



# Alerts

Click an account tile to view details and transaction history. ✕

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## Home 🖨️

### ACCOUNTS ✎ ⤴

Current: \$1,348,173.99 ?

JCDC **8655 Available Balance <b>\$4,966.00</b> Current Balance \$4,966.00	ATM SURCHARGE EXPENSE **8898 Available Balance <b>\$10,016.94</b> Current Balance \$10,016.94
COMMERCIAL CHECKING **7245 Available Balance <b>\$2,952.82</b> Current Balance \$2,952.82	COMMERCIAL HYBRID **7311 Available Balance <b>\$15,957.39</b> Current Balance \$15,957.39
MUNICIPAL COMMER CKG **5122 Available Balance <b>\$4,872.42</b> Current Balance \$4,872.42	MUNICIPAL HYBRID **7152 Available Balance <b>\$5,297.31</b> Current Balance \$5,297.31
NON-PR COMMERC CKG **5537 Available Balance <b>\$4,864.35</b> Current Balance \$4,864.35	INSTITUTIONAL MMKT **6030 Available Balance <b>\$9,996.43</b> Current Balance \$9,996.43
OFFICIAL CHECKS **4572 Available Balance <b>\$10,007.90</b> Current Balance \$10,007.90	NON PR COM CKG W/INT **1995 Available Balance <b>\$4,836.45</b> Current Balance \$4,836.45
WHOLESALE MMKT (FINA... **6454 Available Balance <b>\$5,103.29</b> Current Balance \$5,103.29	FIXED COMMERCIAL 300200 Current Balance \$750,000.00
RLC VARIABLE 200200 Current Balance \$500,000.00	ESCROW BUSINESS MMKT **6356 Available Balance <b>\$4,466.30</b> Current Balance \$4,466.30

Transfer Money Now ➤

You setup **Alerts** under the **Services** menu.

Create and manage alerts for your accounts. Enable/disable security alerts for account activity and edit delivery preferences for receiving alerts. Alerts are not in real time, there may be a delay between when transactions occur and when you receive an alert. ×

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## Alerts

SECURITY ALERTS (37)

**+ New Alert**

- Account Alert
- History Alert
- Online Transaction Alert
- Reminder

Select the desired type of alert from the drop-down **+New Alert** in the top right corner of the screen.

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## New Account Alert

Account

Please select an account to see available fields.

Amount

- More Than
- Less Than
- Exactly

\$  0.00

Alert Delivery Method

- Email
- Voice
- SMS Text Message
- Secure Message

Go back

Create Alert

**Account Alerts** will notify you if an account hits a certain balance. To start, **select an account**.

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## New Account Alert

Account

COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

Account balance type

Available Balance

Current Balance

Year-to-date interest amount

Alert Delivery Method

Email

Voice

SMS Text Message

Secure Message Only

Go back

Create Alert

**Select a field** the alert should reference.

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## New Account Alert

Account

COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

Account balance type

Current Balance

Amount

\$ 5,000.00

Alert Delivery Method

**Select a search criteria and an amount.**

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## New Account Alert

Account

COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

Account balance type

Current Balance

Amount

More Than **Less Than** Exactly

\$ 5,000.00

Alert Delivery Method

Email Voice SMS Text Message Secure Message Only

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Create Alert

**Select a delivery method.**

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## New Account Alert

### Account

COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

### Account balance type

Current Balance

### Amount

More Than

Less Than

Exactly

\$

5,000

### Alert Delivery Method

Email

Voice

SMS Text Message

Secure Message C

### Country

United States

### SMS Text Number

(262) 555-5555

Agree To Terms


Terms and Conditions

You will have to agree to **Terms and Conditions** for SMS alerts



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### SMS Terms and Conditions

There are no fees for using our text alerts; however, message and data rates may apply.

**Close**

Amount

- More Than
- Less Than**
- Exactly

\$ 5,00

Alert Delivery Method

- Email
- Voice
- SMS Text Message**
- Secure Message Only

Country

United States

SMS Text Number

(262) 555-5555

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## New Account Alert

**Account**

COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

**Account balance type**

Current Balance

**Amount**

\$ 5,000.00

**Alert Delivery Method**

**Country**

United States

**SMS Text Number**

(262) 555-5555

Agree To Terms

Terms and Conditions

Click **Create Alert**.

Create and manage alerts for your accounts. Enable/disable security alerts for account activity and edit delivery preferences for receiving alerts. Alerts are not in real time, there may be a delay between when transactions occur and when you receive an alert. ✕

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## Alerts

[+ New Alert](#)

### ACCOUNT ALERTS (1)

When my Current Balance is less than \$5,000.00, send me an SMS text message (2625555555)

COMMERCIAL CHECKING - \*\*\*\*7245

[Edit](#)



### SECURITY ALERTS (37)

[Edit Delivery Preferences](#)

Alert me when an address is changed.

Alert me when an outgoing ACH transaction is created.

Alert me when a recipient is added.

Alert me when a wire transfer is created.

Alert me when an international wire transfer is created.

Alert me when an external transfer is authorized.

Alert me when a computer/browser is successfully registered.



You can turn the alert **on** or **off** with the **slider**.

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## New History Alert

### Transaction Type

Debit Transaction    Credit Transaction    Check Number    Description

### Amount

More Than    Less Than    Exactly

\$

### Account

### Alert Delivery Method

Email    Voice    SMS Text Message    Secure Message Only

Go back    Create Alert

**History Alerts** work in the same way, but let you choose the transaction type you are looking for.

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## New Online Transaction Alert

**Transaction**  
Domestic Wire

**Account**  
COMMERCIAL CHECKING \*\*\*\*7245 \$2,952.82

**Status**  
Processed

Alert Delivery Method

- Email
- Voice
- SMS Text Message
- Secure Message Only

- Go back
- Create Alert**

**Online Transaction Alerts** allow you to select a transaction type and status for a particular account.

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## New Reminder

**Event**  
Birthday

**Select a date**  
11/18/2020

Recurs Every Year

**Message**  
Mickey's Birthday

### Alert Delivery Method

Email    Voice    SMS Text Message    Secure Message Only

### Email Address

email@email.com

Go back    Create Alert

**Reminders** allow you to setup alerts to remind you about a variety of events unrelated to any accounts or transactions.

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## SECURITY ALERTS (37)

Edit Delivery Preferences

Alert me when an address is changed.



Alert me when an outgoing ACH transaction is created.



Alert me when a recipient is added.



Alert me when a wire transfer is created.



Alert me when an international wire transfer is created.

Alert me when an external transfer is authorized.

Alert me when a computer/browser is successfully registered.

Alert me when my password is changed.

Alert me when secure access code contact information is changed.

Alert me when my user ID is changed.



Alert me when a company policy change is approved.



Alert me when my company policy is changed.



Alert me when a company policy change is declined.



**Security Alerts** are listed at the bottom of the Alerts screen. Some alerts are clickable and may be turned on or off. The most critical alerts are mandatory and cannot be turned off. These alerts are greyed out.

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## SECURITY ALERTS (37)

[Edit Delivery Preferences](#)

Alert me when an address is changed.



Alert me when an outgoing ACH transaction is created.



Alert me when a recipient is added.



Alert me when a wire transfer is created.



Alert me when an international wire transfer is created.



Alert me when an external transfer is authorized.

Alert me when a computer/browser is successfully registered.

Alert me when my password is changed.



Alert me when secure access code contact information is changed.



Alert me when my user ID is changed.



Alert me when a company policy change is approved.



Alert me when my company policy is changed.



Alert me when a company policy change is declined.



Click **Edit Delivery Preferences** to modify how and where to receive security alerts.



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## Delivery Preferences

### EMAIL ADDRESS

Email Address

email@email.com

### PHONE NUMBER

Country

United States

Phone Number

### SMS TEXT NUMBER

Message and data rates may apply. Expect 1 message/transaction.

Country

United States

Phone Number

Agree To Terms

Terms and Conditions

Cancel

Save

Update contact information for security alerts on this page. Click **Save** to confirm your updates.

Create and manage alerts for your accounts. Enable/disable security alerts for account activity and edit delivery preferences for receiving alerts. Alerts are not in real time, there may be a delay between when transactions occur and when you receive an alert. ×

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## Alerts

+ New Alert

- Account Alert
- History Alert
- Online Transaction Alert**
- Reminder

### ACCOUNT ALERTS (1)

When my Current Balance is less than \$5,000.00, send me an SMS text message (2625555555)  
*COMMERCIAL CHECKING - \*\*\*\*7245*  
Edit

### SECURITY ALERTS (37)

Edit Delivery Preferences

Alert me when an address is changed.

Alert me when an outgoing ACH transaction is created.

Alert me when a recipient is added.

Alert me when a wire transfer is created.

Alert me when an international wire transfer is created.

Alert me when an external transfer is authorized.

Alert me when a computer/browser is successfully registered.

**If you are entitled to Approve ACH and/or Wire transactions, we suggest you add an alert to let you know when a transaction has been drafted for approval.**

**Click +New Alert and select Online Transaction Alert**

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## New Online Transaction Alert

Transaction

ACH Batch

ACH Collection

ACH Pass Thru

Change of Address

Check Reorder

Domestic Wire

EFTPS

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Create Alert

From the **Transaction** drop down menu, select the Transaction type that you may need to approve.

If approve multiple transaction types, you will have to create an alert for each type.

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## New Online Transaction Alert

Transaction

ACH Batch

Account

- JCDC \*\*\*\*8655 \$4,931.00
- ATM SURCHARGE EXPENSE \*\*\*\*8898 \$10,193.05
- COMMERCIAL CHECKING \*\*\*\*7245 \$3,471.79
- COMMERCIAL HYBRID \*\*\*\*7311 \$15,863.50
- MUNICIPAL COMMERCIAL CKG \*\*\*\*5122 \$4,137.44
- MUNICIPAL HYBRID \*\*\*\*7152 \$5,182.34
- NON-PR COMMERCIAL CKG \*\*\*\*5537 \$4,804.41

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Create Alert

From the **Account** drop down menu, select the Account(s) that you may need to approve.

If approve for multiple accounts, you will need to add an alert for each account.

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## New Online Transaction Alert

Transaction

ACH Batch

Account

COMMERCIAL CHECKING \*\*\*\*7245 \$3,471.79

Status

Authorized

Cancelled

Drafted

Failed

Processed

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Create Alert

From the **Status** drop down menu, select **Drafted**.

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## New Online Transaction Alert

Transaction

ACH Batch

Account

COMMERCIAL CHECKING \*\*\*\*7245 \$3,471.79

Status

Drafted

Alert Delivery Method

- Email
- Voice
- SMS Text Message
- Secure Message Only

Email Address

email@email.com

Go back

Create Alert

Select your **Alert Delivery Method**.

When completed, click **Create Alert**.

# Additional Resources and Support

- For additional resources, including “how-to” guides, please visit our online Client Resources page at:
  - » <https://www.johnsonfinancialgroup.com/client-resources>
- If further support is needed, please call our Treasury Management Support Center at 888.769.3796 or by email at [tmsupport@johnsonfinancialgroup.com](mailto:tmsupport@johnsonfinancialgroup.com).

