Alerts Quick Reference Guide

GETTING STARTED

Alerts allows you to create notifications for important account information such as a payment cutoff time or when an account balance goes below or above a specified threshold.

Access MUFG Exchange using the following link: https://sso.mufgamericas.com

At the Sign On page enter your User ID and Passcode.

To Create an Alert Recipient

Select Alert Center from the People icon drop-down menu.

N 0		Good Morning Sample User 🛛 SIGN OFF
		Privacy Policy ?
		Administration
		Administration Console
_	Pie Ch	User Maintenance
sing L	edger 1	Alert Center
	Total Bal∉	Contact Center
		Import
ncy	Туре	Preferences
	Deme	

2 Select the **Recipients** tab.

3 Select the Insert link to create a new Recipient.

Alerts Cente	r
Alerts	Recipient Group 2 Recipients
⊕ Insert 3	

4 Enter the appropriate information.

- Select the Add Another Contact Method, to add an additional email address.
- 6 Click Save.

Recipient			
* Company			
Sample Company			
. _{Name} (4)			
* Email Address			
•			
ADD ANOTHER	CONTACT METHOD		
		•	
SAVE	CANCEL		



To Modify an Alert Recipient

• Select Alert Center from the People icon drop-down menu.



2 Select the **Recipients** tab.



3 Select **Modify** from the down arrow in the Actions column.

	Recipient Groups	Recipients
sert		
1 Client	Email Recipients Deleted	
Selec	t fields	•
All	Actions	
	View -	
	View . Modify	
ving 1-3 of	f 3 records	

• Modify the current Email Address or Add Another Contact Method.

6 Click Save. Changes made to a Recipient's contact method will need to be manually updated for existing Alerts.

ecipient
Company
Sample Company
Asme
Sample Name 1
Imail Address
sampleusert@email.com
<u> </u>
Contact Methods
ADD ANOTHER CONTACT METHOD
5 SAVE CANCEL

Delete an Alert Recipient

1 Select Alert Center from the People icon drop-down menu.



2 Select the **Recipients** tab.

Alerts Center		
Alerts	Recipient Group	Recipients

3 Select **Delete** from the down arrow in the Actions column.

Alerts Center					
Alerts	Recipient Groups	Recipients			
⊕ Insert					
Filter	t fields	•			
	Actions				
	View -				
	View Modify				
	View .	_			
Viewing 1-3 o	f 3 records				
DELETE					

• Select **Yes** from the Confirm Delete screen.



To Create an Alert

1 Select Alert Center from the People icon drop-down menu.



2 Select Add New Alert link.

Alerts Cente	۲	
Alerts	Recipient Groups	Recipients
2	Jert	

- 3 Enter the appropriate details.
- 4 Click Save.

Note: Some Alert types may generate additional fields.

All required fields are marked with an asterisk (*).

* Alert Name				
Test				
* Alert Group	3	* Alert Type		* Alert Subject Line
Payments and Transfers	х т	File Import Confirmation For Payments and Transfers	х т	[secure]Confirmation of Payment/Transfer File Import
Recipients/Recipient Groups				
SAVE CANCEL				

To Modify an Alert

1 Select Alert Center from the People icon drop-down menu.



2 Select **Modify** by clicking the down arrow in the Actions column.

Add New Alert Alert Submitted All Actions Alert Name Alert Group User OTTest Information Report Q Modify Payments and Tran Vewing 1-2 of 2 records	Add New Alert Alert Submitted Iter Select fields All Actions Alert Name Alert Group Wew OTTest Information Re Modify Payments and Delete Payments and Delete		cipients	roups Re	Recipient G	Alerts			
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All Actions Alert Name Alert Group User OTEst Information Report Modify Delete Vewrg 1-2 of 2 records	All Actions Alert Name Alert Group Vew 017est Information Re 2 Modify Payments and Delete Payments and			•	t heids	ilter Selec			
View - 01Test Information Report Order Payments and Tran View g 1-2 of 2 records	View	oup	Alert Group	Alert Name	Actions	🗆 All			
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Delete Viewing 1-2 of 2 records	Delete	and Tran	Payments and T	у	2 Modif				
Viewing 1-2 of 2 records				à	Delet	4			
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	viewing ris or a records				2 1000103	viewing the o			

3 Modify the Alert details.



To Delete an Alert

O Select Alert Center from the People icon drop-down menu.



2 Select **Delete** by clicking the down arrow in the Actions column.

Alerts Cent	er		
Alerts	Recipient	Groups Red	cipients
Add New Filter Sele	Alert	•	
	Actions	Alert Name	Alert
	View 👻	Outgoing Wire	Inform
	View Mod	ify	Inform
	View .		g Payme
Viewing 1-3	of 3 records		

3 Click **Yes** from the Confirm Delete pop-up screen.

