



# e-Treasury/Web-Link Migration Alert Comparison

## User Options & Report Differences

July 10, 2023





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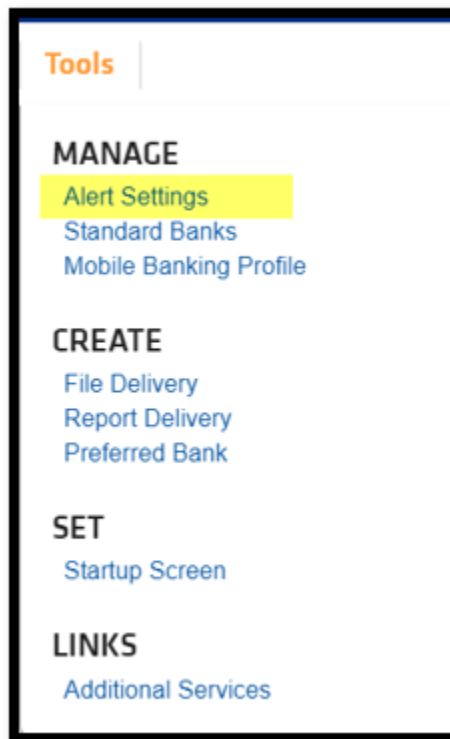
## Overview

To facilitate the migration of Webster clients to e-Treasury, this document details differences between Web-Link's Alerts and e-Treasury's Alerts. Illustrations include user options for this feature.

## Alerts Overview

Alerts allow for notifications to be sent to a company's users in the event payments meet specific circumstances. They are customizable based upon needs and awareness.

Web-Link's Alerts is the equivalent of e-Treasury's Alerts.





## e-Treasury: Alerts

Choose **Alerts** under the **Account Information** Tab.

The screenshot shows the e-Treasury dashboard with the 'ACCOUNT INFORMATION' tab selected. The 'Alerts' option is highlighted in yellow under the 'CHECKING' group. The main content area displays a table of account balances as of Jun 8, 2023 9:46 AM EDT.

Id	Amount	Current Available Balance	Current Ledger Balance
	0.00	86.51	292.38
*414	0.00	-10.84	-10.84
*23456	0.00	0.00	97.35
*23458	0.00	0.00	0.00

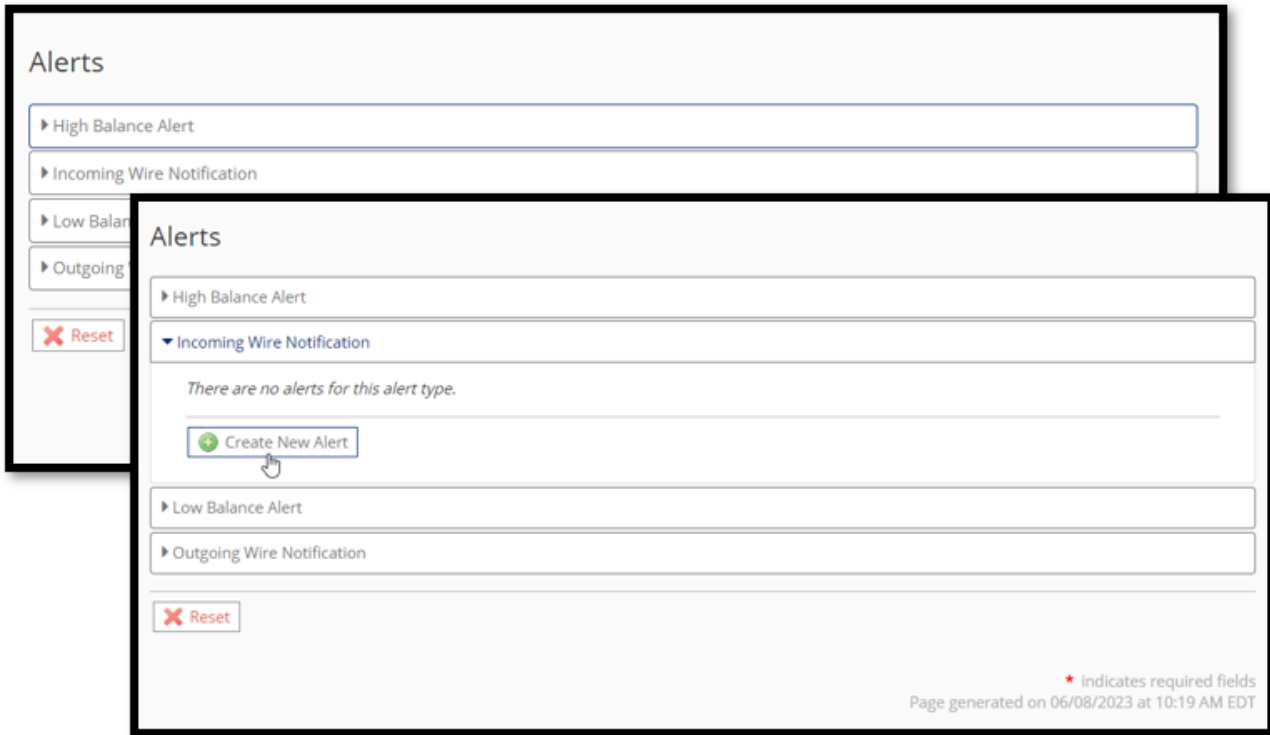
The 'Action Center' on the right shows 7 Expired Payments and 0 Users Locked Out.

Select from 4 types of Alerts:

- **High Balance Alert** – a notification will be sent if the Current Ledger Balance is greater than or equal to the amount entered.
- **Low Balance Alert** - a notification will be sent if the Current Ledger Balance is less than or equal to the amount entered.
- **Wire Transfer Credit Advice** – a notification will be sent based upon incoming money transfers greater than or equal to the amount entered.
- **Wire Transfer Debit Advice** – a notification will be sent based upon outgoing money transfers greater than or equal to the amount entered.

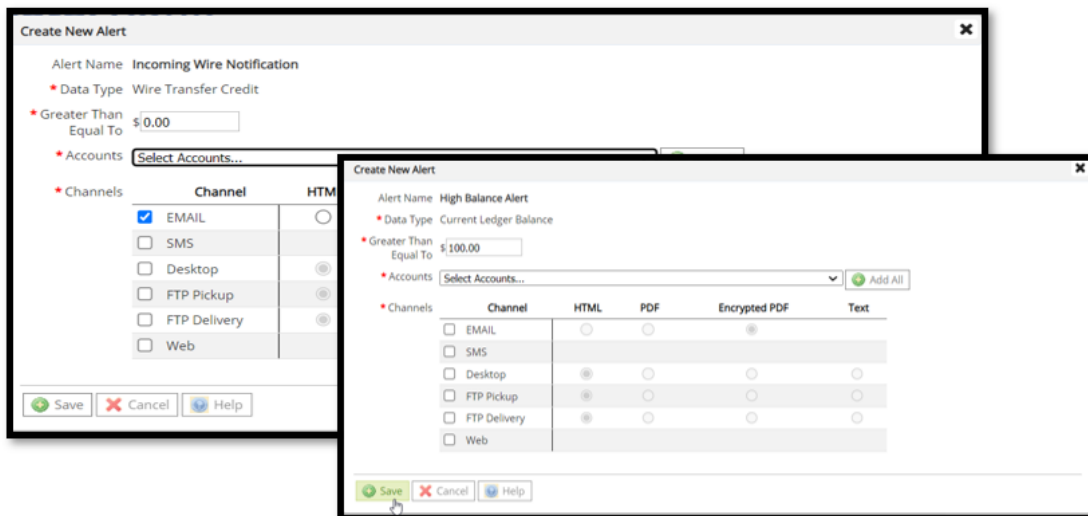


Select the Alert type and click on **Create New Alert**.



Enter in your **Greater Than Equal To** amounts.

Choose your **Accounts**, and the **Channel(s)** to receive your Alert. Channels include email, SMS, Desktop, FTP Pickup, FTP Delivery, and Web. Once all preferred Channels are selected, click **Save**.





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