

- ◆ **LOGGING IN**
 - ◆ Log in to <https://netconnect.bokf.com>
 - ◆ Select *Alerts* from the drop-down menu

- ◆ **Setting Up CONTACT POINTS**
 - ◆ Select the *Alerts* tab at the top of the page
 - ◆ On the *Setup Contact Points* page, select the *Time Zone* you prefer from the drop-down menu
 - ◆ Under the *Standard Contact Points* section:
 - ◆ Clear the contact point information if pre-filled
 - ◆ Enter the requested information in the contact fields for which you would like to receive alerts, i.e. work phone, mobile phone, email, fax number
 - ◆ Click the *Test* hyperlink to verify the contact point is working correctly
 - ◆ Select the times you prefer to receive or not receive notifications in the *Quiet Times* column
 - ◆ Click *Next* to be forwarded to the *Alerts Menu* to set up an Alert

- ◆ **ADDING an Alert**
 - ◆ Select the *Alerts* tab at the top of the page followed by *Setup Alerts*
 - ◆ Click *Add New Alert* or edit an existing alert
 - ◆ To edit an existing Alert, select the *Edit* button near the notification type
 - ◆ To add a new alert, select the type of Alert you would like to set up and click the *Add* button
 - ◆ Enter the requested information and click *Save*
 - ◆ From this point, you may repeat the steps above or add additional Alerts by clicking the *Add Another...* hyperlink located at the top of each Alert section

- ◆ **Editing a CURRENT Alert**
 - ◆ Select the *Alerts* tab at the top of the page followed by *Setup Alerts*
 - ◆ Click the *Edit* hyperlink located to the right of the alert to be modified
 - ◆ Make requested changes and click *Update*

- ◆ **Adding a SAME DAY ACCOUNT ACTIVITY Alert**
 - ◆ Click the *Add* button under the *Account Activity Notification* section on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by the *Account Numbers* for which you would like the notification
 - ◆ Select the type of *Transactions* you prefer
 - ◆ Select a *Threshold* option from the drop-down menu
 - ◆ Select your *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Adding a PREVIOUS DAY ACCOUNT BALANCE Alert
 - ◆ Click the *Add* button under the *Account Balance Notification* section on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by the *Account Numbers* for which you would like the notification
 - ◆ Under *Transactions*, select either *Account Balance* or *Account Statistic* based on your preference
 - ◆ Click on the next drop-down menu and highlight the type of information you would like
 - ◆ Select a *Threshold* followed by a dollar amount
 - ◆ Select your *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Adding an ACH BATCH APPROVAL NEEDED Alert
 - ◆ Click the *Add* button under *ACH Batch Approval Needed* on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by your preferred *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Adding a MONEY TRANSFER APPROVAL REQUIRED Alert
 - ◆ Click the *Add* button under the *Money Transfer Approval Required Notification* section on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by the *Account Number(s)* from which you would like notification
 - ◆ Select your preferred *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Adding a MONEY TRANSFER SENT Alert
 - ◆ Click the *Add* button under the *Money Transfer Sent Notification* screen on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by the *Account Number(s)* from which you would like notification
 - ◆ Select a *Threshold* option followed by a dollar amount
 - ◆ Select your preferred *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Adding a POSITIVE PAY EXCEPTIONS Alert
 - ◆ Click the *Add* button under the *Positive Pay Exception Notifications* section on the *Setup Alerts* screen
 - ◆ Enter the *Alert Name* followed by the *Account Number(s)* from which you would like notification
 - ◆ Select your preferred *Delivery Method(s)*
 - ◆ Click *Save*

- ◆ Reviewing ALERTS HISTORY
 - ◆ Click the *Alert History* button at the top of the *Alerts* tab page
 - ◆ To view a specific Alert, click on the hyperlink under the *Alert* column
 - ◆ After viewing the Alert, you may click *Delete* to remove the Alert permanently, or *Back* to return to the previous screen