REAL-TIME ALERTS SETUP GUIDE

partners bank of california

(866) 323-2741

pbofca.com

partners bank of california

REAL-TIME ALERTS SET UP GUIDE

If you would like more information about Real-Time Alerts notifications, or if you require assistance with enrolling, please contact our Treasury Management team at tm@pbofca.com.

ESTABLISHING ALERTS

To establish an Alert, you must enroll in Alerts and then for all subsequent Alerts, you only have to define Alert options.

To enroll in Alerts

1. Log on to Online Banking (Business or Personal platform instructions are the same). The system displays Online Home page.
2. Click **Enroll**. The system displays the Enrollment page.
3. Specify how you would like to see your Alerts. You can choose to receive Alerts through email, text message, or both and you can also set up Do Not Disturb options for your Alerts:

To receive Alerts by email and set up Do Not Disturb options for these emails, complete steps a-e:
a. In the Email section, click **Add Email** and specify your email address.
b. Click **Send Activation Code**. The system sends an activation code to the email address that you defined and then it displays a message confirming that it has sent the activation code.
c. Type the activation code that you received in the **Activation Code** field and click **Activate**. The system confirms that it has activated the email address and that the email address is ready for the program to use.
d. To set up Do Not Disturb options, click **Setup**. The Do Not Disturb Options box appears.
e. Specify the **Start Time**, **End Time**, and **Time Zone** values and click **Save**.

To receive Alerts by text message and set up Do Not Disturb options for these text messages, complete steps a-e:
a. In the Text Message section, click **Add Mobile** and specify your mobile number.
b. Click **Send Activation Code**. The system sends an activation code to the mobile number that you defined and then it displays a message confirming that it sent the activation code.
c. Type the activation code that you received in the **Activation Code** field and click **Activate**. The system confirms that it has activated the mobile number and the mobile number is ready for by the program to use.
d. To set up Do Not Disturb options, click **Setup**. The Do Not Disturb Options box appears.
e. Specify the **Start Time**, **End Time**, and **Time Zone** values and click **Save**.

4. Repeat step 3 to establish Alerts for additional email addresses and mobile numbers.

5. Click **Next** to save your contact options. The system displays the Alert Options page.
Note: To delete a contact option, click the **Delete** button and then click OK on the resulting page. The system displays a message confirming the deletion.

REAL-TIME ALERTS SET UP GUIDE

To set up Alert options

1. Locate the Alert category to set up an Alert.

Note: The list of Alerts in an Alert category changes based on the Alerts that you have access to.

2. Expand an Alert category to view all of the Alerts available for that category.

3. Subscribe to an Alert and select your delivery preferences for receiving the Alert.

4. Click **Save** to save your Alerts. The system displays a confirmatory message that it saved the Alert subscription.

5. Click **Next** to complete the initial setup. The system displays the Overview tab with the updated active Alert.

VIEWING ALERTS

You can view subscribed Alerts in the Secure Inbox on the Home page. You can also view all the triggered Alerts on the Sent Alert page based on the preferences that you defined.

To view triggered Alerts on the Home page

If you have permissions and have elected to receive Alerts on the Online Home page, perform the following steps to view your Alerts.

1. Sign on to Online Banking. The system displays the Online Home page.

Note: The Secure Inbox section located on the Home page displays the last three Alerts that you selected to send to the Secure Inbox. The system lists the Alert type, account type, account number, and Alert details in the Secure Inbox.

2. Click **Mark as read** after reading an Alert to close it. The Secure Inbox refreshes to display a new Alert in the list.

To view triggered Alerts on the sent Alert page of the program

You can view triggered Alerts on the Sent Alert page.

1. Sign on to Online Banking. The system displays the Online Home page.

2. Click the **Manage** link at the top of the Secure Inbox.

Or

Select the **Alerts** option from the Account Services list.

Or

Click the **Go to all Alerts** link at the bottom of the Secure Inbox. The system displays the Sent Alerts page.

Note: The Sent Alerts page displays the triggered Alerts with the date, Alert type, and Alert details.

3. Click **Mark As Read** on the Alert to indicate that you have viewed it. The **Mark as Read** button name changes to **Mark As Unread**.

Note: Clicking the **Mark As Unread** button again changes the button name to **Mark as Read.**

4. Click **Mark All As Read** to label all Alerts in the list as read.

5. Click **View More Alerts**. The system refreshes the page displaying additional Alerts that you have elected to receive.

partners bank of california

REAL-TIME ALERTS SET UP GUIDE

EDITING ALERTS

You can edit Alerts on the Overview and the Alert Options pages of the program.

To edit an Alert on the Overview page

1. Sign on to Online Banking. The system displays Online Home page.
2. Click the **Manage** link at the top of the Secure Inbox.
Or
Select the **Alerts** option from the Account Services list.
Or
Click the **Go to All Alerts** link on the bottom of the Secure Inbox.
The system displays the Sent Alerts page.
Note: The Sent Alerts page displays the triggered Alerts with the date, Alert type, and Alert details.
3. Click the **Overview** tab to access the Overview page and view the list of active Alerts on your account.
4. Click **Edit** for the Alert you need to edit.
5. Specify the new values and save the changes.
Note: If you clear all of the check boxes or the **Sent Alert To** check box, the system no longer displays the Alert on the Overview page.

To edit an Alert on the Alert Options page

1. Sign on to Online Banking. The system displays Online Home page.
2. Click the **Manage** link at the top of the Secure Inbox.
Or
Select the **Alerts** option from the Account Services list.
Or
Click the **Go to all Alerts** link on the bottom of the Secure Inbox on the Home page. The system displays the Sent Alerts page.
Note: The Sent Alerts page displays the triggered Alerts with the date, Alert type, and Alert details.
3. Click the **Alert Options** tab to access the Alert Options page and view the list of active Alerts on your account.
4. Specify the new values and save the changes.
Note: If you clear all of the check boxes or the **Sent Alert To** check box, the system no longer displays the Alert on the Overview page.

REAL-TIME ALERTS SET UP GUIDE

DELETING ALERTS

You can delete Alerts on the program. You can also delete triggered Alerts on the Sent Alert page.
Note: To delete a contact option, click the **Delete** button and then click **OK** on the resulting page. The system displays a message confirming the deletion.

To delete active Alerts

1. Sign on to Online Banking. The system displays Online Home page.
2. Click the **Manage** link at the top of the Secure Inbox.
Or
Click on the **Alerts** option on the Account Services list.
Or
Click on **Go to all Alerts** link at the bottom of the Secure Inbox.
The system displays the Sent Alerts page.
Note: The Sent Alerts page displays the triggered Alerts with the date, Alert type, and Alert details.
3. Click the **Overview** tab to display the Overview page and view the list of active Alerts on your account.
4. Click **Delete** for the Alert that you need to delete and the click **OK** in the resulting options box. The system a message confirming the deletion.

To delete triggered Alerts

1. Sign on to Online Banking. The system displays Online Home page.
2. Click the **Manage** link at the top of the Secure Inbox.
Or
Click on the **Alerts** option on the Account Services list.
Or
Click on **Go to all Alerts** link at the bottom of the Secure Inbox. The system displays the Sent Alerts page.
Note: The Sent Alerts page displays the triggered Alerts with the date, Alert type, and Alert details.
3. Click **Delete** for the Alert you want to delete.
4. To delete all the Alerts that the system displays in the list, click **Delete All** and click **OK** in the resulting options box. The system displays a message confirming the deletion.
Note: The **Delete All** button does not delete the Alerts that the system does not display on the Sent All page. After you delete the Alerts that the system displays, the page refreshes to list next set of Alerts.