary or Secondary e-mail address.
3. In the **Enter primary e-mail address** or **Enter secondary e-mail address** field, type the e-mail address. Up to 100 alphanumeric characters are allowed.

4. Confirm the e-mail address by typing it again into the **Confirm primary e-mail address** or **Confirm secondary e-mail address** field.
5. Click **Save changes**.
6. Click **Save changes**. If your company requires multiple approvals for Administration, the user profile is submitted for approval by other Administrators in your company.

## Changing E-mail Addresses

1. Click **Administration > Manage contact preferences**.
2. Click the **Change this address** link beside the e-mail address you want to change.
3. In the **Enter primary e-mail address** or **Enter secondary e-mail address** field, type the e-mail address. Up to 100 alphanumeric characters are allowed.
4. Confirm the e-mail address by typing it again into the **Confirm primary e-mail address** or **Confirm secondary e-mail address** field.
5. Click **Save changes**.
6. Click **Save changes**. If your company requires multiple approvals for Administration, the user profile is submitted for approval by other Administrators in your company.

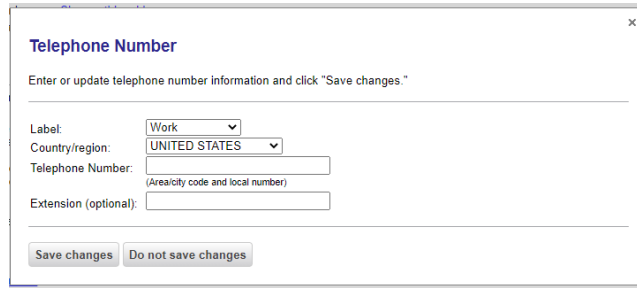
## Adding Telephone Numbers

All users are required to have at least one telephone number, either land line or mobile. Up to six phone numbers are allowed.

1. Click **Administration > Manage contact preferences**.
2. Click the **Add additional telephone number** link. This link does not appear if you already have six telephone numbers defined.
3. Complete the **Telephone** fields and then click **Save changes**:

<b>Label</b>	Home, Work, Work2, Mobile, Mobile2, and Other. Each label can be used once.
	If enabled for your company, domestic mobile telephone numbers can be used to receive alert

notifications. Message and data rates may apply; see your carrier for details.



### Country/region

The numeric country code associated with the telephone number. Select from a list of country names. These are mapped to the appropriate one to three-digit country code.

### Area/city code and local number

The telephone number separated by the one of the following characters: left and right parentheses, hyphen, period, or spaces. Up to 30 characters (digits and separator characters) are allowed.

### Extension (optional)

Required when an extension is needed to reach the user within an office phone system. Up to 16 numeric characters are allowed.

Some phone systems require entry of additional characters, often referred to as control codes, to reach an extension. The following control codes are allowed: Pound (#), Star (\*), Comma (short pause - approximately 2 seconds), Period (long pause - approximately 5 seconds).

Multiple comma and period characters can be placed before or after an extension to add pause time during system generated calls that are made to users for the purpose of validating their information.

For example, ..12345. This example extension has a 10 second pause time before the extension and a 5 second pause time after. During a system generated call, the system waits 10 seconds before dialing the extension and waits 5 seconds after it dials before playing an affirmation message such as "Hello. This is Example Bank. Please press 1 to...".

4. If available, click the **Use with alerts** option beside a mobile phone number so it appears as a delivery option for the alerts that are available for SMS/text message delivery. This option can only be assigned to one mobile device at a time.

**Note:** A welcome message is sent to the selected mobile number after you set up your first alert for SMS/text delivery.

5. Click **Save changes**.

If your company requires multiple approvals for Administration, the user profile is submitted for approval by other Administrators in your company.

## Changing Telephone Numbers

All users are required to have at least one telephone number, either landline or mobile. Users can choose to have up to six phone numbers.

1. Click **Administration > Manage contact preferences**.
2. Click the **Change** link beside the number you want to change.
3. Change the **Telephone** fields as needed and then click **Save changes**:

**Label** Home, Work, Work2, Mobile, Mobile2, and Other. Each label can be used once.

If enabled for your company, domestic mobile telephone numbers can be used to receive alert notifications. Message and data rates may apply; see your carrier for details.

**Country/region** The numeric country code associated with the telephone number. Select from a list of country names. These are mapped to the appropriate one to three-digit country code.

**Area/city code and local number** The telephone number separated by the one of the following characters: left and right parentheses, hyphen, period, or spaces. Up to 30 characters (digits and separator characters) are allowed.

**Extension (optional)** Required when an extension is needed to reach the user within an office phone system. Up to 16 numeric characters are allowed.

Some phone systems require entry of additional characters, often referred to as control codes, to reach an extension. The following control codes are allowed: Pound (#), Star (\*), Comma (short pause - approximately 2 seconds), Period (long pause - approximately 5 seconds).

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For example, ..12345. This example extension has a 10 second pause time before the extension and a 5 second pause time after. During a system generated call, the system waits 10 seconds before dialing the extension and waits 5 seconds after it dials before playing an affirmation message such as "Hello. This is Example Bank. Please press 1 to...".

4. Click the **Use with alerts** option beside a domestic mobile phone number so it appears as a delivery option for the alerts that are available for SMS/text message delivery. This option can only be assigned to one mobile device at a time.

**Note:** *If this option is already assigned to a domestic mobile number and you are reassigning it to a different domestic number, the new number is automatically opted-in and your subscribed text message alerts are updated to reflect the new*

number. If this option is not already assigned to a domestic number, a welcome message is sent to the selected mobile number after you set up your first alert for SMS/text delivery.

5. Click **Save changes**

If your company requires multiple approvals for Administration, the user profile is submitted for approval by other Administrators in your company.

## Deleting Telephone Numbers

1. Click **Administration > Manage contact preferences**.
2. Click the **Delete** link beside the number you want to delete. If the number you delete is the only destination set up to receive mandatory alerts, then your primary e-mail address is automatically set up to receive mandatory alerts after the number is deleted.

**Note:** The *Delete* link does not appear if only one telephone number is set up.

- 2.1 If you selected to delete a mobile number that is set up to receive text message alerts click **Delete number**.
3. Click **Save changes**.

If your company requires multiple approvals for Administration, the user profile is submitted for approval by other Administrators in your company.



## Personal Preferences Page Sample

### Personal preferences

#### E-mail

The primary e-mail address listed below may be used for bank communications such as alerts and electronic statement notifications.

A secondary e-mail address can be added for use as an optional or backup e-mail.

Primary e-mail address: eunice.user@sample.com [Change this address](#)

Secondary e-mail address (optional): eunice.user@sample2.com [Change this address](#)

#### Telephone

The telephone numbers listed below will be used to contact or notify you for security reasons.

Mobile telephone numbers in (xxx) xxx-xxxx format can be used for alert notifications that you select to receive as text messages. Select the mobile number you want to use for text message alerts below. Your alert subscriptions will be updated, and you will receive a welcome message at the selected number. To manage your alert subscriptions, go to [Manage Alerts](#).

If you choose to receive text messages, you are agreeing to the [Text Message Terms and Conditions](#) and our posted [Privacy Policy](#). Messages and Data Rates May Apply, see your Carrier for details. The frequency of text messages will depend on the alerts you choose. You can change your alert selections at any time. Messages can be discontinued by removing your mobile phone number, changing your alert selections, or by sending **STOP** as a reply to an alert message or directly to 20736. Messages will come from your bank as Bank Alerts.

For additional assistance, type **HELP** in response to a message from 20736 or send an email to [sms\\_support@bank.com](mailto:sms_support@bank.com). You can also contact us in Secure email using the Contact us Link on this site.

Telephone numbers : Work: (000) 123-4567 [Change](#) • [Delete](#)

Mobile: (000) 111-2222 [Change](#) • [Delete](#)  Use with alerts

Home: (000) 222-3333 [Change](#) • [Delete](#)

Other: 31 42 123 4567 [Change](#) • [Delete](#)

Mobile 2: (000) 000-0000 [Change](#) • [Delete](#)  Use with alerts

[Add additional telephone number](#)

#### Splash Page Opt Out

Select your preferences for splash page display. Splash pages are displayed after Sign On if specified by your financial institution.

Show informational splash pages

Show marketing splash pages

## Stopping Text Message Delivery from a Mobile Device

1. Reply with stop to any text message alert you receive.

## Re-enrolling a Mobile Device for Text Message Delivery

If you have stopped SMS/text message delivery to your mobile device you can re-enroll it by completing the steps in this task.

1. Delete the mobile phone number.
2. Re-add the mobile phone number.

**Note:** Ensure you select the Use with alerts option when re-adding the domestic mobile phone number. This option can only be assigned to one mobile device at a time.

3. Change your alert subscriptions so that one or more alerts are set up to be delivered to the mobile phone number.

## Supported Telephone Control Codes Information

Telephone control codes can be used for companies that do not allow direct dialing of an extension.

For example, if the phone system plays a message and requires pressing the pound key (#) to reach an extension, you can account for the message and pound key by including the appropriate control codes. The following control codes are allowed:

- Digits 0-9
- Pound (#)
- Star (\*)
- Comma (,) - short pause (about 2 seconds)
- Period (.) - long pause (about 5 seconds)

Control codes are not masked or hidden. Extensions continue to be preceded by the "x" character, with no spaces; example: (414) 286-2489 x,#..00000

## Viewing Activity - Company Users

Company users who have the Administration role can view activity for all users. Company users who do not have the Administration role can only view their own activity.

1. Click **Administration > View user activity report**.
2. Complete the following fields and then click **Generate report**:

<b>Output to</b>	Accept the default <b>Screen</b> option or select <b>CSV file</b> .
<b>Function</b>	Select one or more <b>Function</b> options.  <i><b>Note:</b> Service entitlements determine the functions available for selection.</i>
<b>User ID</b>	<b>All users, Enter user ID, or Specific user.</b>
<b>Date range</b>	<b>Specific date</b> or <b>From/to</b> range.

# ALERTS

## Available Alerts and Descriptions

Account Alerts	Alert Purpose	O = Optional M = Mandatory
Account Reconciliation Statement	Account Reconciliation Statement Report has generated.	O
Account Reconciliation Statement Delay	Account Reconciliation Statement Report is delayed.	M
Check Issue Approval Pending	Check issue requires approval.	O
Positive Pay Exception	Exception item requires attention, received approximately 10:00 am.	O
Positive Pay Exception Reminder	Exception Item reminder hour before close of exception decision window of 2:00 pm.	O
Reverse Positive Pay	Exception item requires attention, received approximately 10:00 am.	O
Reverse Positive Pay Reminder	Exception Item reminder hour before close of exception decision window of 2:00 pm.	O
ACH Positive Pay	Exception item requires attention, first alert is sent at 6:00 am ET. Multiple Alerts may be received due to ACH debits received from ACH Same Day processing.	O
ACH Positive Pay Exception Reminder	Exception Item reminder hour before close of exception decision window of 7:00 pm.	O

Non-Account Alerts	Alert Purpose	O = Optional M = Mandatory
E-mail Address Changed	Users receives when their e-mail address is changed.	M
Help Alert	Automatic response sent to users who request help from their mobile device.	M
Issue File Approval Pending	Issue file requires approval.	O
Issue File Import Completed With Errors	Issue file imported with errors; further action is required.	O
Issue File Import Failed	Issue file import failed because the format is incorrect.	O
Stop/SMS Opt Out	Opt out of receiving text message alerts.	M
Telephone Number Changed	Add or Change a telephone number.	M
Updated User Entitlements	User entitlements have changed.	O
User Profile Activity	User profile has been modified by company administrator.	O
User Profile Approval Pending	Modified user profile requires approval.	O
User Telephone Number Changed	Notifies company administrators when a user changes their telephone number.	O
Welcome/SMS Opt In	Welcome message for company users who opt in for SMS message alerts.	M

## Setting up Alerts

### Adding Account and Non-account Alerts

1. Click **Administration > Manage alerts.**
2. Click the **Account Alerts** or **Non-account Alerts** tab.
3. For account alerts, select an account and click **Go.**
4. Click the **Add** link beside the alert you want to add. The table rows expand, showing the alert description and delivery options.

5. If applicable, enter alert criteria.
6. Click the check box associated with each **Send To** option to which you want the alert sent. The **Send To** column does not appear if an e-mail or mobile telephone (if applicable) is not defined.
7. Click **Add alert** beside the alert subscriptions you want to add. **Please note, all alerts are listed but may not apply.**

### Manage Alerts Page Sample

#### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

If you choose to receive text message alerts, you are agreeing to the [Text Message Terms and Conditions](#) and our posted [Privacy Policy](#). Messages and Data Rates May Apply, see your Carrier for details. The frequency of text messages will depend on the alerts you choose. You can change your alert selections at any time. Messages can be discontinued by removing your mobile phone number, changing your alert selections, or by sending STOP as a reply to an alert message or directly to 20736.

For additional assistance, type HELP in response to a message from 20736 or send an email to [sms\\_support@bank.com](mailto:sms_support@bank.com). You can also contact us in Secure email using the Contact us Link on this site.

Account Alerts
Non-account Alerts
Custom Alerts

Alert	Send To	
<input checked="" type="checkbox"/> New Balance Account	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> <b>E-mail Address Changed</b> <small>Notifies you when your e-mail address is changed.</small>	<input checked="" type="checkbox"/> eunice.user@sample.com <input checked="" type="checkbox"/> (000) 111-2222 (text message)	
<small>This alert is mandatory and cannot be deleted.</small> <div style="float: right;"> <input type="button" value="Save alert"/> <input type="button" value="Do not save alert"/> </div>		
<input checked="" type="checkbox"/> Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Password Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Approval Pending	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Activity	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Updated User Entitlements	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Account Closure	eunice.user@sample.com	<a href="#">Change</a>

## Changing Alerts

1. Click **Administration > Manage alerts**.
2. Click the **Account Alerts**, **Non-account Alerts**, or **Custom Alerts** tab.
3. For account alerts, select an account and click **Go**.
4. Click the **Change** link beside the alert subscription you want to change.
5. If applicable, change the alert criteria and change the **Send to** options as needed.
6. Click **Save alert**.

## Manage Alerts Page Sample

### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

If you choose to receive text message alerts, you are agreeing to the [Text Message Terms and Conditions](#) and our posted [Privacy Policy](#). Messages and Data Rates May Apply, see your Carrier for details. The frequency of text messages will depend on the alerts you choose. You can change your alert selections at any time. Messages can be discontinued by removing your mobile phone number, changing your alert selections, or by sending **STOP** as a reply to an alert message or directly to 20736.

For additional assistance, type **HELP** in response to a message from 20736 or send an email to [sms\\_support@bank.com](mailto:sms_support@bank.com). You can also contact us in Secure email using the Contact us Link on this site.

[Account Alerts](#)   [Non-account Alerts](#)   [Custom Alerts](#)

Alert	Send To	
<input checked="" type="checkbox"/> New Balance Account	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> E-mail Address Changed Notifies you when your e-mail address is changed.	<input checked="" type="checkbox"/> eunice.user@sample.com <input checked="" type="checkbox"/> (000) 111-2222 (text message)	
This alert is mandatory and cannot be deleted.		<a href="#">Save alert</a> <a href="#">Do not save alert</a>
<input checked="" type="checkbox"/> Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Password Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Approval Pending	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Activity	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Updated User Entitlements	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Account Closure	eunice.user@sample.com	<a href="#">Change</a>

## Deleting Alerts

1. Click **Administration > Manage alerts**.
2. Click the **Account Alerts**, **Non-account Alerts**, or **Custom Alerts** tab.
3. For account alerts, select an account and click **Go**.
4. Click the **Delete** link beside the alert subscription you want to stop receiving.
  - 4.1 For custom alerts, a **Delete Custom Alert** page appears after the **Delete** link is clicked. Review the alert as needed and then click **Delete alert**.

## Manage Alerts Page Sample

### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

If you choose to receive text message alerts, you are agreeing to the [Text Message Terms and Conditions](#) and our posted [Privacy Policy](#). Messages and Data Rates May Apply, see your Carrier for details. The frequency of text messages will depend on the alerts you choose. You can change your alert selections at any time. Messages can be discontinued by removing your mobile phone number, changing your alert selections, or by sending **STOP** as a reply to an alert message or directly to 20736.

For additional assistance, type **HELP** in response to a message from 20736 or send an email to [sms\\_support@bank.com](mailto:sms_support@bank.com). You can also contact us in Secure email using the Contact us Link on this site.

Alert	Send To	
<input checked="" type="checkbox"/> New Balance Account	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> E-mail Address Changed Notifies you when your e-mail address is changed.	<input checked="" type="checkbox"/> eunice.user@sample.com <input checked="" type="checkbox"/> (000) 111-2222 (text message)	
This alert is mandatory and cannot be deleted.		<input type="button" value="Save alert"/> <input type="button" value="Do not save alert"/>
<input checked="" type="checkbox"/> Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Telephone Number Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Password Changed	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Approval Pending	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> User Profile Activity	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Updated User Entitlements	eunice.user@sample.com	<a href="#">Change</a>
<input checked="" type="checkbox"/> Account Closure	eunice.user@sample.com	<a href="#">Change</a>

## Reading Received Alert Messages

1. Click **Administration > Mail and alerts**.
2. Click the link in the **Subject** column for alert you want to view.

### User Profile Activity Alert Page Sample

### User Profile Activity Alert

Review alert information, or return to [Received Mail and Alerts](#). To delete this alert, click "Delete alert."

To manage the alerts you receive, go to [Manage Alerts](#).

---

Alert type: User Profile Activity  
User ID: JUSER  
Date triggered: 05/18/2015 12:26:13 PM (ET)

---

The user profile for user Jezebel User was created by Julie User on 05/18/2015 12:26 PM (ET). For more information, contact Customer Support.

---

## Custom Alerts

1. Click **Administration > Manage alerts**.
2. Click the **Custom Alerts** tab.
3. Click the **Add new alert** link.

4. In the **Subject** field, type the subject. Up to 120 alphanumeric characters.
5. In the **Alert message** field, type the message you want to include.
6. Select one or more **Send to** options.
7. Select a **Frequency**:
 

<b>One time</b>	Sends the alert once on a date in the future.
<b>Weekly</b>	Sends the alert on the same day each week. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Every other week</b>	Sends the alert on the same day every other week. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Twice a month - the 15th and last day of the month</b>	Sends the alert on the 15th and last day of the month.
<b>Monthly</b>	Sends the alert on the same date every month. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Monthly - last day of the month</b>	Sends the alert on the last day of each month.
<b>Every three months</b>	Sends the alert on the same day every three months. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Every three months - last day of the month</b>	Sends the alert on the last day of the month, every three months.
<b>Every six months</b>	Sends the alert on same day every six months. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Every six months - last day of the month</b>	Sends the alert on the last day of the month, every six months.
<b>Yearly</b>	Sends the alert on the same date every year. The date provided in the <b>Next send on</b> field determines the day on which the alert is sent.
<b>Custom</b>	Sends the alert on unique <b>Send on</b> dates. At least one date is required but up to 25 custom dates can be scheduled at one time.
8. If applicable, in the **Next send on** field, type the date on which the alert should be sent or click the icon and select a date.
9. If applicable, select an **End on** option:

- Continue indefinitely
- Continue until this date
- Continue for this many occurrences. Specify when you want to stop receiving the alert based on the number of times it is delivered.

10. Click **Add alert**.

### ***Manage Alerts Page Sample***

#### Manage Alerts

Use this page to manage the alerts you receive and how you receive them. You can add new alerts, change existing alerts, or delete non-mandatory alerts. Enabled alerts are always delivered to your online banking mailbox. Available destinations depend upon the contact information you enter in [Personal Preferences](#).

[Account Alerts](#)   [Non-account Alerts](#)   **Custom Alerts**

[Add new alert](#)

Alert	Frequency	Next Send On	Send To
No custom alerts are available at this time.			