



First Horizon BusinessConnectSM

Alerts





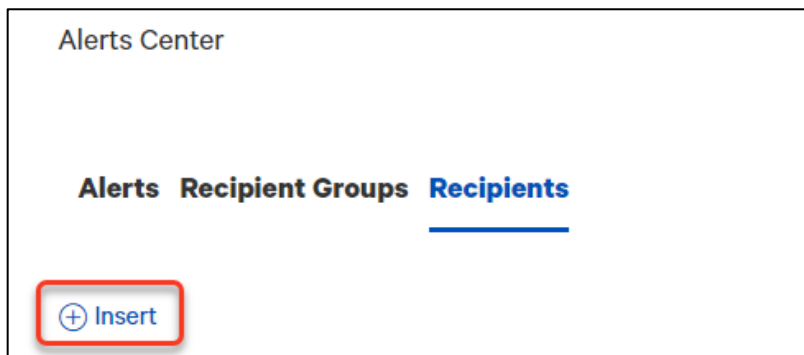
ALERTS

The Alerts widget configures BusinessConnectSM 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.

ADD A RECIPIENT

1. In the Alerts widget, click **Recipients**.
2. Click **Insert**.



Note: The system displays the Recipients screen. It displays the current company name; this cannot be changed.

3. Enter the **Name** of the recipient.
4. Enter the **Email Address** of the recipient.
5. Click **Add Another Contact Method** to enter a phone number to receive a text or another email address.
6. Click **Save**.



ADD AN ALERT

1. In the Alerts widget, click **Alerts** (if not currently on this tab).
2. Click Add New Alert.

Alerts Center

Alerts Recipient Groups Recipients

[+ Add New Alert](#)

08/04/2021 02:54 PM

Filter

<input type="checkbox"/> All	Actions	Alert Name	Alert Group	Alert Type	Alert Subject Line	Recipient	Time Zone
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3. In the **Alert Name** field, enter a Name for the alert.
4. From the **Alert Group** drop-down list, select the appropriate group for this alert.
 - a. Information Reporting
 - b. Payments and Transfers
 - c. Check Management
 - d. Administration
5. In the **Alert Type** field, select the type. For example, if you chose the Payments alert group, you might choose *Processed* as the alert type.
 - a. Processed
 - b. Templates Awaiting My Approval
 - c. Payments Awaiting My Approval
 - d. Approver Rejected
 - e. Rejected Today
 - f. Approval Window Passed
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.
8. Use the **Recipients/Recipient Groups** drop-down to select a recipient or recipient group. You can select one or more recipients OR one recipient group.

* Alert Name

* Alert Group

* Alert Type

* Alert Subject Line

You may change this subject line that appears on the email alert

* Recipients/Recipient Groups

Note: You may add additional recipients to this alert, but not a recipient group. Both recipients and recipient groups cannot be added at the same time.

9. In the **Contact Methods** section, check the checkbox(es) for the appropriate contact method or methods.
10. 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.



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

Contact Methods

☒ All Emails

Test Test

☒ test@firsthorizon.com

*** Payment Status**

Confirmed by Bank ✖

Payment Type

Transfer ✖

Debit Amount

Is equal to ▼

100.00

Credit Amount

Is equal to ▼

100.00

Save

Cancel

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



SET REAL-TIME/IMMEDIATE ALERTS

Some Payment and Transfer alerts can be set so that they are sent in real time or near real time, as soon as the triggering event, such as the creation of a payment requiring approval, occurs. This option is especially useful for clients that produce a large volume of wire payments and want notification when groups, rather than individual payments, are ready for approval.

The following alert types can be set for immediate (real-time) alert delivery:

- Payments Awaiting My Approval
- Templates Awaiting My Approval
- Approval Window Passed

1. In Alert Timing, click **Immediate**.
2. Enter **Contact Methods**.
3. Click **Save**.

* Alert Name

Test

* Alert Group

Payments and Transfers

* Alert Type

Payments Awaiting My Approval

* Alert Subject Line

You Have Payments and/or Transfers Awaiting Approval

You may change this subject line that appears on the email alert

* Alert Timing

☒ Immediate ☐ Set alert timing

* Recipients/Recipient Groups ⓘ

Test Test - test@firsthorizon.com

Note: You may add additional recipients to this alert, but not a recipient group. Both recipients and recipient groups cannot be added at the same time.



SET PAYMENT ALERTS FOR INTERVALS

1. In the **Alert Type** field, select one of the types that allow immediate alerts, for example, *Payments Awaiting My Approval*.
2. In the Alert Timing area, click the **Set Alert Timing**.
3. Select **Schedule Hours** from the drop down.
4. Select **Schedule Minutes** from the drop down.
5. Select **Time Zone**.

* Alert Name

Test

* Alert Group

Payments and Transfers

* Alert Type

Payments Awaiting My Approval

* Alert Subject Line

You Have Payments and/or Transfers Awaiting Approval

You may change this subject line that appears on the email alert

* Alert Timing

Immediate

Set alert timing

* Schedule Hours

01

* Schedule Minutes

--Select--

* Time Zone

EST US/Eastern - US/Eastern

The timezone selected will only impact when the alert is sent, not what timezone is used in the email.

* Recipients/Recipient Groups ⓘ

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Note: You may add additional recipients to this alert, but not a recipient group. Both recipients and recipient groups cannot be added at the same

6. Enter the Contact Methods.
7. Click **Save**.

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