

Alerts Quick Reference Guide

MUFG EXCHANGE

GETTING STARTED

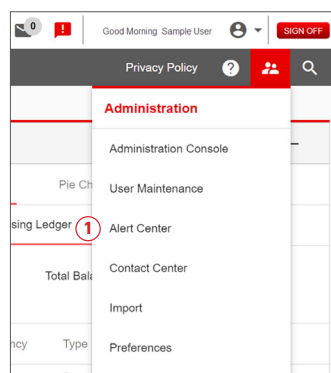
Alerts allows you to create notifications for important account information such as a payment cutoff time or when an account balance goes below or above a specified threshold.

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

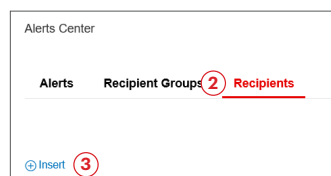
At the Sign On page enter your User ID and Passcode.

To Create an Alert Recipient

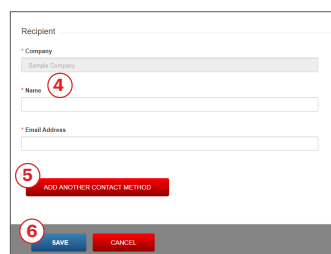
- 1 Select **Alert Center** from the People icon drop-down menu.



- 2 Select the **Recipients** tab.
- 3 Select the **Insert** link to create a new Recipient.



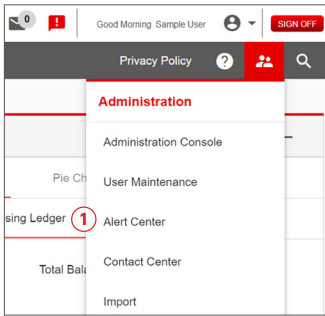
- 4 Enter the appropriate information.
- 5 Select the **Add Another Contact Method**, to add an additional email address.
- 6 Click **Save**.

A screenshot of the 'Recipient' form. It has a 'Company' field with 'Sample Company' entered. The 'Name' field is highlighted with a red circle and the number '4'. Below it is the 'Email Address' field. At the bottom, there is a red button labeled 'ADD ANOTHER CONTACT METHOD' with a plus icon, highlighted with a red circle and the number '5'. Below that are 'SAVE' and 'CANCEL' buttons, with 'SAVE' highlighted with a red circle and the number '6'.

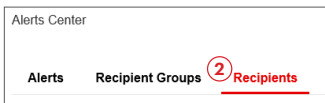
(continued)

To Modify an Alert Recipient

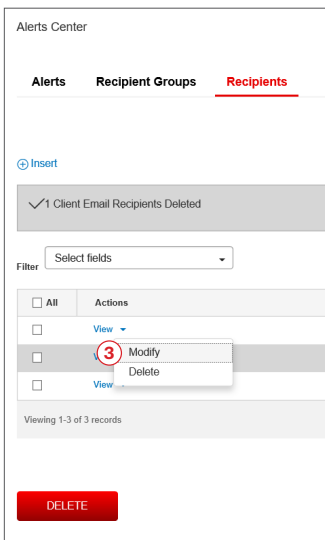
- 1 Select **Alert Center** from the People icon drop-down menu.



- 2 Select the **Recipients** tab.

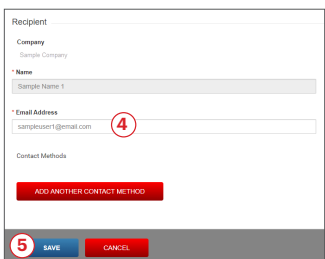


- 3 Select **Modify** from the down arrow in the Actions column.



- 4 Modify the current **Email Address** or **Add Another Contact Method**.

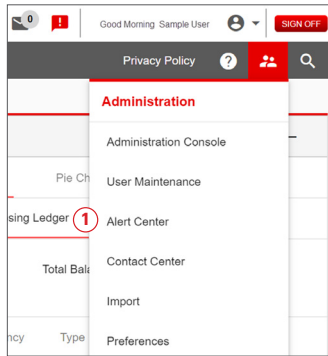
- 5 Click **Save**. Changes made to a Recipient's contact method will need to be manually updated for existing Alerts.



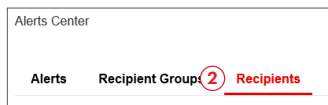
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Delete an Alert Recipient

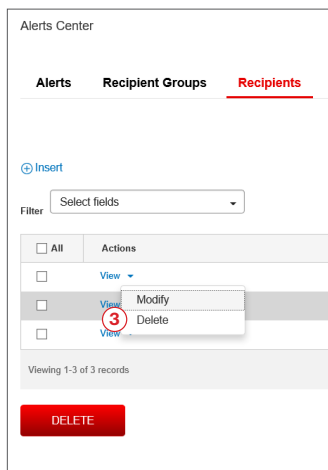
1 Select **Alert Center** from the People icon drop-down menu.



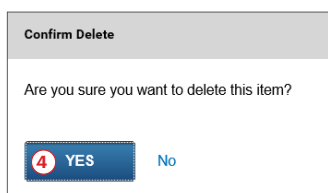
2 Select the **Recipients** tab.



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



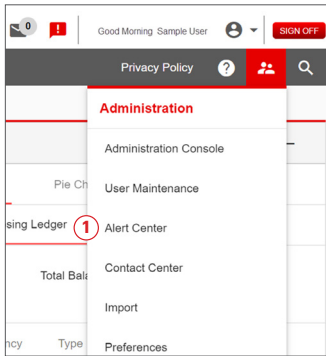
4 Select **Yes** from the Confirm Delete screen.



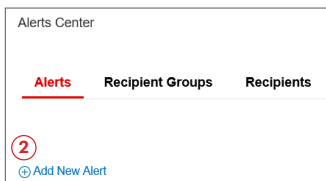
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To Create an Alert

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



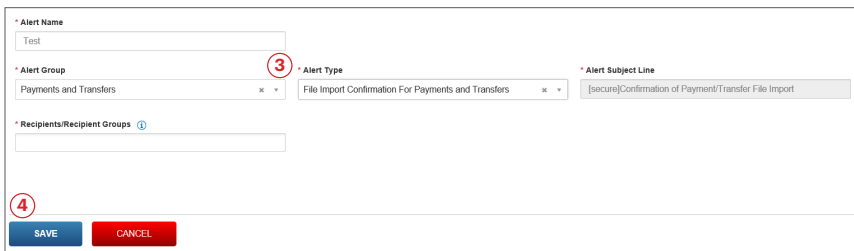
2 Select **Add New Alert** link.



3 Enter the appropriate details.

4 Click **Save**.

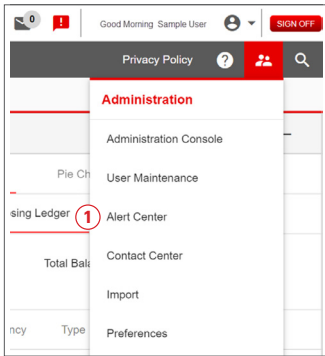
Note: Some Alert types may generate additional fields.
All required fields are marked with an asterisk (*).

A screenshot of the "Alert" creation form. The form has four main sections: "Alert Name" with a text input field containing "Test"; "Alert Group" with a dropdown menu showing "Payments and Transfers"; "Alert Type" with a dropdown menu showing "File Import Confirmation For Payments and Transfers"; and "Alert Subject Line" with a text input field containing "[secure]Confirmation of Payment/Transfer File Import". There is also a "Recipients/Recipient Groups" section with a text input field. At the bottom of the form, there are two buttons: "SAVE" and "CANCEL". A red circle with the number "4" is placed over the "SAVE" button.

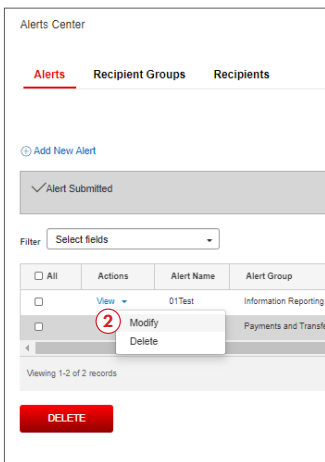
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To Modify an Alert

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

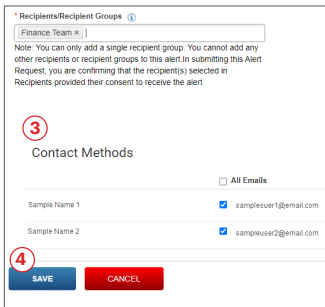


2 Select **Modify** by clicking the down arrow in the Actions column.



3 Modify the Alert details.

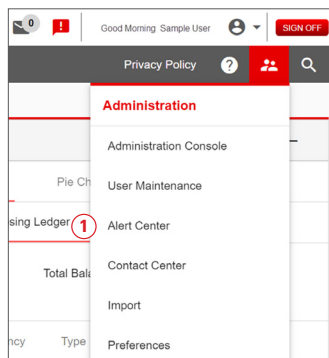
4 Click **Save**.



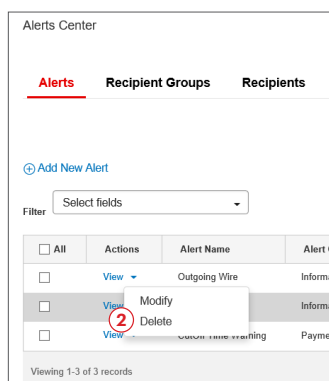
(continued)

To Delete an Alert

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



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



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

