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. Prior to creating an Alert you must first add the alert recipients and create any required recipient groups.

Alerts can be found in two different areas of the system. The majority of the Alerts are found in the Alert Center, but some other important alerts are found in Check Manager under the Receivables tab. This guide will first focus on the alerts in the Alerts Center and then will focus on the alerts found in Check Manager.

Alerts found in the Alert Center center around the following services:

- Information Reporting (including Account and Billing Statements)
- Payments and Transfers
- Administration
- Utilities (Quick Reports/Legacy Reports)
- Check Management (Stop Payments)
- Payment Automation

Alerts for the following services will be found in Check Manager under the Receivable tab:

- Account Activity such as Controlled Disbursement presentment totals
- Lockbox
- Positive Pay
- Statements

Access MUFG Exchange using the following link: sso.mufgbank.com
At the Sign On page enter your User ID and Passcode.

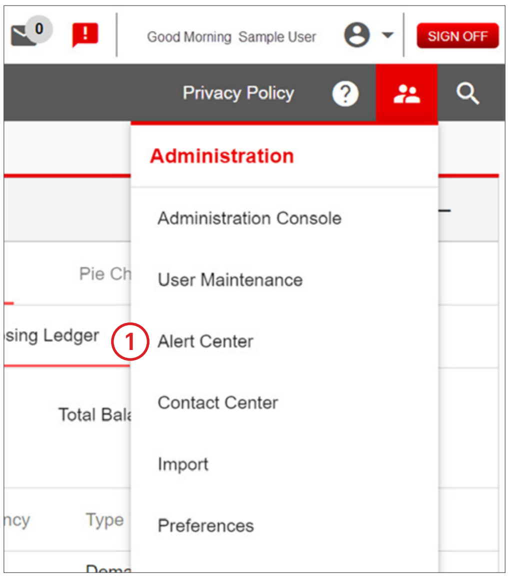
MUFG EXCHANGE ALERT CENTER

Access Alert Center

There are three ways to access the Alert Center. Administrators can access the Alert Center using the People icon drop-down. Alternatively all users can access the Alert Center by clicking on the Bell icon or by adding the Alert Center widget to a convenient page. One suggestion is to add it to the Balance and Transaction Reporting screen.

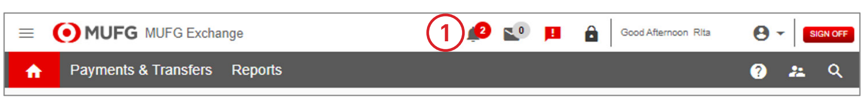
Access from the People Icon

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



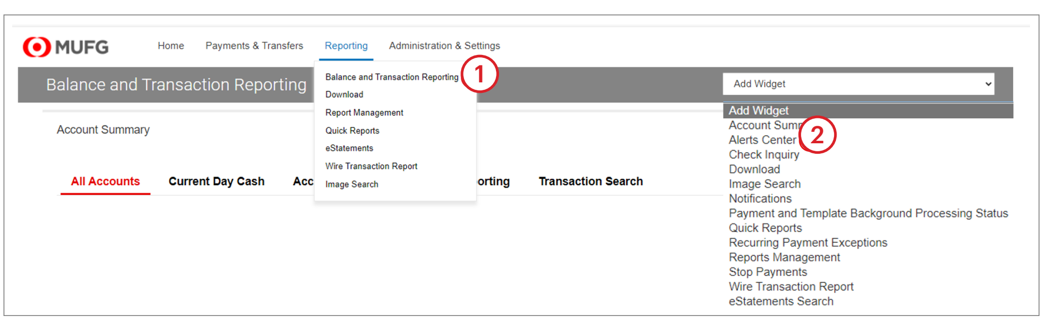
Bell Icon

1. From any screen, click the **Bell** icon at the top of the screen.



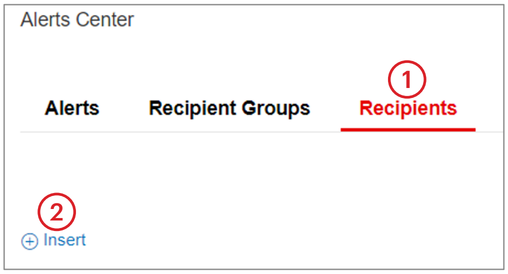
Add the Alert Center Widget

1. Select **Balance and Transaction Reporting** from the Reporting drop-down menu.
2. Select **Alert Center** from the Add Widget drop-down menu.

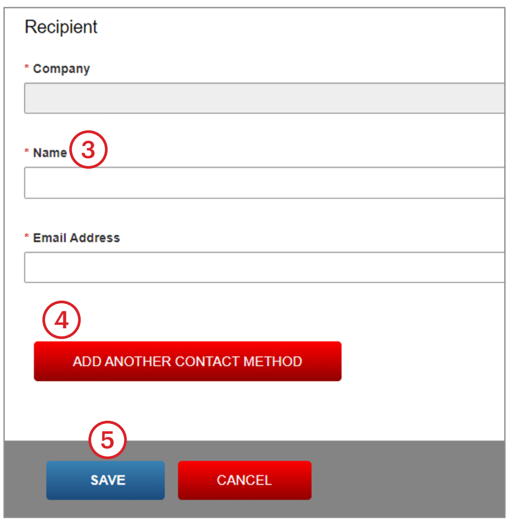


Create an Alert Recipient

1. Select the **Recipients** tab in the Alert Center.
2. Select the **Insert** link to create a new Recipient.

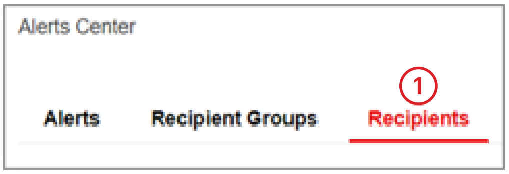


3. Enter the appropriate information.
4. Select the Add Another Contact Method, to add an additional email address.
5. Click Save.

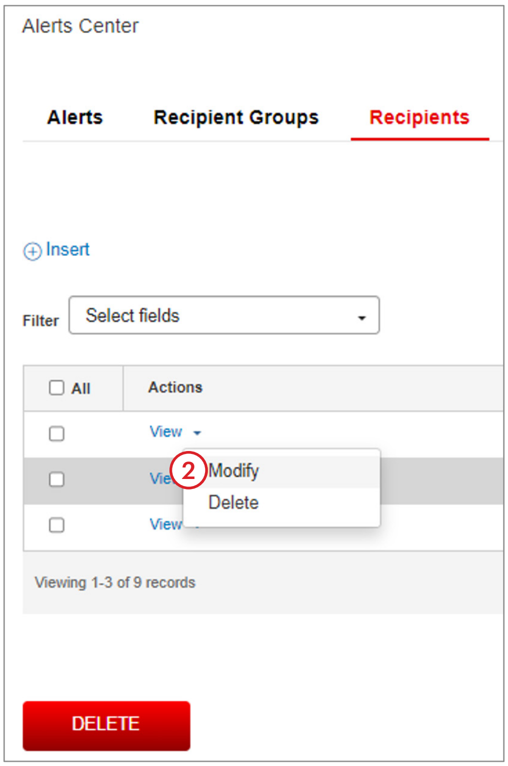


To Modify an Alert Recipient

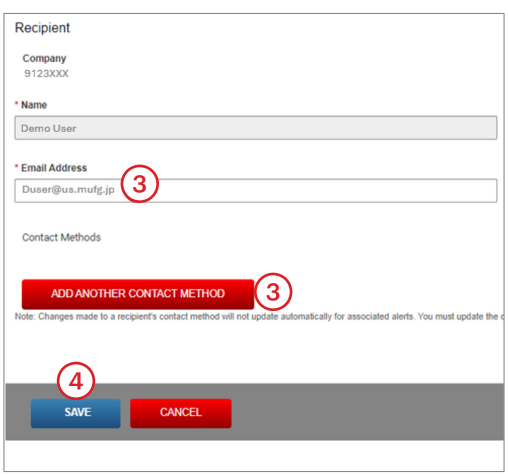
1. Select the **Recipients** tab in the Alerts Center.



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

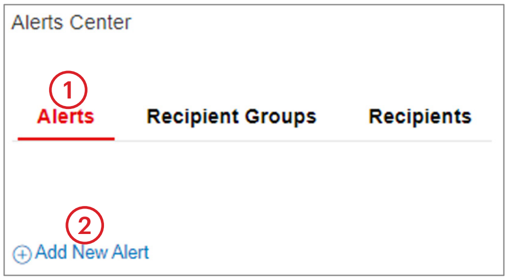


3. Modify the current **Email Address** or **Add Another Contact Method**.
4. Click **Save**. Changes made to a Recipient's contact method will need to be manually updated for existing Alerts.



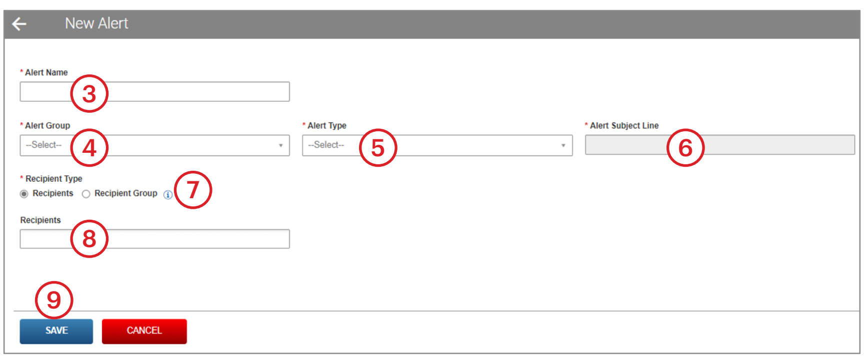
To Create an Alert

1. Select **Alerts** in the Alerts Center.
2. Select **Add** New Alert.



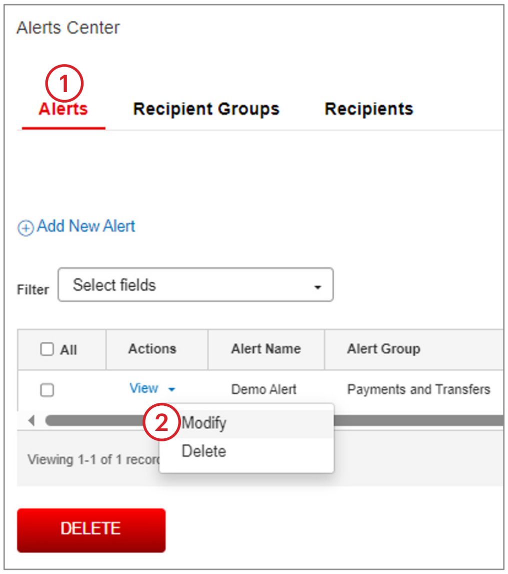
3. Enter your desired **Alert Name**.
4. Choose the **Alert Group** from the drop-down menu.
5. Choose the **Alert Type** from the drop-down menu.
6. **Alert Subject Line** will automatically fill based on the Alert Type chosen.
7. Click the desired **Recipient Type** radio button.
8. Click the Recipients/Recipient Group box and choose the required recipients or recipient groups.
9. When all required fields are complete, click **Save**.

Note: Some Alert types may generate additional fields. All required fields are marked with an Asterisk (*). See the Alerts Appendix (create a link here) for a list of and definitions of the Alert Groups and Alert Types. Recipients and/or Recipient Groups must be created first. Then they can be added to an Alert.

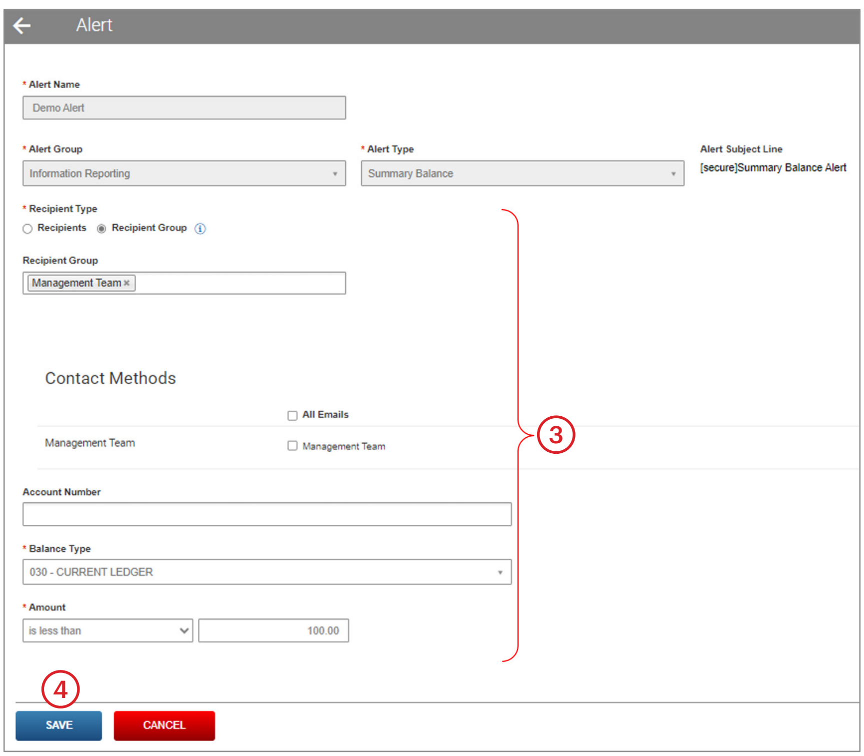


To Modify an Alert

1. Select **Alerts** from the Alerts Center.
2. Select **Modify** by clicking the down arrow in the Actions column.

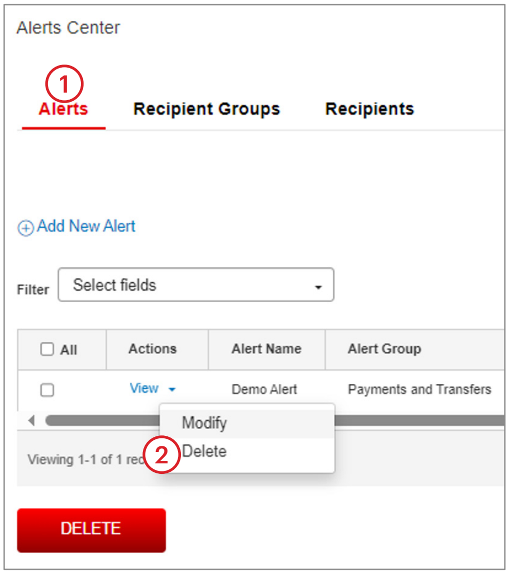


3. Modify the Alert details.
4. Click **Save**.

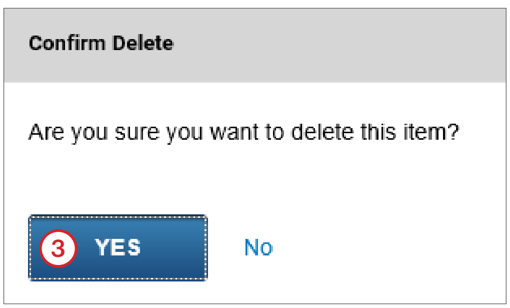


To Delete an Alert

1. Select **Alerts** from the Alert Center.
2. Select **Delete** from the drop-down menu in the Actions column.



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



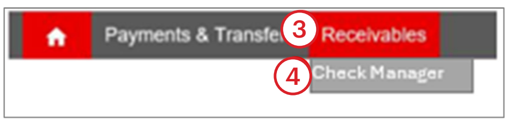
CHECK MANAGER ALERTS (EVENT MANAGER)

In this module alerts or notifications are called Events and the recipients are called Delivery Addresses. This section will explain how to create Delivery Addresses and Events. Please note that there are two major differences when creating Check Manager Events versus creating Alerts in the Alert Center.

- Delivery Addresses must be created and approved prior to assigning them to any Event.
- Events are assigned to the User ID that created the Event. If the User ID is deleted, the event is also deleted. A message is sent to the delivery addresses tied to the event and no additional messages are sent. However, prior to deleting the User ID, the Event may be reassigned to another User ID.

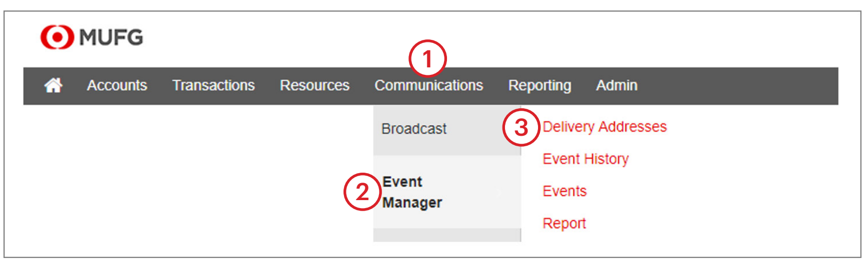
Access Check Manager

1. Access MUFG Exchange using the following link: sso.mufgbank.com.
2. Use your User ID and Passcode to sign on to the system.
3. From the Home Page click the **Receivables** tab.
4. From the drop-down menu click **Check Manager**.

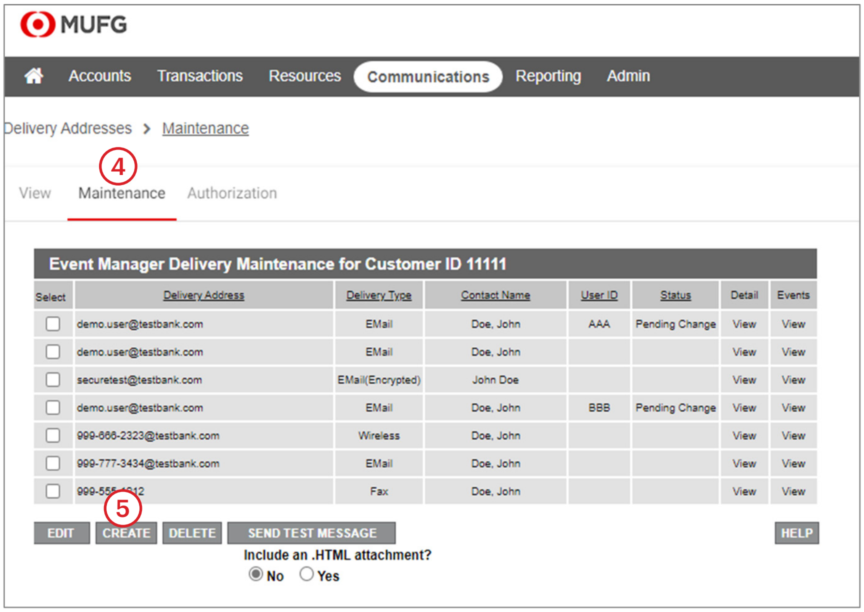


Create a Delivery Address

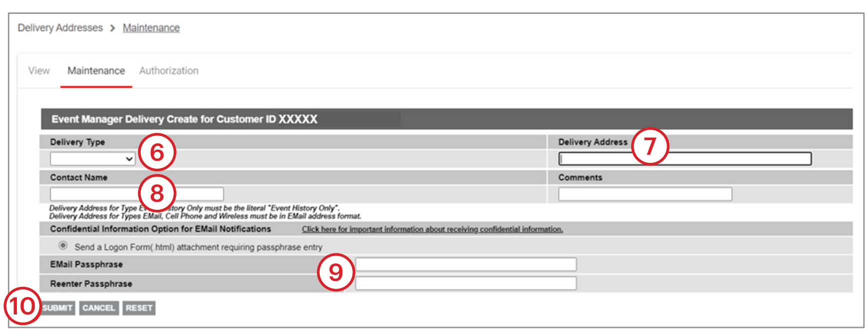
1. Click Communications in the Check Manager menu.
2. Choose Event Manager in the Communications drop-down menu.
3. Choose Delivery Addresses in the Event Manager drop-down menu.



4. Click **Maintenance**.
5. Click **Create**.

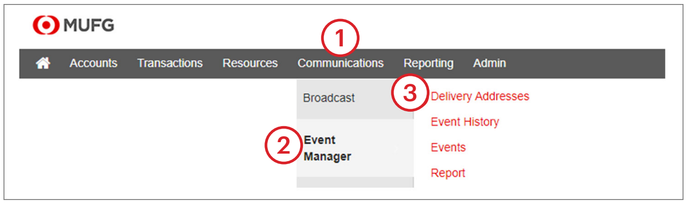


6. Use the **Delivery Type** drop-down menu to choose the method you want to notify this user, e.g., cell phone or email.
7. Add the **Delivery Address** for this user, e.g., cell phone number or email address.
8. Add the **Contact Name**.
9. Enter and Reenter an **Email Passphrase** which is needed to open attachments in the notification. The passphrase must be at least 10 characters in length, a maximum of 20 characters long, required on an address with a delivery type of "Email", and contain only characters A-Z, a-z, 0-9, and spaces. All leading and trailing spaces are removed. Passphrases are case-sensitive.
10. Click **Submit** to return you to the Delivery Addresses Maintenance screen. The status for this new Delivery Address with be Pending Add. It cannot be added to an Event until it has been approved by another Administrator and the status changes to Active.

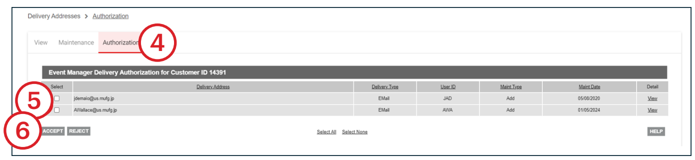


Approve a Delivery Address

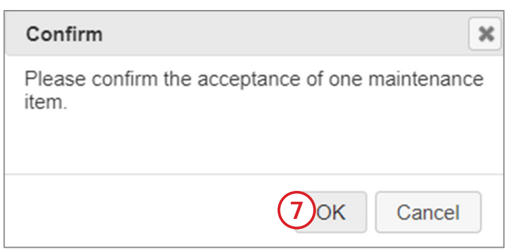
1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Delivery Addresses** in the Event Manager drop-down menu.



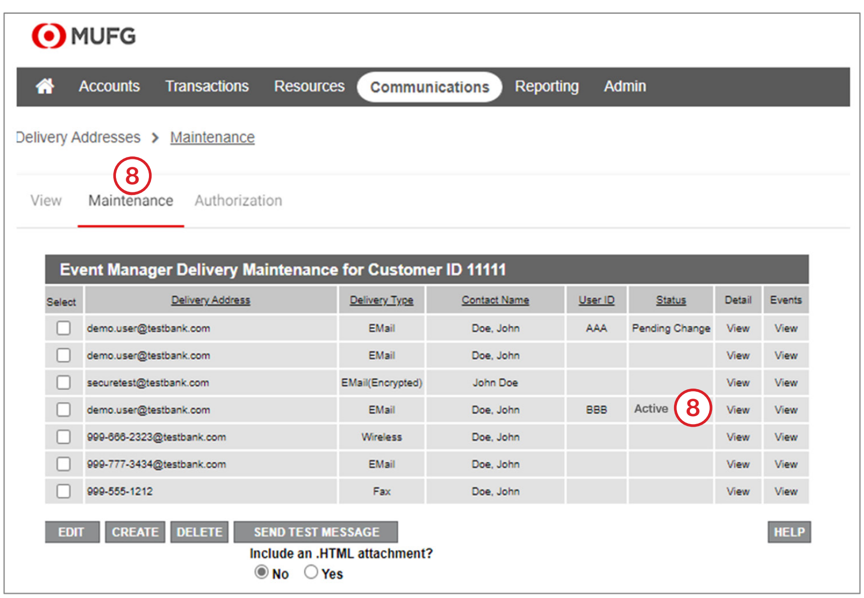
4. Click **Authorization**.
5. Click the checkbox next to the **Delivery Address** that needs to be approved.
6. Click **Accept**.



7. A confirmation message will appear confirming the acceptance of "X" maintenance item(s). Click **OK**.

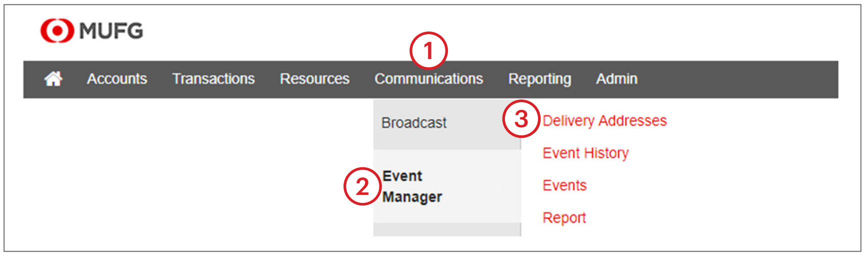


8. Click **Maintenance** to return you to the Delivery Addresses Maintenance screen. The status for this Delivery Address should now be Active.

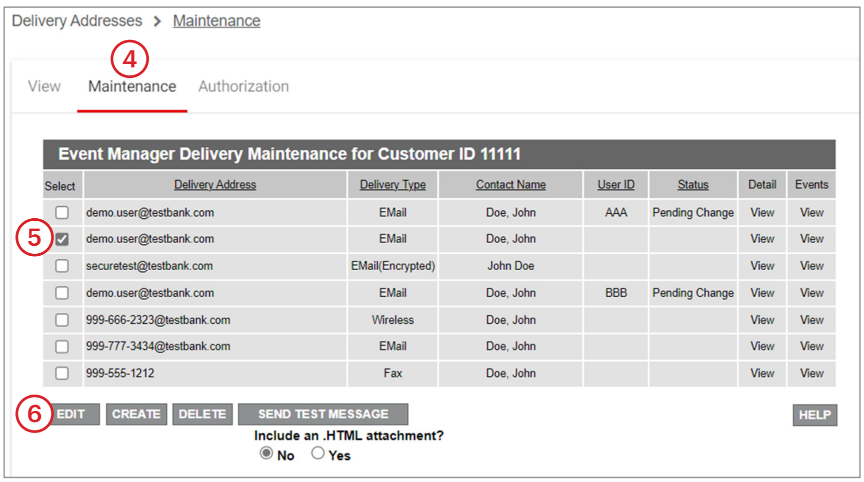


Modify (Edit) a Delivery Address

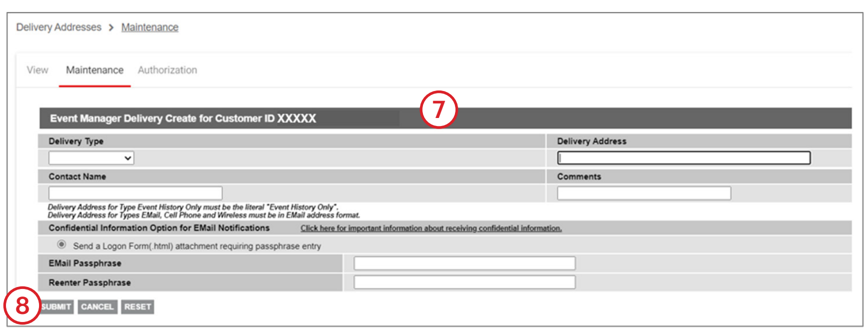
1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Delivery Addresses** in the Event Manager drop-down menu.



4. Click **Maintenance**.
5. Click the checkbox next to the **Delivery Address** that needs to be revised.
6. Click **Edit**.



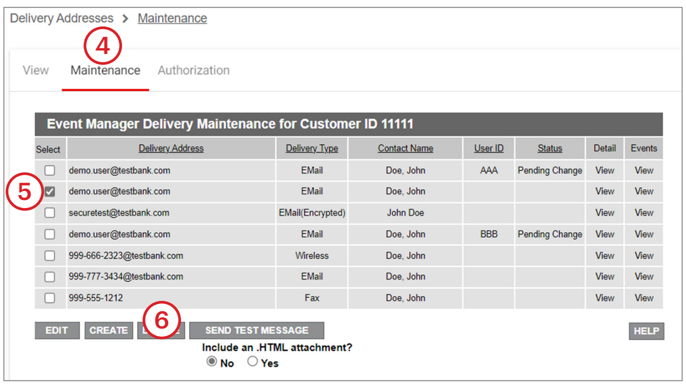
7. Make the necessary changes to the Delivery Address details.
8. Click **Submit**. This will return you to the Delivery Addresses Maintenance screen. The status for this Delivery Address should now be Pending Change. The revision is not in effect until it has been approved by another Administrator and the status changes to Active.



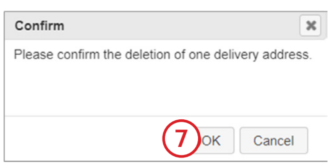
Delete a Delivery Address

1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Delivery Addresses** in the Event Manager drop-down menu.

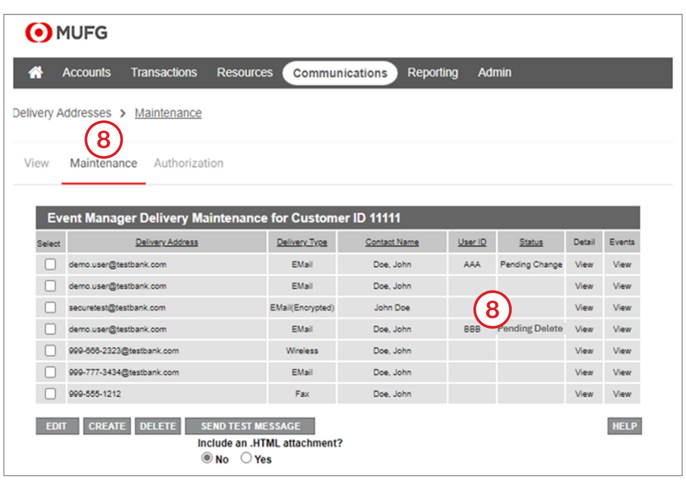
4. Click **Maintenance**.
5. Click the checkbox next to the **Delivery Address** that needs to be deleted.
6. Click **Delete**.



7. A confirmation message will appear confirming the deletion of the “X” number of Delivery Addresses. Click **OK**.

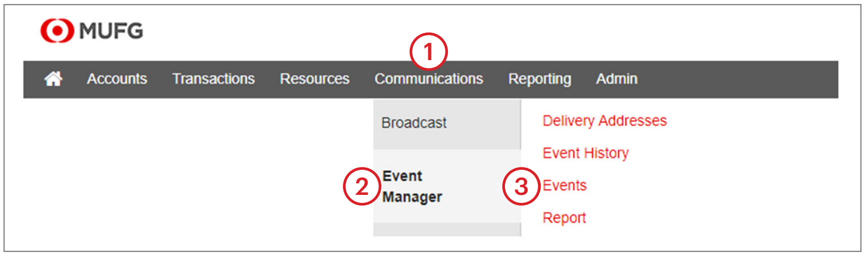


8. Click Maintenance to return you to the Delivery Addresses Maintenance screen. The status for this deleted Delivery Address with be Pending Delete. The deletion not in effect until it has been approved by another Administrator and the status changes to Active.

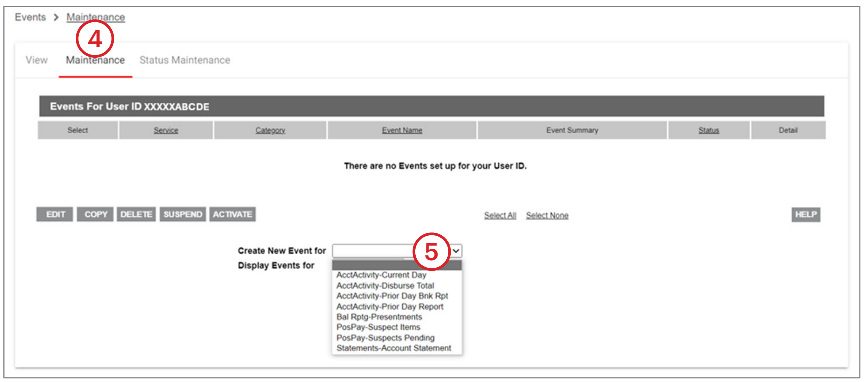


Create an Event (Alert)

1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Events** in the Event Manager drop-down menu.

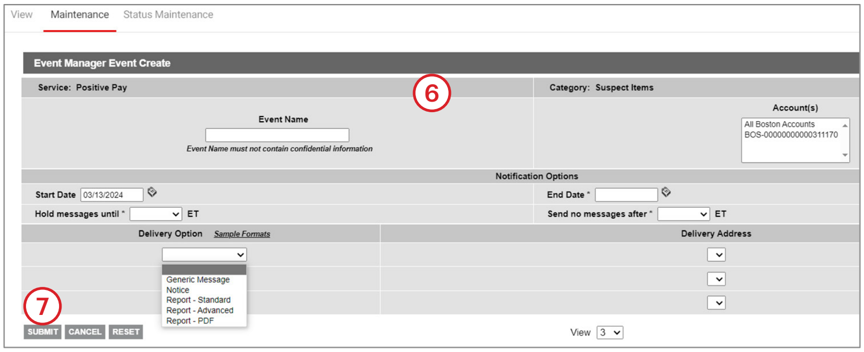


4. Click **Maintenance**.
5. Use the **Create New Event** for drop-down menu to choose the event to create. Refer to the **Alerts Appendix** for details regarding the available Events.



6. Complete the form. Note that optional fields are indicated by an Asterisk (*) and some fields may differ on the various events.
   - **Event Name:** Up to 30 alphanumeric characters. This is the subject line for email notifications.
   - **Account Numbers:** Select All or select up to 5 individual accounts by holding the Ctrl key for Report Notifications only. Other delivery options do not limit the number of accounts.
   - **Start Date:** Enter the date event messages will start.
   - **End Date:** If needed, add the date the messages will stop (optional).
   - **Hold messages until:** If needed, choose a time of day from the drop down. (Optional)
   - **Send no messages after:** If needed choose the time of day to end the messages. Optional)
   - **Delivery Option:** Select up to 10 Delivery Option/Delivery Address combinations. Refer to Delivery Options Appendix for explanation of the delivery methods.
   - **Delivery Address:** Select up to 10 Delivery Option/Delivery Address combinations. Note: Delivery addresses that are added and approved will appear in the drop-down menu.
   - **View:** Use the drop-down arrow to increase the number of available Delivery Option and Delivery Address lines up to 10.

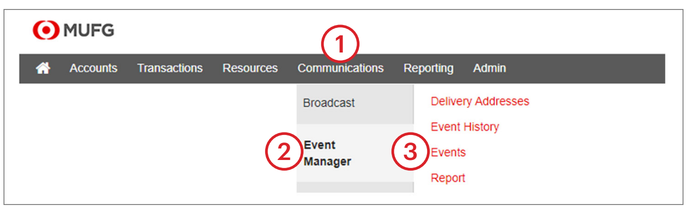
7. Click **Submit**. You will return to the Events Maintenance screen. The new Event will be listed with a status of Active.



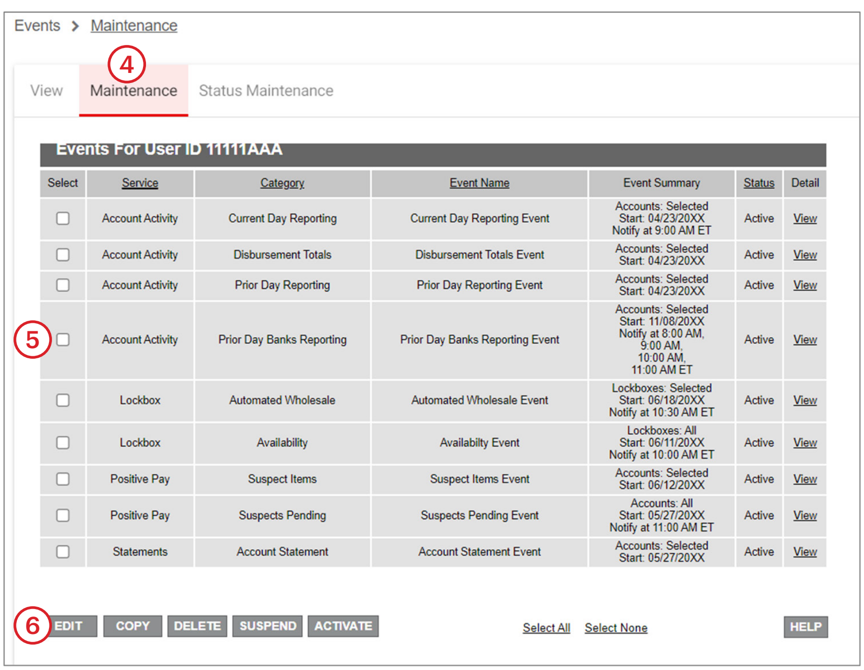
Edit an Event

Editing an Event allows you to change any of the details of the Event. This includes adding or deleting Delivery Addresses, account numbers, timing, etc.

1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Events** in the Event Manager drop-down menu.

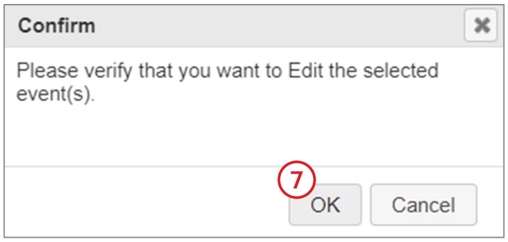


4. Click **Maintenance**.
5. Click the checkbox next to the **Event** that needs to be changed.
6. Click **Edit**.

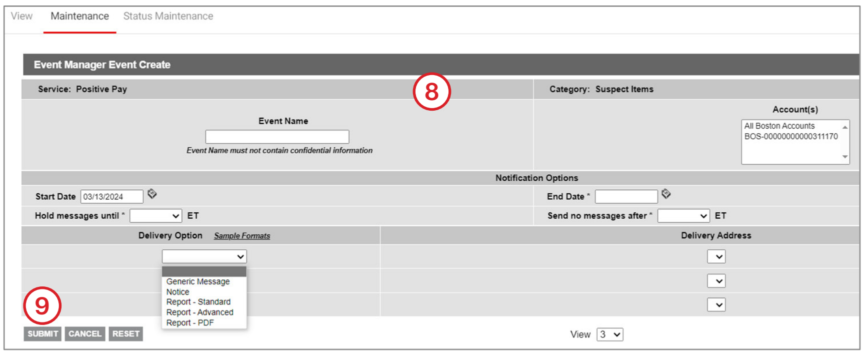


Select	Service	Category	Event Name	Event Summary	Status	Detail
	Account Activity	Current Day Reporting	Current Day Reporting Event	Accounts: Selected Start: 04/23/20XX Notify at 9:00 AM ET	Active	View
	Account Activity	Disbursement Totals	Disbursement Totals Event	Accounts: Selected Start: 04/23/20XX	Active	View
	Account Activity	Prior Day Reporting	Prior Day Reporting Event	Accounts: Selected Start: 04/23/20XX	Active	View
	Account Activity	Prior Day Banks Reporting	Prior Day Banks Reporting Event	Accounts: Selected Start: 11/08/20XX Notify at 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM ET	Active	View
	Lockbox	Automated Wholesale	Automated Wholesale Event	Lockboxes: Selected Start: 06/18/20XX Notify at 10:30 AM ET	Active	View
	Lockbox	Availability	Availabilty Event	Lockboxes: All Start: 06/11/20XX Notify at 10:00 AM ET	Active	View
	Positive Pay	Suspect Items	Suspect Items Event	Accounts: Selected Start: 06/12/20XX	Active	View
	Positive Pay	Suspects Pending	Suspects Pending Event	Accounts: All Start: 05/27/20XX Notify at 11:00 AM ET	Active	View
	Statements	Account Statement	Account Statement Event	Accounts: Selected Start: 05/27/20XX	Active	View

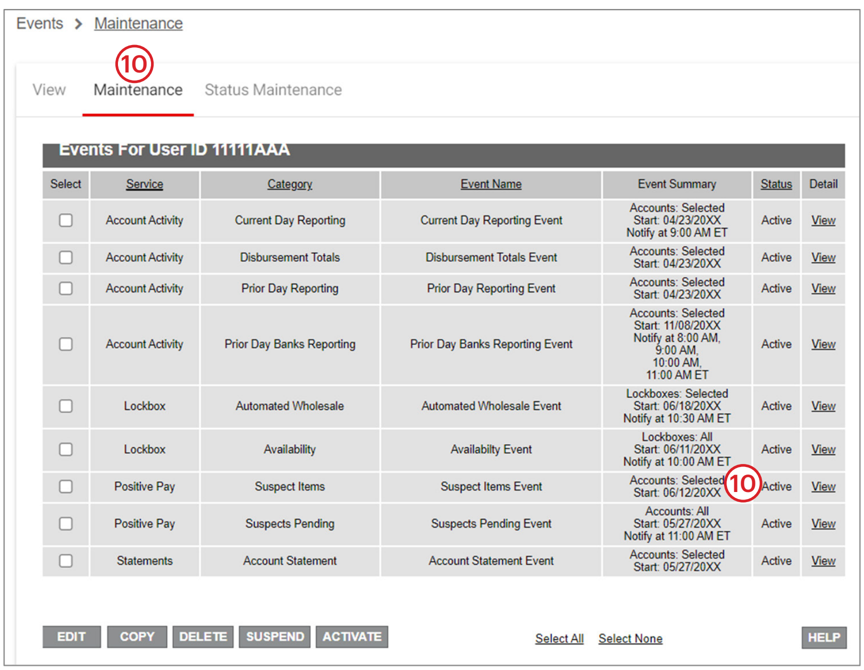
7. A confirmation message will appear confirming that you want to Edit the selected Event. Click **OK**.



8. Make the appropriate changes to the **Event** details.
9. Click **Submit**.



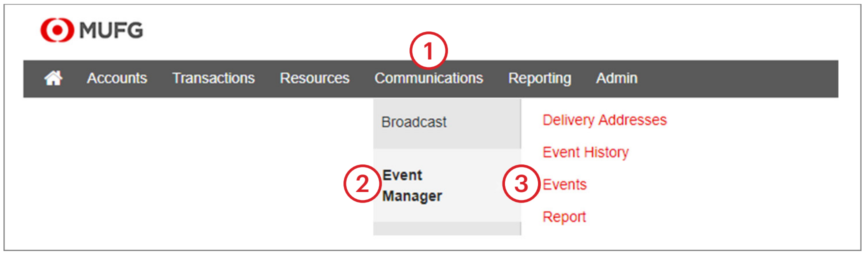
10. Click **Maintenance** to return you to the Events Maintenance screen. The status of this Event will still reflect Active.



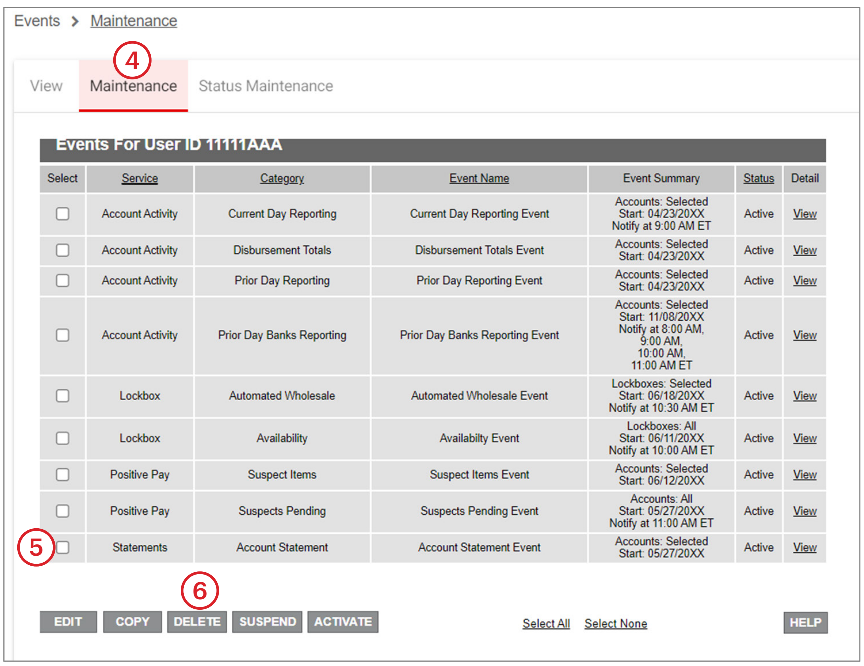
Select	Service	Category	Event Name	Event Summary	Status	Detail
☐	Account Activity	Current Day Reporting	Current Day Reporting Event	Accounts: Selected Start: 04/23/20XX Notify at 9:00 AM ET	Active	View
☐	Account Activity	Disbursement Totals	Disbursement Totals Event	Accounts: Selected Start: 04/23/20XX	Active	View
☐	Account Activity	Prior Day Reporting	Prior Day Reporting Event	Accounts: Selected Start: 04/23/20XX	Active	View
☐	Account Activity	Prior Day Banks Reporting	Prior Day Banks Reporting Event	Accounts: Selected Start: 11/08/20XX Notify at 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM ET	Active	View
☐	Lockbox	Automated Wholesale	Automated Wholesale Event	Lockboxes: Selected Start: 06/18/20XX Notify at 10:30 AM ET	Active	View
☐	Lockbox	Availability	Availabilty Event	Lockboxes: All Start: 06/11/20XX Notify at 10:00 AM ET	Active	View
☐	Positive Pay	Suspect Items	Suspect Items Event	Accounts: Selected Start: 06/12/20XX	Active	View
☐	Positive Pay	Suspects Pending	Suspects Pending Event	Accounts: All Start: 05/27/20XX Notify at 11:00 AM ET	Active	View
☐	Statements	Account Statement	Account Statement Event	Accounts: Selected Start: 05/27/20XX	Active	View

Delete an Event

1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Events** in the Event Manager drop-down menu.



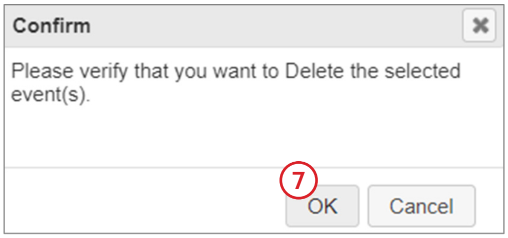
4. Click **Maintenance**.
5. Click the checkbox next to the **Event** that needs to be deleted.
6. Click **Delete**.



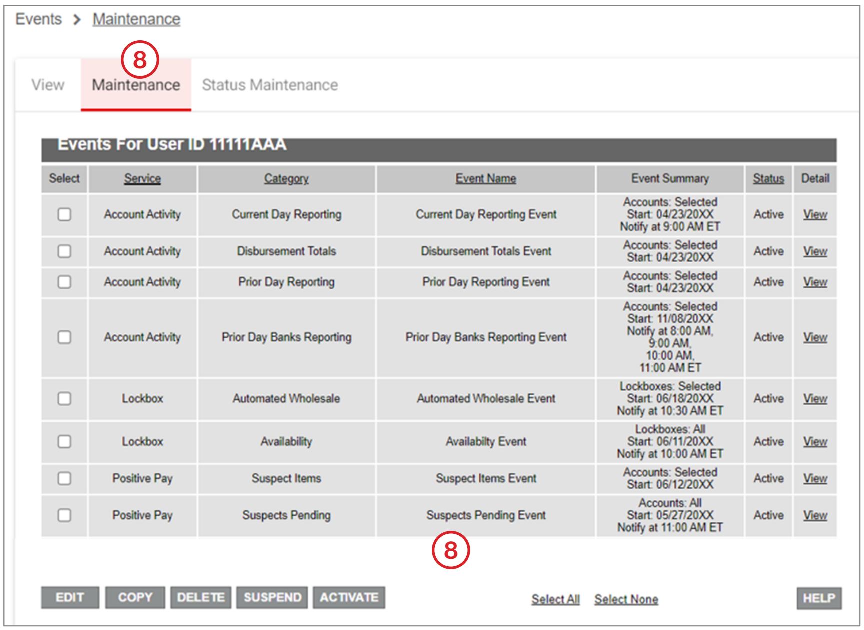
Events For User ID 11111AAA

Select	Service	Category	Event Name	Event Summary	Status	Detail
☐	Account Activity	Current Day Reporting	Current Day Reporting Event	Accounts: Selected Start: 04/23/20XX Notify at 9:00 AM ET	Active	View
☐	Account Activity	Disbursement Totals	Disbursement Totals Event	Accounts: Selected Start: 04/23/20XX	Active	View
☐	Account Activity	Prior Day Reporting	Prior Day Reporting Event	Accounts: Selected Start: 04/23/20XX	Active	View
☐	Account Activity	Prior Day Banks Reporting	Prior Day Banks Reporting Event	Accounts: Selected Start: 11/08/20XX Notify at 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM ET	Active	View
☐	Lockbox	Automated Wholesale	Automated Wholesale Event	Lockboxes: Selected Start: 06/18/20XX Notify at 10:30 AM ET	Active	View
☐	Lockbox	Availability	Availabilty Event	Lockboxes: All Start: 06/11/20XX Notify at 10:00 AM ET	Active	View
☐	Positive Pay	Suspect Items	Suspect Items Event	Accounts: Selected Start: 06/12/20XX	Active	View
☐	Positive Pay	Suspects Pending	Suspects Pending Event	Accounts: All Start: 05/27/20XX Notify at 11:00 AM ET	Active	View
☐	Statements	Account Statement	Account Statement Event	Accounts: Selected Start: 05/27/20XX	Active	View

7. A confirmation message will appear confirming that you want to Delete the selected Event. Click **OK**.

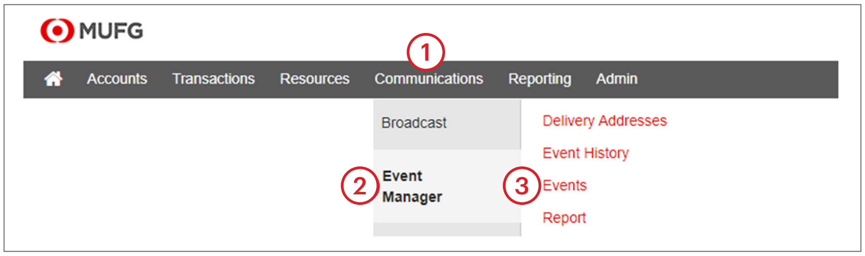


8. Click **Maintenance** to return you to the Events Maintenance screen. The Event will no longer be listed.

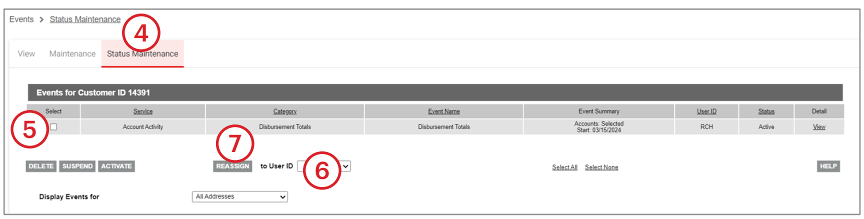


Reassign an Event

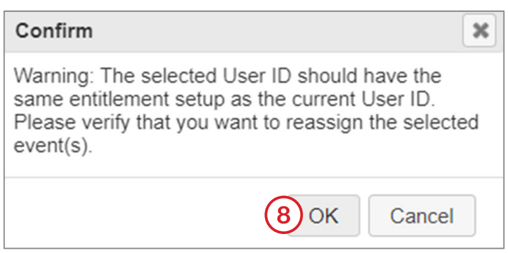
1. Click **Communications** in the Check Manager menu.
2. Choose **Event Manager** in the Communications drop-down menu.
3. Choose **Events** in the Event Manager drop-down menu.



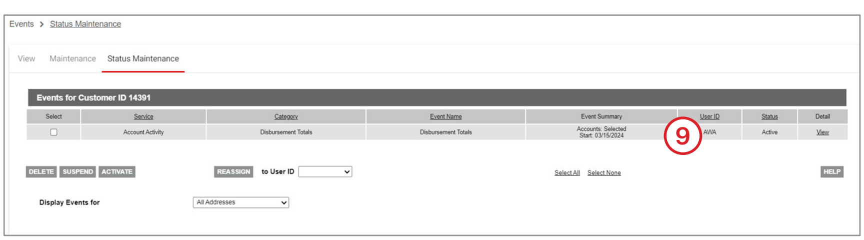
4. Click **Status Maintenance**.
5. Click the checkbox next to the **Event** that needs to be reassigned.
6. Click the to **User ID** drop-down arrow to locate and click the User ID you want to reassign the Event to.
7. Click **Reassign**.



8. A confirmation message will appear confirming that you want to Reassign the selected Event to this user ID. Click **OK**.



9. The Status Maintenance screen is displayed, and you can verify that the Event has been reassigned to the **User ID** selected.



ALERTS APPENDIX

* Asterisk indicated an important Alert that is advised for customers using that service group.

MUFG Exchange — Summary of Alerts by Group and Type		
Alert Type	**Description**	**Customizations Available**
INFORMATION REPORTING ALERTS		
*Transaction Notification	Email is sent when transaction meeting specified criteria is posted. Most commonly used for incoming wire notifications.	• Select account(s) • Select transaction type • Select amount: less than, greater than, in range, equal to • Select debit/credit/both • Specify Customer Reference
*Summary Balance	Email is generated when a specified account balance meets specified criteria.	• Select account(s) • 24: less than, greater than, in range, equal to
PAYMENTS AND TRANSFERS ALERTS		
*Automatically Created	Notifies you of payments automatically created based on scheduled payment settings.	• Select account(s) Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
Transactions Processing Status Changed for Payments and Transfers	Payment status: Approved, acknowledged, confirmed, rejected.	• Select Payment Status(es) (Approved, Bank Acknowledged, Bank Confirmed, Bank Received, Bank Confirmed, Bank Rejected) • Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
File Import Confirmation for Payments and Transfers	Email is sent when payments or transfers are successfully or unsuccessfully uploaded.	None
Processed	Email is sent when payment status is changed to specified status: Received by Bank, Confirmed by Bank, Rejected by Bank. Only available for wires and transfers	• Pay, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
*Payments Awaiting My Approval	Email is generated when a payment is awaiting approval	• Choose between Set Alert Timing or Receive Immediately • If Setting Alert Timing, specify time of day to receive (1 time daily per alert set-up) • Select payment type(s)
Exchange Rate Needed	Email is generated when there are FX Wire payments needing a foreign exchange rate	• Select time prior to cut-off to receive alert (options from 30 min to 4 hours prior) • Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
Rejected Today	Email is generated when a payment(s) is rejected	• Select account(s) • Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to

MUFG Exchange — Summary of Alerts by Group and Type		
Alert Type	**Description**	**Customizations Available**
*Payment Cutoff Time Warning	Email is sent when payments or transfers are within a specified time prior to a cutoff time.	• Choose between Set Alert Timing or Receive Immediately • If Setting Alert Timing, specify time of day to receive (1 time daily per alert set-up) • Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
Approval Window Passed	Email is sent when transactions were not approved prior to the cutoff time. The value date needs to be adjusted to a valid business day and resubmitted for approval in order to be processed.	• Choose between Set Alert Timing or Receive Immediately • If Setting Alert Timing, specify time of day to receive (1 time daily per alert set-up) • Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
ACH Payment Released	Email is generated when an ACH payment has been released.	• Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
Templates Awaiting My Approval	Email is sent when a template or templates is in entered status and awaiting approval: Time, payment type.	• Choose between Set Alert Timing or Receive Immediately • If Setting Alert Timing, specify time of day to receive (1 time daily per alert set-up) • Select payment type(s)
Approver Rejected	Notifies you of any payments rejected during the approval process.	• Specify time of day to receive alert (1 time daily per alert set-up) Select payment type(s) • Specify debit amount: less than, greater than, in range, equal to • Specify credit amount: less than, greater than, in range, equal to
ADMINISTRATION ALERTS		
*Role Maintenance	Email is generated when a Role is added, modified, approved, or deleted.	Choose action(s): Add, Modify, Delete, Approve
*User Alert	Email is generated when a user is added, modified, approved, or deleted.	Choose action(s): Add, Modify, Delete, Approve
Beneficiary Address Book Maintenance	Email is generated when a Beneficiary is added, modified, approved, or deleted within the Beneficiary Address Book	Choose action(s): Add, Modify, Delete, Approve
UTILITIES ALERTS		
*Quick Report Received	Email is generated when a new Legacy Report meeting specified criteria is made available	• Choose Legacy Report ID(s) • Legacy Report IDs to which the user is entitled will appear on drop-down list, user can multi-select
CHECK MANAGEMENT ALERTS		
File Import confirmation for Stops and Cancel Stop Payments	Email is generated when a file of Stop Payments or Cancel Stop Payments is imported.	None

MUFG Exchange — Summary of Alerts by Group and Type		
Alert Type	**Description**	**Customizations Available**
PAYMENT AUTOMATION ALERTS		
Successful File Import via Payment Automation	Email is generated when payment file is successfully imported via Payment Automation.	None
Failed Successful File Import via Payment Automation	Email is generated when payment file is successfully imported via Payment Automation	None
ACCOUNT ACTIVITY		
AcctActivity — Current Day	Provides a notification of your available account balance	• Select accounts • Select start date • Select end date • Select up to four (4) times to be alerted or frequency of reporting • Choose to include all details for the day or only details since the last time reported • Choose to include US Holidays and/or Sundays and/or exclude Fridays • Choose to be notified only when total balance is under or over a specified amount • Choose from Summary Balance, Detailed Balance, or Customer report • Minimum detail amount is optional • Choose the type codes to be included • Choose to include Check Detail or not • Choose to include ACH Addenda or not
AcctActivity — Disbursement Totals	Provides a notification when current day First and/or Second Presentment Totals have been updated	• Select accounts • Select start date • Select end date • Notify when 1st and/or 2nd present totals are available • Choose Summary or Detail Balance • Choose include Check Detail • Choose include ACH Addenda
AcctActivity — Prior Day	Generates a notification when prior day files have been updated	• Select accounts • Select start date • Select end date • Choose from Summary Balance, Detailed Balance, or Customer report • Minimum detail amount is optional • Choose the type codes to be included • Choose to include Check Detail or not • Choose to include ACH Addenda or not
AcctActivity — Prior Day Banks	Generates a notification when prior day files either have or have not reported prior day data by a specified timeframe.	• Select accounts • Select start date • Select end date • Select up to four (4) times to be alerted • Choose to Sundays and/or exclude Fridays • Choose to include selections that have reported and/or selections that have not reported

MUFG Exchange — Summary of Alerts by Group and Type		
Alert Type	**Description**	**Customizations Available**
LOCKBOX		
LBX — Automated Wholesale	Provides a notification of lockbox activity based on your selection of a designated time or any time there is activity	• Select lockboxes • Select start date • Select end date • Time to be notified • Choose to be notified at each update or not • Hold messages until specified time • Current Day or Prior Day • Specify low check amount • Specify high check amount • Specify the report sorting by field • CSV Option by check or invoice number
LBX — Availability	Provides a notification at a designated time letting you know whether or not your company has activity	• Select lockboxes • Select start date • Select end date • Notify at a specific time • Choose to be notified at each update or not • Hold messages until specified time • Current Day or Prior Day • Specify low check amount • Specify high check amount • Specify the report sorting by field • CSV Option by check or invoice number
POSITIVE PAY		
*PosPay — Suspect Items	Notification each day indicating if you have suspect items that day.	• Select accounts • Select start date • Select end date • Hold messages until specified time • Stop messages at a specified time
*PosPay — Suspects Pending	Notification is generated each day at a designated time letting you know if suspect items are pending action or pending approval.	• Select accounts • Select start date • Select end date • Notify at a specific time • Choose if notification is for decisions pending action or decisions pending release
STATEMENTS		
Statements — Account Statement	Event Manager delivers the Account Statement whenever it's available for the current month, and the report tis saved in Event History.	• Select accounts • Select start date • Select end date

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DELIVERY OPTIONS APPENDIX

Available Delivery Options:

- **Generic Message** is a notification which states that either you have items matching event criteria or you do not. For example, "There are no returned items for this transmission matching the selection parameters" — no account or event information is specified.
- **Notice** is basically, the same as generic message, but it displays masked account numbers and offers a little more specific information regarding the event. For example, "The following accounts have suspect items Pending Release: PGH ****123, PGH ****456".
- **Report**: using the **FAX method** is the actual detailed event data presented in report format. A Report event is limited to the reporting criteria that the service itself offers through the actual reporting function. The Report events contain the same report headers that are generated in the existing service reporting function and the data is formatted the same as well. Some reports with a lot of data may be too large for email boxes with message/text size limits assigned to them; therefore, an **Email Report** (and the email Detailed Notice) event will produce a link which the customer can access (by logging in with Customer ID and password) to view the report through their internet browser instead of directly in their email. PDF is used to download a text version of the report. A **Simple Repor**t has a 10,000 line maximum. An **Advanced Report** can contain more lines of information.
- **PDF** emails the user a hyperlink which directs them back to the web page to be authenticated. At that point, the report is pulled from the Event Manager repository and converted into a PDF.