

Business Online Services


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# Setting Up Alerts Guide

*Alerts for Account Reconciliation & Positive Pay*



**FINEMARK**  
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# Account Reconciliation & Positive Pay Alerts

## Setting up alerts for your Business Banking Account

Log in to Business Online Banking through [www.finemarkbank.com](http://www.finemarkbank.com).

Once logged into your business account, at the top of the page go to **Administration** and in the drop down select **Communications**.

The screenshot shows the 'Administration' page with the 'Communications' dropdown menu open. The main content area displays 'Accounts Summary' with a table of account balances and 'Exception Decisions' with a message: 'There are no exceptions waiting for approval'.

	Current Balance
John Doe's Account ABA/TRC :01234567 0001	\$31.00
John Doe's Lawn Service Account ABA/TRC :01234567 0001	\$0.00
Total Selected Checking Balance	\$0.00
Total of Selected Deposit Accounts	\$0.00

Under the Communications selection, select **Manage Alerts**.

The screenshot shows the 'Communications' page with the 'Manage Alerts' tab selected. The main content area displays 'Received Mail and Alerts' with a table of messages.

Date	Status	Type	Sent From	Subject
08/15/2023 10:04:52 AM (ET)	Unread	Alert	Bank	<a href="#">Password Changed</a>



# Account Reconciliation & Positive Pay Alerts

Under the Manager Alerts section, in the first sentence click on “**Personal Preferences**”. This allows you to choose the alert method.

The screenshot shows the 'Manage Alerts' page. At the top, there is a navigation bar with 'Welcome', 'Reports', 'Money Movement', 'Account Services', and 'Administration'. The 'Manage Alerts' section contains instructions on how to manage alerts and a link to 'Personal Preferences'. Below this, there are tabs for 'Account', 'Non-Account', 'Multiple Accounts', and 'Custom'. A dropdown menu shows 'John Doe's Account - \*0001'. Under 'Active' alerts, there are sections for 'Transfer and Payment Alerts' (Transaction Failed) and 'Statement and Document Alerts' (Statement Available). A 'Got Questions? We can help +' button is at the bottom right.

To allow text alerts, under the Telephone section, click on the edit feature to the far right of the mobile number.

The screenshot shows the 'Self Administration' page with tabs for 'Change Password', 'Personal Preferences', and 'User Activity Report'. The 'Telephone' section contains instructions on how to manage telephone numbers for alerts. A mobile number field is highlighted with a blue box, and a blue arrow points from the text above to the edit icon (pencil) next to it. There is also an 'Add' button at the bottom.



# Account Reconciliation & Positive Pay Alerts

Click the check box “Use with alerts” and then click “Update”.

**Telephone**

The telephone numbers listed below may 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 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. Messages will come from FINEMARK NATL BANK #829 as Bank Alerts.

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

Phone Type: Mobile

Country/Region: UNITED STATES

Telephone Number: 5555555555

(Area, City Code And Local Number)

Use with alerts

**Update** **Cancel**

Work: (555) 555-5554

**+** Add

Got Questions? We can help +

Once updated, select **Manage Alerts** again. This takes you back to the Manage Alerts screen.

**Self Administration**

Change Password | Personal Preferences | User Activity Report

**Email**

The primary e-mail address listed below will 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 Email Address: john@1234email.com

**+** Add

**Telephone**

The telephone numbers listed below may 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 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. Messages will come from FINEMARK NATL BANK #829 as Bank Alerts.

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

Mobile: (555) 555-5555

Work: (555) 555-5554

**+** Add



# Account Reconciliation & Positive Pay Alerts

Under your **Account**, select the account you would like to start receiving alerts for.

The screenshot shows the 'Manage Alerts' section of the Finemark Business Access portal. At the top, there is a navigation bar with 'Welcome', 'Reports', 'Money Movement', 'Account Services', and 'Administration'. The user is logged in as 'john@1234email.com' and the last login was on Aug 24, 2021, at 9:56:51 AM ET. The page title is 'FineMark Business Access' and it includes links for 'Approvals' and 'Exceptions'. The main heading is 'Communications' with sub-links for 'Mail and Alerts', 'Sent Mail', 'Forms and Documents', 'Manage Alerts', and 'Contact Us'. The 'Manage Alerts' section contains instructions on how to manage alerts and a search bar. Below the search bar, a dropdown menu is open, showing two account options: 'John Doe's Account - \*0001' (highlighted) and 'John Doe's Lawn Service Account'. The 'Account' tab is selected in the filter menu. Below the search results, there are two sections: 'Transaction Failed' and 'Account Reconciliation & Positive Pay Alerts', each with a 'Send To' field containing 'john@1234email.com'. A 'Got Questions? We can help +' button is located at the bottom right.



# Account Reconciliation & Positive Pay Alerts

Scroll down to the **Available** alerts, under **Account Reconciliation and Positive Pay Alerts**, you will see the + sign in a circle at the far right of each line. Individually select each type to receive alerts for.

Account: John Doe's Account - 10001

**Active**

**Transfer and Payment Alerts**

Transaction Failed Send To: john@1234email.com

**Statement and Document Alerts**

Statement Available

**Available**

**Balance and Activity Alerts**

Check Presented (+)

Credit Posted (+)

Debit Posted (+)

Maximum Balance (+)

Minimum Balance (+)

Negative Balance (+)

**Transfer and Payment Alerts**

ACH Approval Pending (+)

ACH Template Activity (+)

ACH Template Approval Pending (+)

Scheduled ACH Approval Pending (+)

ACH Transaction Returned for Edit (+)

ACH Transaction Approval Reminder (+)

Multiple Account Transfer Approval Pending (+)

Multiple Account Transfer Template Activity (+)

Multiple Account Transfer Template Approval Pending (+)

Scheduled Multiple Account Transfer Approval Pending (+)

Internal Transfer Approval Pending (+)

Scheduled Internal Transfer Approval Pending (+)

Outgoing ACH Transaction Status Changed (+)

**Account Reconciliation & Positive Pay Alerts**

Account State Date (+)

ACH Positive Pay (+)

Check Issue Approval Pending (+)

Positive Pay (+)

Positive Pay Exception Reminder (+)

ACH Positive Pay Exception Reminder (+)



# Account Reconciliation & Positive Pay Alerts

Check the box(s) next to preferred method for alerts: **Email** and/or **Text**. Then to the left click “Add”.

The screenshot displays the 'Account Reconciliation & Positive Pay Alerts' section of the Finemark Business Access portal. The interface includes a navigation bar with 'Welcome', 'Reports', 'Money Movement', 'Account Services', and 'Administration'. A 'SignOff' link and 'Last Login: Aug 24, 2021, 9:56:51 AM ET' are visible in the top right. The main content area is titled 'Account Reconciliation & Positive Pay Alerts' and features a 'Send To:' section with checkboxes for 'Email' (john@1234email.com) and 'Text' ((555) 555-5555). Below this, there are several alert categories, each with an 'Add' button and a 'Cancel' button. The categories are: 'ACH Positive Pay', 'Check Issue Approval Pending', 'Positive Pay', 'Positive Pay Exception Reminder', 'ACH Positive Pay Exception Reminder', 'Stop Payment Alerts', 'Stop Payment', 'Stop Payment Cancellation', and 'Wire Transfer Alerts'. A 'Got Questions? We can help' link is located at the bottom right of the interface.