
eAlerts



INTRODUCTION

This booklet covers an overview of eAlerts, a helpful self-service tool your members are sure to appreciate! Included is a discussion of the timing of the different eAlerts, how to activate eAlerts at your credit union, what the members see in online banking and how to assist the member in setting up an eAlert in CU*BASE.

CONTENTS

EALERTS	2
OVERVIEW: ACTIVATING EALERTS	2
TIMING: WHEN EALERTS ARE GENERATED	3
WHY DIDN'T A MEMBER RECEIVE AN EMAIL /EMAIL NOTIFICATION	3
WRONG EMAIL ADDRESS HANDLING	3
HANDLING SPAM ALERTS FROM MEMBERS	4
SPAM ALERTS FROM YOUR OWN EMAIL PROVIDER	5
WHAT THE MEMBER RECEIVES	6
ONLINE BANKING MESSAGES	6
EMAIL "LONG" VERSION AND NOTIFICATION	7
TEXT ALERT	8
MEMBERS SET UP EALERTS ONLINE	9
WHAT ABOUT OTHER TYPES OF EALERTS? – ENOTICES	13
ENROLLING IN EALERTS/ENOTICES ON YOUR PHONE	14
SETTING UP AND MONITORING EALERTS IN CU*BASE	15
SPECIAL INSTRUCTIONS FOR SELF PROCESSING CREDIT UNIONS	20
NTALERTS SUBSYSTEM	20
MEMBER COMMUNICATIONS MENU	20
SETTING YOUR MONITORING TIMEFRAME	21
CONFIGURATION CHANGE FOR YOUR TRAINING LIBRARY	21

Revision date: November 18, 2016

For an updated copy of this booklet, check out the Reference Materials page of our website:
<http://www.cuanswers.com/resources/doc/cubase-reference>
CU*BASE® is a registered trademark of CU*Answers, Inc.

EALERTS

OVERVIEW: ACTIVATING EALERTS

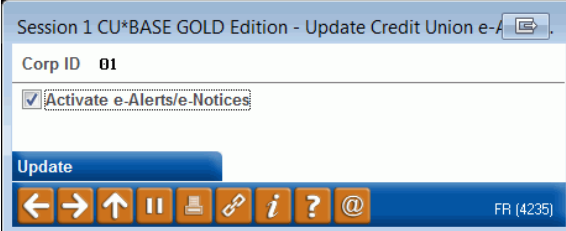
eAlerts allow members to request electronic alerts when account balances get to a certain level, when ACH items are posted, when loan payments are coming due, or when an eNotice is generated. With eAlerts, you can now respond automatically to members who want you to...

- ◆ *Tell me when I have enough money in my savings account to buy a CD!*
- ◆ *Let me know when my checking account is getting low so I can make a transfer from savings!*
- ◆ *Let me know when my paycheck comes in!*
- ◆ *Tell me when deductions are made from my account via ACH!*
- ◆ *Remind me a week before my loan payment comes due so I can transfer funds or mail in a check!*
- ◆ *Send me notices from the credit union in an electronic format, so I can get this information faster than regular mail!*

When subscribing for an eAlert, a member can elect to have the alert delivered just to the Message Center, or they can choose to have a message also sent to them via email. The email can be just a generic “check your Message Center in **It’s Me 247**” note or the member can select the “long” email option which gives them more complete details (without disclosing any personal information of course!). A member can request as many different eAlerts on as many different accounts as they wish.

To activate eAlerts for your members, select *e-Alerts/e-Notices* from the screen accessed via **Online/Mobile Banking VMS Config** on the Internet Member Services Config (MNCNFE) menu.

“Online/Mobile Banking VMS Config” on the Internet Member Services Config (MNCNFE) menu, then e-Alerts/e-Notices



Session 1 CU*BASE GOLD Edition - Update Credit Union e-Alerts/e-Notices

Corp ID 01

Activate e-Alerts/e-Notices

Update

Navigation icons: back, forward, up, down, print, refresh, help, search. FR (4235)

Once this flag is checked, members will see the option to set up eAlerts under the My Messages section in **It’s Me 247**.

TIMING: WHEN eALERTS ARE GENERATED

The timing for when eAlerts will be generated depends on the alert type.

<i>Alert Type</i>	<i>Generated</i>
Account Balance	Accounts requesting a balance alert are evaluated on a 30 minute* cycle. <ul style="list-style-type: none">• This eAlert is based on the member's available balance, not current balance. CU*BASE takes the current balance and subtracts any funds not available to the member, for example holds or secured funds, in order to determine the available balance.• Multiple eAlerts may be sent within a 24 hour time period if the available balance changes and still exceeds the eAlert threshold. If the available balance remains unchanged at that level, the system will wait 24 hours before sending another eAlert.
Loan Payment Due	During end-of-day processing. NOTE: This is sent even if the loan balance is zero (for example with line of credit accounts).
ACH Transaction	When ACH transactions are posted to member accounts.
eNotice	(Considered an eAlert by the system.) When notices are printed. <ul style="list-style-type: none">• NOTE: Members can only receive the email notifications of eNotices; they cannot receive the "long" version of the eNotice in email form. Members will need to login to online banking and read the text of their eNotice in their Secure Online Banking Message Center.

*NOTE: 30 minutes is the designated interval currently being used for online clients. Self Processing credit unions and other data centers may choose a different interval depending on system resources. See Page 21 for more details.

WHY DIDN'T A MEMBER RECEIVE AN EMAIL /EMAIL NOTIFICATION

Members can sign up to receive emails or email notifications for their eAlerts or eNotices. This requires that the member have a valid email address in the system (or that the member supplies an email address). The systems will cease sending email notifications if this address is later deleted from the system or if the email is marked as an invalid email.

Additionally, refer to the sections on handling spam emails following.

WRONG EMAIL ADDRESS HANDLING

Starting in 2012 with the 12.2 release, CU*Answers began running a new daily routine. Invalid email addresses are collected by the system throughout the day. Then during BOD processing, CU*BASE marks each email address as a wrong email address and records a Tracker conversation with the name of the operator who ran BOD. An email address is marked as being a wrong email address only if it is returned with a "fatal" error. If the

system receives a non-fatal error, such as a bounce-back due to a mailbox being full or an “out of office” email, CU*BASE will not mark this address as being invalid.

[Learn more in the Answer Book.](#)

- **NOTE:** If an email is a wrong email address, you can also mark it as an incorrect email address yourself in CU*BASE using the Wrong Email flag which you can access through the Name/Address screen through Teller, Phone Operator and Inquiry or through email maintenance via **Member Personal Banker** on the Member Service (MNSERV) menu. That way no additional communications will be sent to this address. Credit union employees can turn this flag off when the member provides a correct address. The member will be alerted in Online Banking that they need to update their address as well.

HANDLING SPAM ALERTS FROM MEMBERS

Because of the way our system will send a batch of email messages to a large group of members at the same time, there may be some Internet Service Providers that interpret these email messages as “spam” (junk email) messages, especially if you have a large number of members who use the same ISP. If you hear from members that your emails are being marked as spam, here’s what you should do:

1. **Make sure that your credit union email address is correct in CU*BASE.** The “from” address is taken from **Config CU FROM Email Address** on the Internet Member Services (MNCNFE) menu. Ensure that the *Credit Union General Email Address* is the address you want to use with your eStatement notifications.
2. **Ask the member for the name and a contact number for their ISP. Also request a copy of the email message that the member received with “spam” notification on it.** Explain to the member that the ISP probably has a standard scanning software that assumes the email was spam because it was sent as part of a batch of email messages from your credit union.

*In order to prevent members from seeing another member’s email address, all addresses on emails sent by CU*BASE will use the “BCC” (blind carbon copy) address field. This can sometimes be interpreted as spam by ISPs but is in fact the best way to protect member privacy and prevent viruses from being propagated between email boxes.*

3. **Contact the ISP and request that these email messages be excluded from spam detection software.** If appropriate, the member can even contact the ISP directly. Otherwise, contact CU*Answers for assistance in working with the ISP and providing any information they need to exclude these messages. **DO NOT have members contact CU*Answers under any circumstances.**

SPAM ALERTS FROM YOUR OWN EMAIL PROVIDER

The “from” address for all your outgoing emails will be taken from **Config CU FROM Email Address** on the Internet Member Services (MNCNFE), then *Credit Union General Email Address*. Any replies to the message, or any notifications of “invalid address,” will be sent to this email box. This must be a valid email address, and this account should have adequate capacity to handle the potential traffic generated by the message. (For example, if you plan to send an email to 1,000 members, the email box should be able to handle up to 1,000 replies!)

IMPORTANT: Be sure your email provider is aware of the volume of emails you may receive, and does not misinterpret your email traffic as spam. It is recommended that you establish a relationship with a provider who understands your credit union and its email marketing needs. Some providers, such as AOL, have restrictions in place to prevent people from signing up for an email box and then using it to send junk messages to a large number of email addresses. Be sure your email provider does not misunderstand your intentions.

Remember that the cleaner and more up-to-date your email address list is, the less likely you are to receive a large number of returned emails. Remind your members to keep you in the loop when they change

WHAT THE MEMBER RECEIVES

The member can elect to receive several different forms of communication to alert them of changes to their accounts.

ONLINE BANKING MESSAGES

eAlerts are sent to the member's Secure Online Banking Message Center. The member logs on to Online Banking to view this message. Below is an example of an online banking eAlert message.

As eAlerts are generated by CU*BASE, they are sent to the **It's Me 247 Secure Message Center**. The envelope icon at the top of each page in **It's Me 247** takes the member to the Secure Message Center where the member can read eAlerts that are delivered.

The screenshot shows the 'Message Center' interface. At the top, there are navigation links: 'Info Center', 'My Accounts', 'New Accounts', 'Pay Bills', 'eStatements', 'MoneyDesktop', 'Go Mobile', and 'Contact Us'. On the left sidebar, there is a 'Live Chat' button and account information for 'Mary S Member' (VIP-PLATINUM Member, 30,030 Reward Points). The main content area is titled 'Message Center' and includes a 'Filter Messages' dropdown set to 'Unread Messages' and a 'Next' button. Below this is a table of messages:

	Subject	Date
	Personal Information Change	01/08/2013
	Password Change Notification	01/08/2013

eAlert Online Banking Message

The screenshot shows the 'Message Details' page for an eAlert. At the top, there is a security warning: 'YOU DON'T NEED TO HIDE KEEP YOUR INFO UP TO DATE'. The navigation bar is the same as in the previous screenshot. The left sidebar shows account information for 'Mary S Member' (VIP-PLATINUM Member, 3,960 Reward Points, Earned Last Month 390). The main content area is titled 'Message Details' and includes 'Back' and 'Delete' buttons. The message details are as follows:

Date: 10/02/2012 Time: 12:26:47 PM Account: 110 - INT PLUS CHECKI

Subject: Account Balance eAlert

The available balance in your 110 INT PLUS CHECKI was above \$6.00 at 12:26 PM ET on 10/02/2012.

This message will be automatically deleted 30 days from when it was read.

EMAIL “LONG” VERSION AND NOTIFICATION

Members can select from the “Long email” with more complete information of the details of the eAlert, or simply a short email notification (that instructs them to log onto online banking to view the complete details).

Following is an example of what the member will receive in email form if they select to receive the “full” email notification. This example is for a balance notification. Notice how the balance threshold amount, sub account, nickname, and time are included. This is similar to the information provided in the online banking message.

Long Email

Subject: Account Balance eAlert

The available balance in your 003 XTRACASH SAVINGS was above \$5,000.00 at 11:02 AM ET on 03/08/2011.

This eAlert is being sent at your request. If you do not wish to continue receiving these alerts, log in to online banking as usual and click "My Messages" then "eAlert Subscriptions."

ABC Credit Union
123-456-7890
www.abccu.org
Connecting to you is important to us. Should you like to unsubscribe please visit <http://memberreach.com/unsubscribe>

Although the longer version is more complete, it does not include any personal details of the member or the membership number, similar to the online banking message shown above. As with the online banking message previously, the member is only presented with the account suffix and nickname of the affected account. For this reason, credit unions offering eAlerts should also consider activating the Nicknames feature in online banking. This allows the member to create a “nickname” for each account for identification.

- NOTE: If the member enrolls in the “long” email option, the corresponding online banking message will be set to the “Read” setting (as if the member had opened the message and read it in online banking). After 30 days all “Read” online banking messages are automatically deleted by the system.

The example below is what the member will receive in email form if they select to receive an email notification only. Notice how this version only tells the member that they have received an Account Balance eAlert, but does not show the details provided in the longer version shown previously.

Short Email Notification

Subject: eAlert Notification

On 3/08/2011 an Account Balance eAlert was sent to your secure online banking message center. To view this alert, log in to online banking as usual and click the "My Messages" button. Please contact your credit union if you cannot locate your eAlert.

ABC Credit Union
123-345-5678
www.abccu.org

Connecting to you is important to us. Should you like to unsubscribe please visit <http://memberreach.com/unsubscribe>

Why Didn't a Member Receive an Email?

Members can sign up to receive email notifications or "long" emails along with the eAlert. This requires that the member have a valid email address in the system (or that the member supplies an email address). The systems will cease sending emails (notifications or "long" emails) if this address is later deleted from the system or if the email is marked as an invalid email.

TEXT ALERT

Members enrolled in Text Banking can receive one-way eAlerts sent to their enrolled mobile phone. Text Banking is an optional offering that a credit union must activate in order to offer Text Alerts. Members who wish to receive text alerts then must enroll in Text Banking and agree to the text banking fees charged by the credit union for this service. For more information on Text Banking, refer to the *Text Banking* booklet, available on the CU*BASE Reference Page.

MEMBERS SET UP eALERTS ONLINE

To access the set-up, members click **eAlert Subscriptions** in the Info Center section.

First the member selects the type of eAlert. Then the member fills in the conditions for the eAlert and clicks Add. Email notifications require a valid email address – a space is available at the bottom of the screen for the member to enter one.

The screenshot shows the 'eAlert Subscriptions' page in the Success Credit Union online banking interface. The page title is 'eAlert Subscriptions'. Below the title, there is a paragraph of instructions: 'The following are eAlert subscriptions currently setup for your account. Click on "Create new subscription" to setup a new eAlert. Click "Edit" to modify an existing subscription. Click "Delete" to unsubscribe from the eAlert. eAlerts will always appear in your Secure Message Center.'

Below the instructions is a table titled 'Your Current eAlerts:' with the following data:

		Type	Account
Edit	Delete	eNotices	All Accounts
Edit	Delete	Account Balance	050 - VACATION SAVING
Edit	Delete	ACH	110 - CHECKING
Edit	Delete	Loan Payment Due	606 - NEW VEHICLE LOA

Below the table, there is a paragraph: 'The following are eAlert messages you may subscribe to, please select the type you wish to create:' followed by three buttons:

- Create new Account Balance eAlert subscription.
- Create new ACH Deposit or Withdrawal eAlert subscription.
- Create new Loan Due eAlert subscription.

Account Balance eAlert

This member is enrolled in Text Banking, so the member can select to receive alerts in the form of a one-way text. Credit union configured charges apply for each text the member receives.

Account Balance eAlert

Send an eAlert message at the end of each business day when my account balance is above or below the threshold

Step 1 - Choose account for eAlert

Account:
000 - REGULAR SAVINGS

Step 2 - Enter account balances

Send an eAlert when my account balance is above:
\$ 0 Max: 99,999.99

Send an eAlert when my account balance is below:
\$ 0 Max: 99,999.99

Step 3 - Select where you receive your eAlert

Only to Secure Message Center
 Secure Message Center with email reminder
 Send the complete alert via email only
 Send a message to my mobile device(s)

Step 4 - Enter your email address

Email Address
tes@gmail.com

Step 5 - Complete eAlert subscription

Add Cancel

- For more information about Mobile Text Banking, refer to the booklet *Mobile Text Banking* on the Reference Page under “M.”
http://www.cuanswers.com/pdf/cb_ref/mobile_text_banking.pdf

ACH Deposit or Withdrawal eAlert

This member is not enrolled in Text Banking, so the member is encouraged to sign up for this service. Credit union configured charges apply for each text the member receives.

My Account

Switch Account

Rewards

VIP-PLATINUM Member
Reward Points 29,550
Earned Last Month 630
View Point Details

Messages

Messages 1

Members

Latest News

SEE WHAT'S UP
Visit the Online Community

ACH Deposit or Withdrawal

Send an eAlert message when an automatic deposit or withdrawal occurs.

Step 1 - Choose account for eAlert

Account:
000 - REGULAR SAVINGS

Step 2 - Select deposit, withdrawal or both for the eAlert

Send an eAlert when an ACH deposit occurs
 Send an eAlert when an ACH withdrawal occurs

Step 3 - Select where you receive your eAlert

Only to Secure Message Center
 Secure Message Center with email reminder
 Send the complete alert via email only

Send a message to my mobile device(s)
 Text Banking is required to send alerts to mobile devices...Sign up here!

Step 4 - Enter your email address

Email address
kirk. @cuanswers.com

Step 5 - Complete eAlert subscription

Add Cancel

Loan Payment Due eAlert

My Account

Switch Account

Rewards

VIP-PLATINUM Member
Reward Points 3,960
Earned Last Month 390
View Point Details

Messages

Messages 4786

Members

Latest News

SEE WHAT'S UP
Visit the Online Community

Loan Payment Due eAlert

Send an eAlert message at the end of the business day to remind me when my loan payment is coming due.

Step 1 - Choose account for eAlert

Loan Account:
610 - USED VEHICLE LO

Step 2 - Enter number of days for reminder

Days prior to payment due date for reminder:

Step 3 - Select where you receive your eAlert

Only to Secure Message Center
 Secure Message Center with email reminder
 Send the complete alert via email only
 Send a message to my mobile device(s)

Step 4 - Enter your email address

Email Address
tersl@gmail.com

Step 5 - Complete eAlert subscription

Add Cancel

eNotice eAlert

Home Settings Mail Print Info E-ALERT SUBSCRIPTION | I'M A VIP-GOLD MEMBER

Update an eAlert Subscription

Account eNotices

Don't be stuck waiting for mail to arrive, get critical information about your accounts fast and more securely with eNotices!

By signing up for eNotices, any periodic notices that the credit union would normally send to you will no longer be mailed via the U.S. Postal Service. Instead, you'll receive the notice in the It's Me 24/7 secure Message Center (just click 'My Messages'). You can also choose to receive an email notifying you that the eNotice has been generated.

Step 1 - Subscribe to eNotices

Send me an eNotice rather than a printed notice

Step 2 - Select where you receive your eNotices

Only to Secure Message Center

Secure Message Center with email reminder

Send a message to my mobile device(s)

Text Banking is required to send alerts to mobile devices...

If the member selects the Text option for eNotices, the member will only receive a text that there is an eNotice in the members Secure Message Center. The eNotices will not be included in the text message.

WHAT ABOUT OTHER TYPES OF EALERTS? – ENOTICES

Besides the balance, ACH deposit or withdrawal or loan payment due eAlert, members can also be notified of changes to their account through eNotices. This is an electronic alternative to the paper notice. Enrollment in eNotices is covered in the previous section, but it is important to note that this will allow you to communicate other changes to a member's account, such as **Delinquent Payment Reminders** and **CD Maturity Notices**.

Members can receive emails and text alerts that they have an eNotice and the title of the eNotice is included in the email or text alert. To read the full notice, members must log onto the full online banking site and read the notice in the Secure Message Center. (This is due to the sensitive information included in the eNotice.)

Example of an eNotice

The screenshot displays a web application interface with a top navigation bar containing links: Info Center, My Accounts, New Accounts, Pay Bills, eStatements, MoneyDesktop, Go Mobile, and Contact Us. On the left side, there is a vertical menu with sections: Live Chat (with a speech bubble icon and text 'We're here to help!'), My Account (with a user icon), Switch Account (with a dropdown arrow), Rewards (with a double arrow icon), VIP-PLATINUM Member (with a red star icon), Reward Points (3,960) and Earned Last Month (390), View Point Details (with a red star icon), Messages (with an envelope icon), Messages (4784), Members (with a group icon), Latest News (with a newspaper icon and 'NEWS' text), and CU*SECURE Updates & Tips (with a padlock icon). The main content area is titled 'eNotice Details' and features three buttons: 'Back' (green), 'Pay now' (red), and 'Delete' (orange). Below these buttons, the notice details are displayed in a table-like format:

Date:	11/07/2012	Time:	01:35:45 AM
Subject: Delinquent Payment Reminder			
Account Number: XXXXX-693			
Date Opened: 11/15/11			
Current Balance: \$456.91			
Payment Amount: \$15.00			
Last Payment Date: 09/28/12			
Last Payment Amount: \$15.00			
Amount Delinquent: \$15.00			
Delinquent Months:			
Next Payment Date: 10/28/12			
Delinquent Days: 10			
Interest Due: \$6.80			
Fine Amount: \$0.00			

For more information on eNotices and a full list of eNotices available, refer to the Member Notices: Configuring and Printing CU Defined Notices and eNotices: http://www.cuanswers.com/pdf/cb_ref/Notices.pdf

ENROLLING IN eALERTS/ENOTICES ON YOUR PHONE

Members can also enroll in eAlerts on their phones or other mobile devices in Mobile Web Banking, which is the banking interface used by the FREE CU*Answers Mobile App. (This follows the same configuration settings and permissions that are used for **It's Me 247**.)

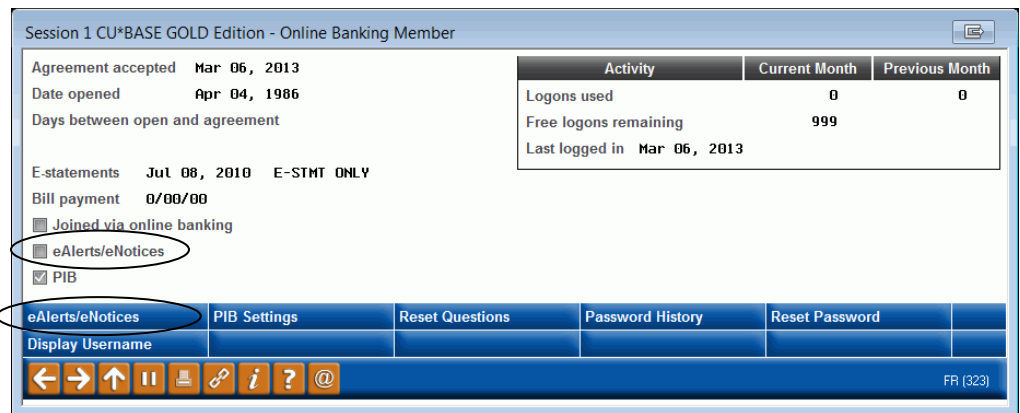


SETTING UP AND MONITORING EALERTS IN CU*BASE

Although members can set up their own eAlert subscriptions in **It's Me 247** (shown in the following section), credit union staff can also assist members in setting up, modifying, or even deleting eAlert subscriptions on their accounts. Additionally, an MSR can read the actual alert that was delivered to the member.

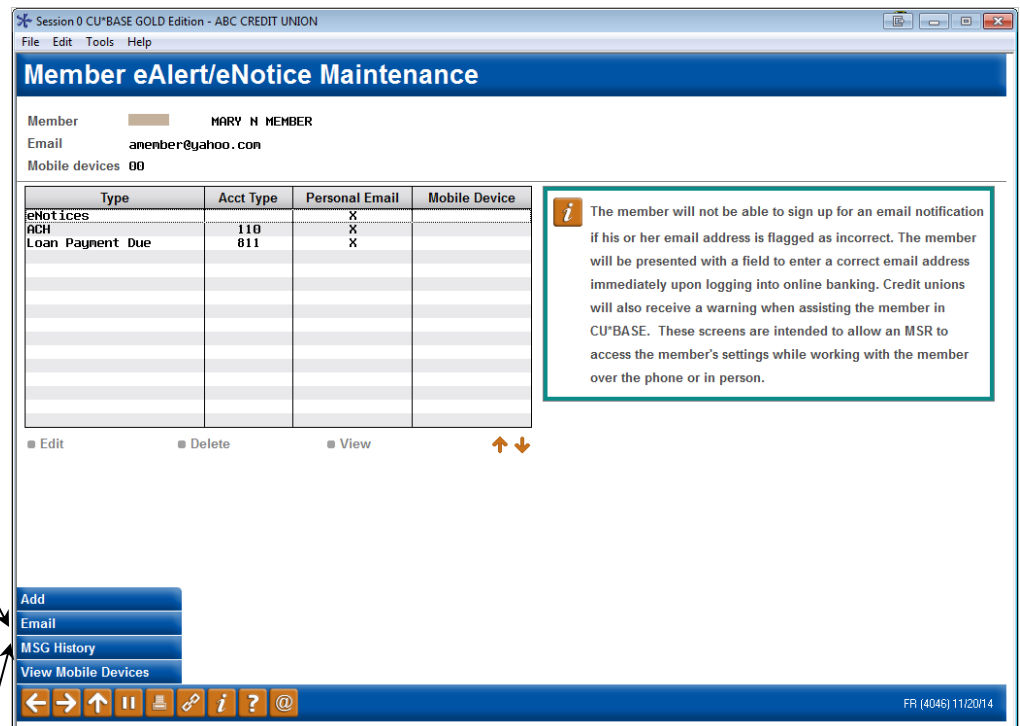
Inquiry, Phone Operator, and Teller Funds In

From the Inquiry, Phone Operator, or Teller Funds In screen, employees can click the Online Banking button to display the Online Banking window:



Notice the checkbox on the right side of the window showing that at least one eAlert has been set up for this member. (This includes eNotices.) To view the configured eAlerts or to create new ones, use *eAlerts/eNotices* (F9).

eAlert Maintenance




Use *Email* (F9) to view or modify the member's email address (helpful if the member says he never received the email he was supposed to get!)

Use *MSG History* (F10) to see the actual eAlerts that were delivered to the member in the **It's Me 247** Secure Message Center.

Select an existing alert to Edit or View it, or use *Add* (F6) to create a new one.

Adding a New eAlert

For the first three alert types, enter an account suffix or click the lookup button  to choose from a list of this member's accounts. For the *eNotice* type, simply check the eNotice checkbox and use Enter to proceed.

For more information on eNotices, check out the booklet "Member Notices: Configuring and Printing CU-Defined Notices. Look in the eNotices section in this booklet: http://www.cuanswers.com/pdf/cb_ref/Notices.pdf

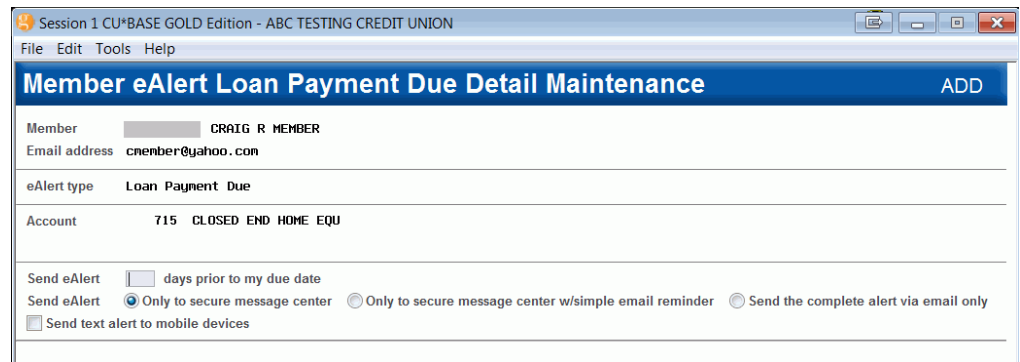
Following are samples of the different screens that will appear depending on what type of eAlert subscription is being set up:

eAlert Detail: Account Balance

The text alert option is only available if the member is enrolled in Text Banking. If the member is not enrolled, you will receive a warning that this option cannot be selected.

- NOTE: If a member wishes to receive Text Alerts, the member must first enroll in Text Alerts online.

eAlert Detail: Loan Payment Due



Session 1 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Member eAlert Loan Payment Due Detail Maintenance ADD

Member CRAIG R MEMBER
Email address cmember@yahoo.com

eAlert type Loan Payment Due

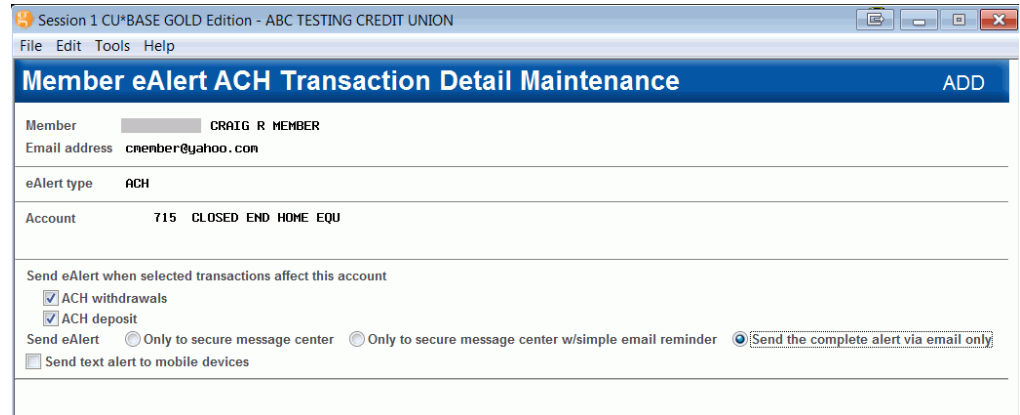
Account 715 CLOSED END HOME EQU

Send eAlert days prior to my due date

Send eAlert Only to secure message center Only to secure message center w/simple email reminder Send the complete alert via email only

Send text alert to mobile devices

eAlert Detail: ACH Transaction



Session 1 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Member eAlert ACH Transaction Detail Maintenance ADD

Member CRAIG R MEMBER
Email address cmember@yahoo.com

eAlert type ACH

Account 715 CLOSED END HOME EQU

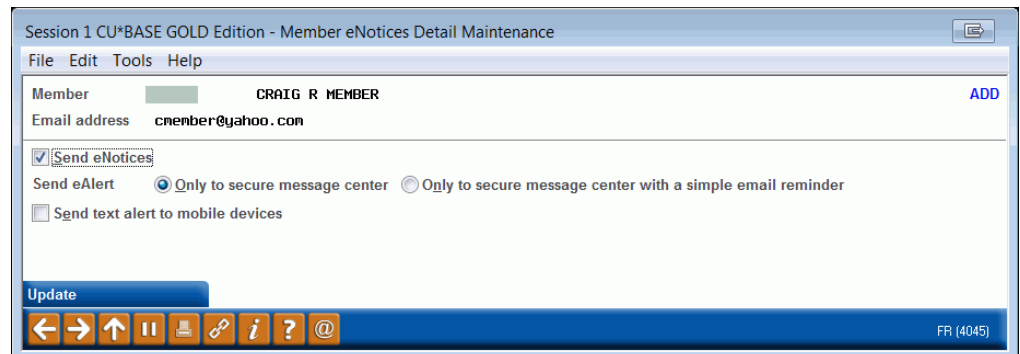
Send eAlert when selected transactions affect this account

ACH withdrawals
 ACH deposit

Send eAlert Only to secure message center Only to secure message center w/simple email reminder Send the complete alert via email only

Send text alert to mobile devices

eNotice



Session 1 CU*BASE GOLD Edition - Member eNotices Detail Maintenance

File Edit Tools Help

Member CRAIG R MEMBER ADD
Email address cmember@yahoo.com

Send eNotices

Send eAlert Only to secure message center Only to secure message center with a simple email reminder

Send text alert to mobile devices

Update

FR (4045)

You must use *Update* (F5) to save any changes and return to the main eAlert Maintenance screen.

NOTE on Filenames:

SMMBRMHD – contains the eAlert Header record.

SMMBRMDT – contains the eAlert message detail.

SMNOTEHD contains the eNotice Header records.

SMNOTEDT contains the eNotice message detail.

TXTMBRHD – contains the text alert header record.

TXTMBRDT – contains the text alert message detail.

eAlerts History

Session 0 CU*BASE GOLD - ABC CREDIT UNION
File Edit Tools Help

Message Center History

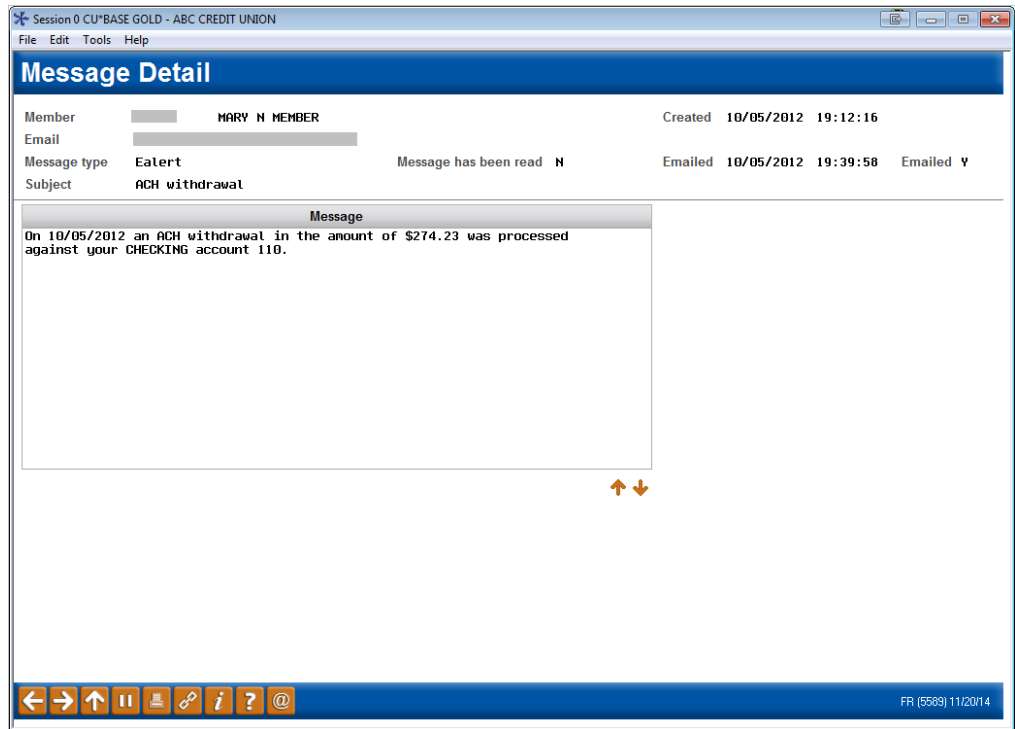
Member MARY N MEMBER
 Message type Create date: From [MMDDYYYY] To [MMDDYYYY]
 Messages: Read Yes No Both Emailed Yes No Both
 Subject contains

Created	Read	Emailed	Message Type	Message Subject
7/26/2010	N	Y	Ealert	ACH withdrawal
7/22/2010	N	Y	Ealert	ACH withdrawal
7/19/2010	N	Y	Ealert	ACH withdrawal
7/16/2010	N	Y	Ealert	ACH withdrawal
7/12/2010	N	Y	Ealert	Loan Payment Due eAlert
7/10/2010	N	Y	Ealert	Loan Payment Due eAlert
7/08/2010	N	Y	ENotice	Delinquent Payment Reminder
7/08/2010	N	Y	Ealert	Loan Payment Due eAlert
7/06/2010	N	Y	Ealert	Loan Payment Due eAlert
7/04/2010	N	Y	Ealert	Loan Payment Due eAlert
7/02/2010	N	Y	Ealert	ACH withdrawal
7/02/2010	N	Y	Ealert	Loan Payment Due eAlert
6/30/2010	N	Y	Ealert	Loan Payment Due eAlert
6/28/2010	N	Y	Ealert	Loan Payment Due eAlert
6/26/2010	N	Y	Ealert	Loan Payment Due eAlert
6/22/2010	N	Y	Ealert	ACH withdrawal
6/18/2010	N	Y	Ealert	ACH withdrawal
6/17/2010	N	Y	Ealert	ACH withdrawal
6/04/2010	N	Y	Ealert	ACH withdrawal

Select ↑ ↓

← → ↑ || 🖨️ 🔍 ? @ FR (5096) 11/2014

This screen appears when you use “MSG History” (F10) from the initial eAlerts Maintenance screen (see Page 15). This screen shows a history of the eAlerts that were delivered to this member (only if an online banking message was sent). Other message types, such as PIB and eNotice messages show on this screen. All columns are sortable, and you can see if an email was sent along with the message. Double-click on any item in the list to read the complete message presented to the member in the **It’s Me 247** Secure Message Center.



Once they have been read by the member in **It's Me 247**, eAlert messages will be **retained for 30 days**. eAlerts that have not been read by the member will be purged after 90 days.

SPECIAL INSTRUCTIONS FOR SELF PROCESSING CREDIT UNIONS

NTALERTS SUBSYSTEM

A subsystem called NTALERTS is used to handle the automated processing of eAlerts for your members. Like your subsystem for online banking, this will need to be monitored regularly by your Ops team and must be brought down during your nightly processing.

- ◆ **If you use stand-in processing:** Stand-in will automatically take care of bringing NTALERTS down for you and will bring it back up again once you move out of stand-in.
- ◆ **If you do not use stand-in processing:** Please contact us if you wish to add these steps to your automated end-of-day process.

NOTE: You can stop this subsystem at any time if needed; when it is restarted it will automatically catch up any missed eAlerts from the period during which it was offline.

MEMBER COMMUNICATIONS MENU

The Member Communications Switch Control menu contains options related to eAlerts, including commands to start and stop the subsystem and also an option to display its current status.



To access this menu:

1. OPER
 2. #1 Back Office Products: Rec/Post
 3. #14 Online EFT Processing
 4. #20 Mbr Communications Control Menu
- OR

Use this shortcut command to display the subsystem: **WNTA**

SETTING YOUR MONITORING TIMEFRAME

The near real-time alerts system has been set up so that it automatically monitors your eAlert subscriptions for balance changes at a specified time interval. CU*Answers will be using a 30-minute interval, and your credit union can stay with that timeframe, or you may change it at any time, according to your system resources.

To change the interval to something other than 30 minutes:

1. Navigate to OPER > #1 Back Office Products: Rec/Post > #14 Online EFT Processing > #20 Mbr Communications Control Menu
2. Choose #8 eAlerts Monitoring Interval Cfg
3. Change the delay interval (5 minutes minimum; 30-60 is recommended) as desired
4. Use *Update* (F5) to save changes

CONFIGURATION CHANGE FOR YOUR TRAINING LIBRARY

To prevent eAlerts from being sent inadvertently from your training library (FILE99), you'll need to make the following configuration change:

1. Navigate to OPER > #10 Credit Union Configurations > #3 CU Master Profile (CUMSTRPF)
2. Choose your 99 Training Library entry and press Enter
3. Change the *Available for processing* setting to Never

Available for processing

For your actual credit union live file library, this flag must be set to A = Available. (The system will cycle this to S for stand-in automatically during stand-in processing, then back to A when stand-in is done.)