WSFS Business Online Banking

Version 4.0

Step 1 - Set Up Email Address to Receive Alerts

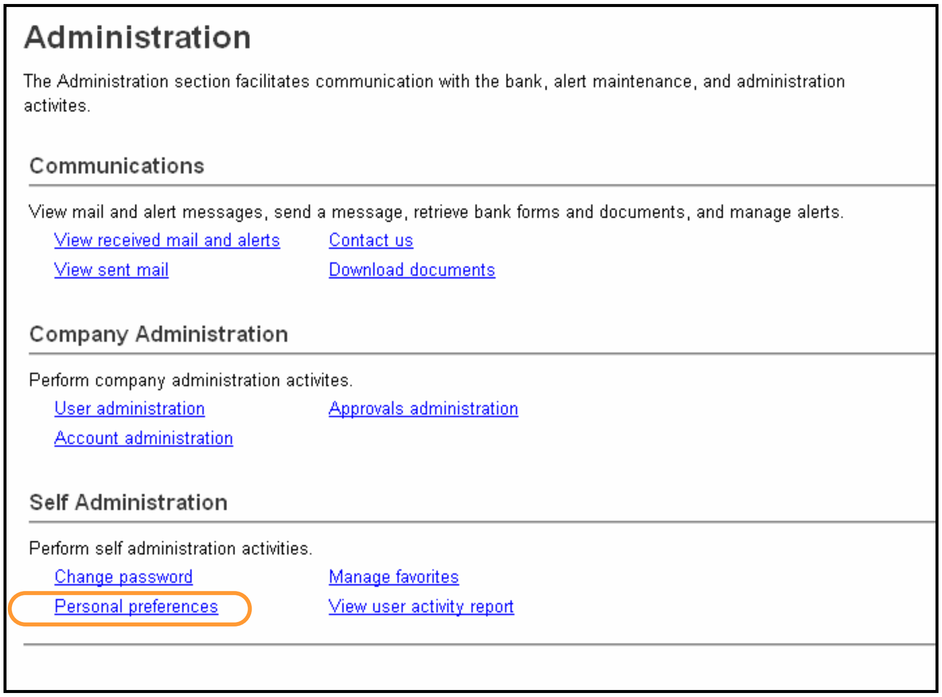
Use **Personal Preferences** to enter or change your primary and secondary e-mail addresses for the receipt of alerts through e-mail. A primary e-mail address is required for e-mail alerts. A secondary e-mail address is optional.

To access the *Personal Preferences* page:

1. Click the **Administration** tab.

   The *Administration Section Overview* page is displayed.

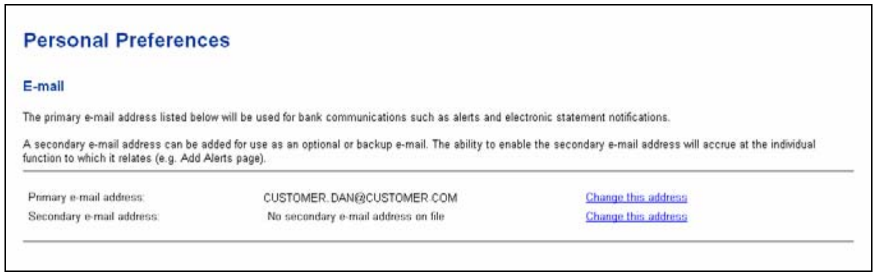
Administration Section Overview Page



2. Click the **Personal preferences** link under **Self Administration**.

   The *Personal Preferences* page is displayed.

Personal Preferences Page

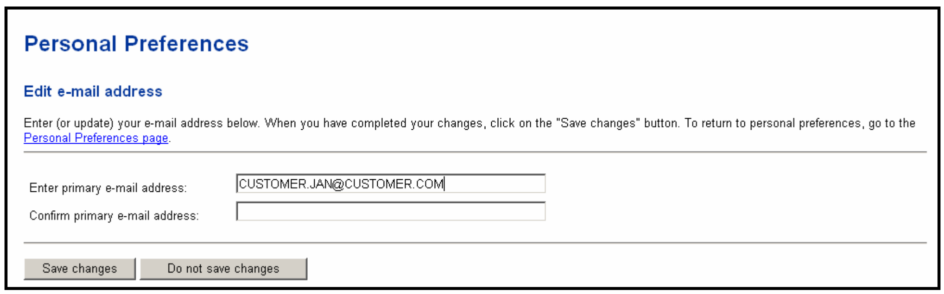


To change your primary or secondary e-mail address:

3. Click the **Change this address** link associated with the e-mail address.

   The *Edit E-Mail Address* page is displayed.

Edit E-mail Address Page



4. Enter the new e-mail address(es).
5. Click **Save changes**.

   A confirmation message is displayed.

Personal Preferences Field Descriptions

Field	Description
Primary e-mail address	The main e-mail address set up to receive e-mail alert messages.
Secondary e-mail address	The second e-mail address setup to receive e-mail alert messages.

Step 2 - Manage Account Alerts

Manage Account Related Alerts

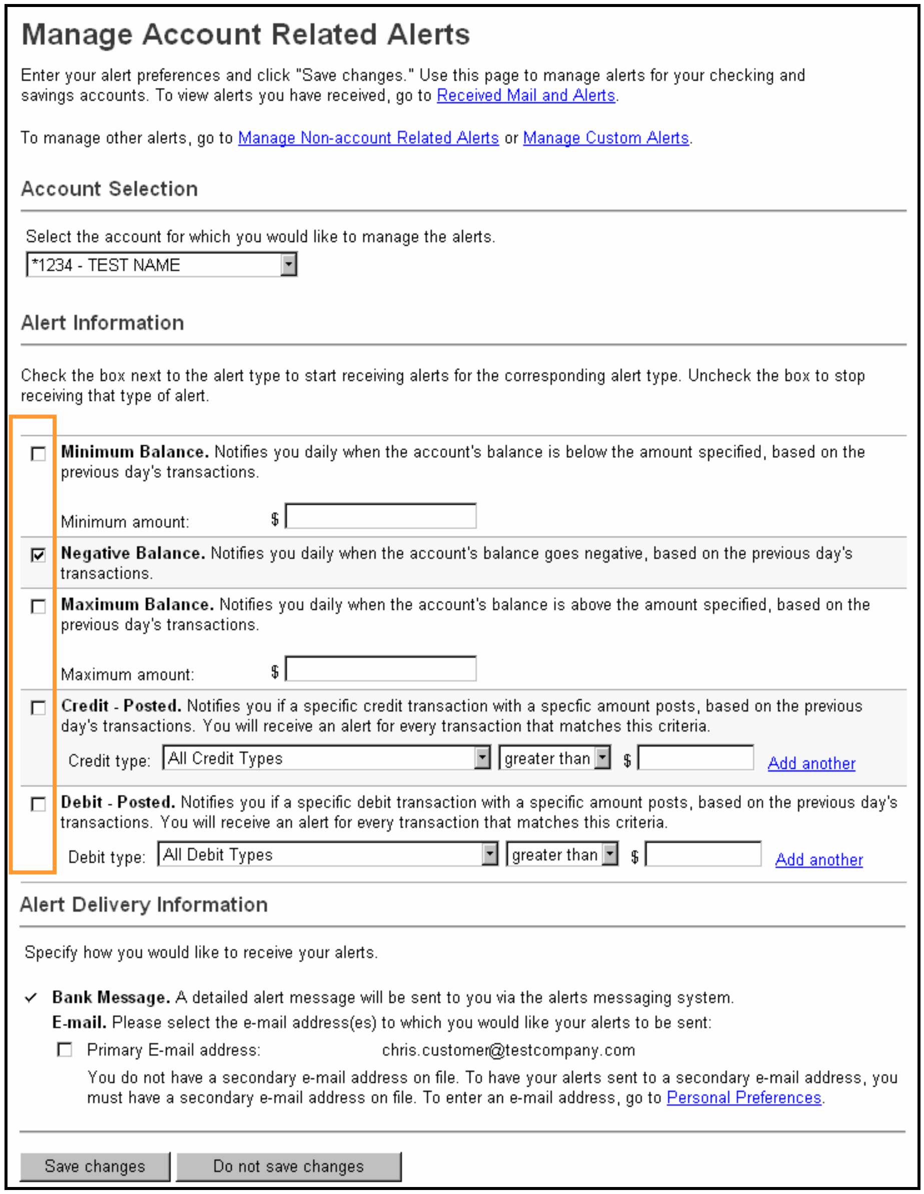
Use **Manage Account Related Alerts** to manage your account related alert messages. Alert requests can be added, modified, or removed.

To access the *Manage Account Related Alerts* page:

- From the *Received Mail and Alerts* page, click the **Manage Account Related Alerts** link.

  The *Manage Account Related Alerts* page is displayed.

Manage Account Related Alerts Page



Manage Account Related Alerts

Enter your alert preferences and click "Save changes." Use this page to manage alerts for your checking and savings accounts. To view alerts you have received, go to Received Mail and Alerts.

To manage other alerts, go to Manage Non-account Related Alerts or Manage Custom Alerts.

Account Selection

Select the account for which you would like to manage the alerts.

*1234 - TEST NAME

Alert Information

Check the box next to the alert type to start receiving alerts for the corresponding alert type. Uncheck the box to stop receiving that type of alert.

Minimum Balance. Notifies you daily when the account's balance is below the amount specified, based on the previous day's transactions.

Minimum amount: $

Negative Balance. Notifies you daily when the account's balance goes negative, based on the previous day's transactions.

Maximum Balance. Notifies you daily when the account's balance is above the amount specified, based on the previous day's transactions.

Maximum amount: $

Credit - Posted. Notifies you if a specific credit transaction with a specfic amount posts, based on the previous day's transactions. You will receive an alert for every transaction that matches this criteria.

Credit type: All Credit Types greater than $ Add another

Debit - Posted. Notifies you if a specific debit transaction with a specific amount posts, based on the previous day's transactions. You will receive an alert for every transaction that matches this criteria.

Debit type: All Debit Types greater than $ Add another

Alert Delivery Information

Specify how you would like to receive your alerts.

✓ **Bank Message.** A detailed alert message will be sent to you via the alerts messaging system.

E-mail. Please select the e-mail address(es) to which you would like your alerts to be sent:

Primary E-mail address: chris.customer@testcompany.com

You do not have a secondary e-mail address on file. To have your alerts sent to a secondary e-mail address, you must have a secondary e-mail address on file. To enter an e-mail address, go to Personal Preferences.

Save changes | Do not save changes

To begin receiving alerts:

1. Click the **Account Selection** arrow and select an account.

   Note: Only accounts for which you are entitled are available for selection.

2. Select the check box for each alert you want to receive. Enter additional alert criteria, if applicable.

3. Specify the **Alert Delivery Information**.

   The **Bank Message** option is automatically selected and delivers the alerts within Business eBanking (available for viewing on the *Alerts* page).

   The **E-mail** option delivers the alerts to a primary and/or secondary external e-mail address. The e-mail addresses must be set up on the *Personal Preferences* page in order to be selected as a delivery method.

4. Click **Save changes**.

   A confirmation message is displayed.

Account Related Alerts

Alert	Description
Minimum Balance	This alert is sent to users whose starting balance is below the minimum balance set for the account. **Note:** This alert is based on the previous day ledger balance
Negative Balance	This alert is sent to users who have a negative account balance **Note:** This alert is based on the previous day ledger balance
Maximum Balance	This alert is sent users whose starting balance is above the maximum balance set for the account. **Note:** This alert is based on the previous day ledger balance
Outgoing Wire Status Change	This alert is sent to users when the status for an outgoing wire (from the selected account) changes.
Express Transfer Approval Pending	This alert is sent to all users who have the approver roll for an account where an express transfer has been entered but not transmitted.
Funds Transfer Approval Pending	This alert is sent to all users who have the approver roll for an account where a funds transfer has been entered but not transmitted.
ACH Approval Pending	This alert is sent to all users who have the approver roll for an account where an ACH has been entered but not transmitted.
Wire Approval Pending	This alert is sent to all users who have the approver roll for an account where a wire has been entered but not transmitted.
Positive Pay	This alert is sent to users who have positive pay exception items that need

	to be resolved. **Note:** This alert is not available for use with the current positive pay service, it will be available when the new Positive Pay service is made generally available.
Credit Posted	This alert is sent to users when they have a credit transaction with a specific amount posted on the previous night. The user receives an alert for every transaction that matches this criterion.
Debit Posted	This alert is sent to users when they have a debit transaction with a specific amount posted on the previous night.
Check Presented	This alert is sent to users when a specific check payment has processed.
ACH Template Activity	This alert is sent to users when there is an account that has an ACH transfer approval pending for which they are an approver.
Wire Template Activity	This alert is sent to users when there is an account that has a wire request approval pending for which they are an approver.
Stop Payment	This alert notifies you when a stop payment is requested.
Stop Payment Cancellation	This alert notifies you when a stop payment is canceled.