

Business Banking Anywhere

Do all your everyday banking, quickly, easily and safely.

Learn how to Select and Manage Alerts

Small Business Online Banking



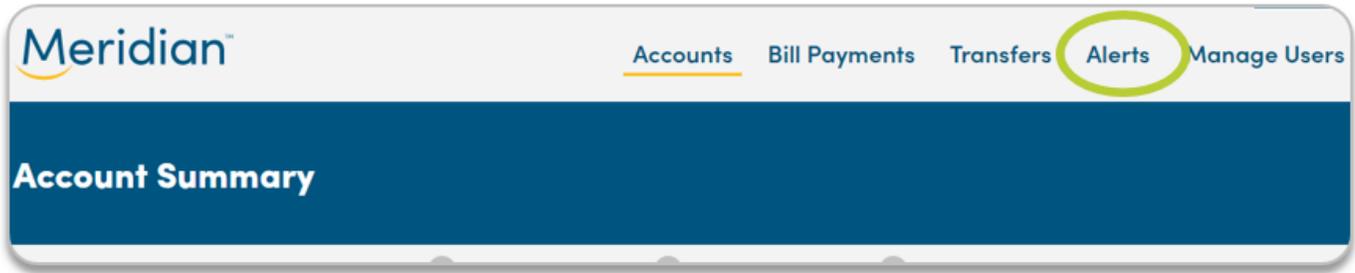
Online Guide

For more ways to bank from home, visit:
www.meridiancu.ca/businessbankanywhere

MeridianTM
Where banking feels good.

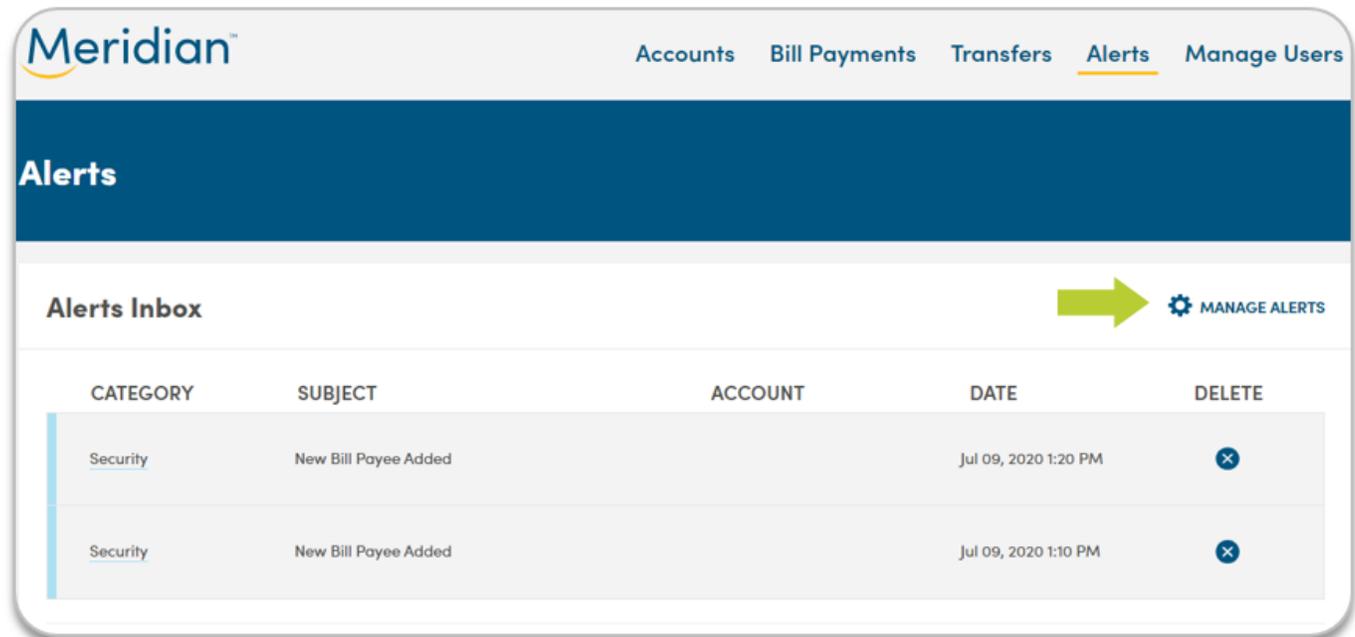
Step 1: Go to the Alerts tab

Once you have signed in to online banking, select the *Alerts* tab.



Step 2: Setup Alerts

You will be brought to your *Alerts* inbox.
To setup alerts, click on *Manage Alerts*.



You will land on the **Alerts** page where you can setup preferences on how you wish to be notified of account activities, as well as setup specific alerts for account access or updates (security), transactions, and account balances.

Alerts

To select and manage your Alerts, simply switch the category toggles below ON/OFF or choose the individual alerts that cater to your needs.

Alert Preferences EDIT

Email to: [Add an email address](#)

Mobile App: [Subscribe a device via the "Settings" menu on our Mobile App](#)

Alert Inbox: A copy of each alert sent can be found in your Alert Inbox.

Security Alerts OFF

Security alerts help protect you against unauthorized access to your accounts and other potentially fraudulent behaviours. These include your account being locked, password being reset or when your contact information changes. **Recommended.**

Show/Edit Alerts *

You must select an account to enable Transaction and Account Balance Alerts:

[Day to Day Business Expenses](#)

Transaction Alerts OFF

Take control of your finances by tracking debit card transactions over a set amount, knowing when your paycheque arrives or when a cheque you deposited doesn't go through – plus much more!

Show/Edit Alerts *

Account Balance Alerts OFF

Know when your account balance is low or overdrawn.

Show/Edit Alerts *

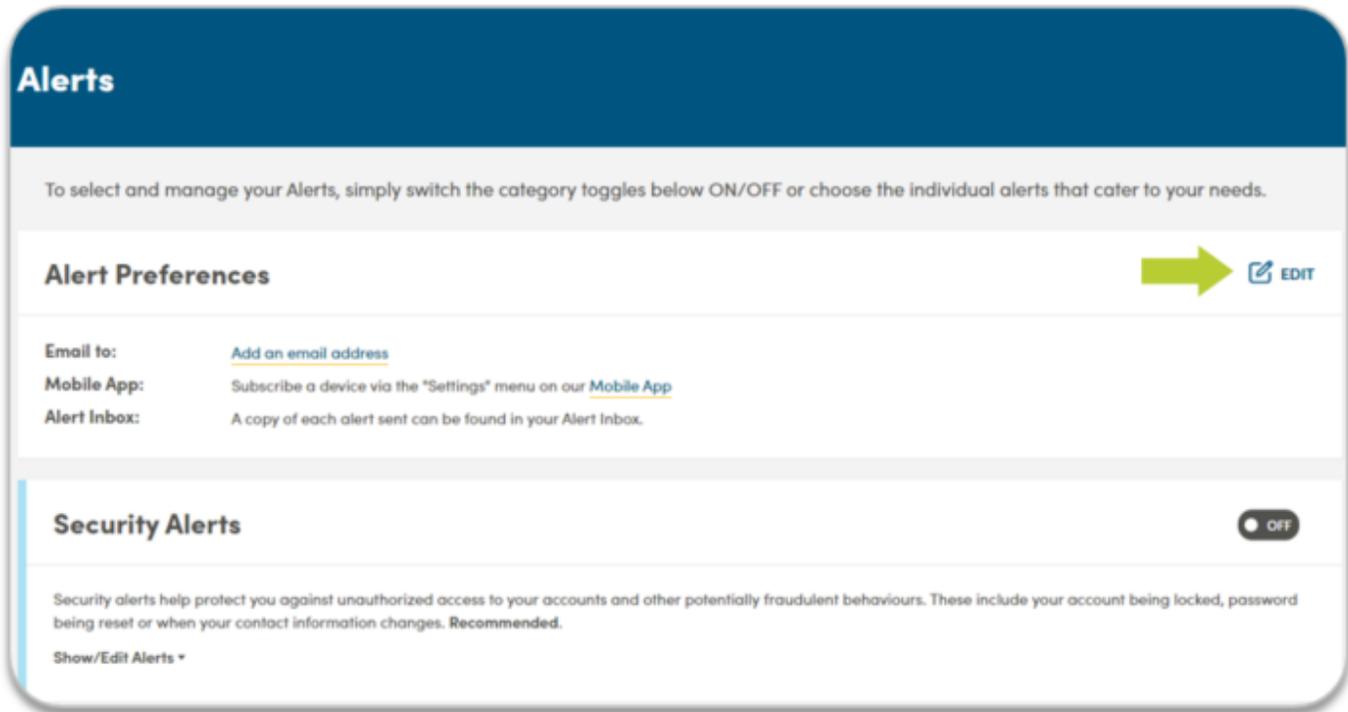
[BACK](#) [SAVE](#)

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Step 3: Setup Alert Preferences

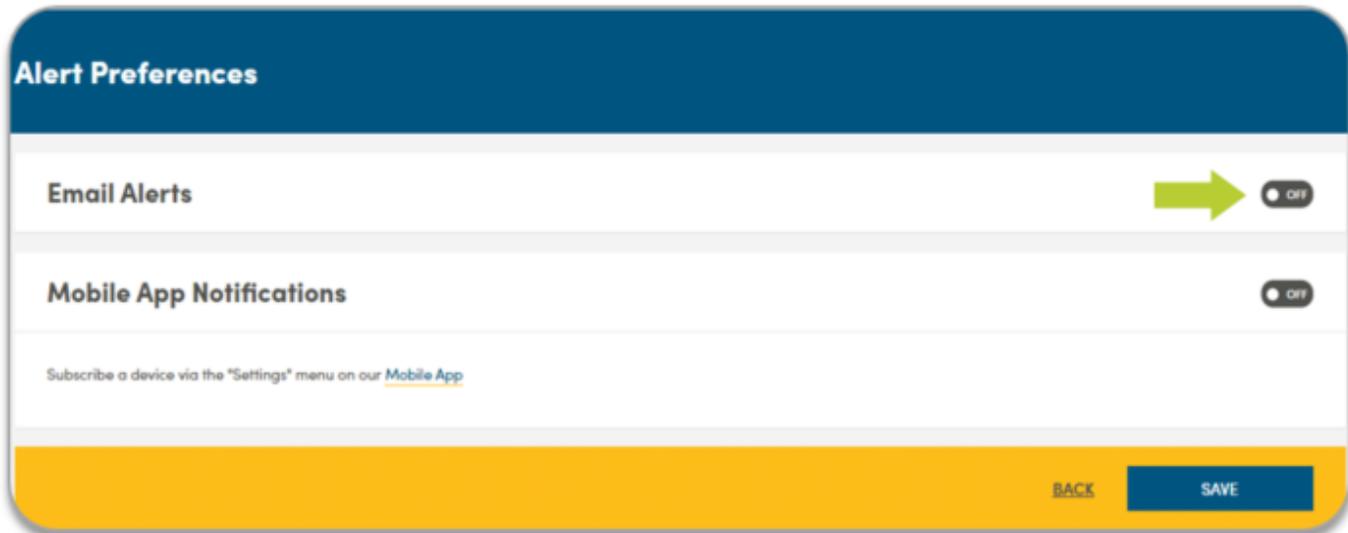
Click on the *Edit* button.

Note: Mobile App notifications cannot be completed online and must be completed through the Small Business Online Banking Mobile App only.



The screenshot shows the 'Alerts' page. At the top, there is a blue header with the word 'Alerts' in white. Below the header, a grey box contains the text: 'To select and manage your Alerts, simply switch the category toggles below ON/OFF or choose the individual alerts that cater to your needs.' The main content area is divided into sections. The first section is 'Alert Preferences', which includes three rows: 'Email to:' with a link 'Add an email address', 'Mobile App:' with a link 'Subscribe a device via the "Settings" menu on our Mobile App', and 'Alert Inbox:' with the text 'A copy of each alert sent can be found in your Alert Inbox.' To the right of this section is a green arrow pointing to an 'EDIT' button. The second section is 'Security Alerts', which has a toggle switch set to 'OFF'. Below this section is a paragraph of text: 'Security alerts help protect you against unauthorized access to your accounts and other potentially fraudulent behaviours. These include your account being locked, password being reset or when your contact information changes. Recommended.' and a link 'Show/Edit Alerts *'.

Toggle the e-mail alerts from OFF to *ON*.



The screenshot shows the 'Alert Preferences' page. At the top, there is a blue header with the text 'Alert Preferences' in white. Below the header, the page is divided into sections. The first section is 'Email Alerts', which has a green arrow pointing to a toggle switch set to 'OFF'. The second section is 'Mobile App Notifications', which has a toggle switch set to 'OFF'. Below these sections is a paragraph of text: 'Subscribe a device via the "Settings" menu on our Mobile App'. At the bottom of the page, there is a yellow bar with a 'BACK' button and a 'SAVE' button.

Enter your *preferred email address* to receive alerts, then navigate to the bottom of the page to click on the *Save* button.

Email Alerts ON

Enter your email address to receive alerts
digitalbanking@meridiancu.ca

Important: "Phishing" is a scam where someone sends you a fraudulent email that appears to come from Meridian in an effort to gain access to your personal and financial information. Being able to recognize phishing emails can help prevent you from becoming a victim. [Learn how to protect yourself.](#)

Mobile App Notifications OFF

Subscribe a device via the "Settings" menu on our [Mobile App](#)

BACK SAVE

A confirmation message will appear.
Navigate back to the *Alerts* page by clicking on the *Back* button.

✓ Changes have been successfully saved!

Email Alerts OFF

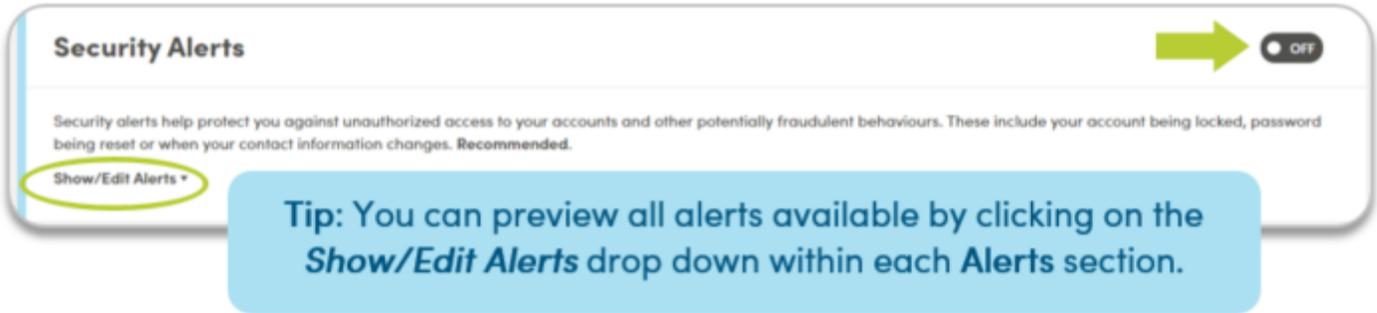
Mobile App Notifications OFF

Subscribe a device via the "Settings" menu on our [Mobile App](#)

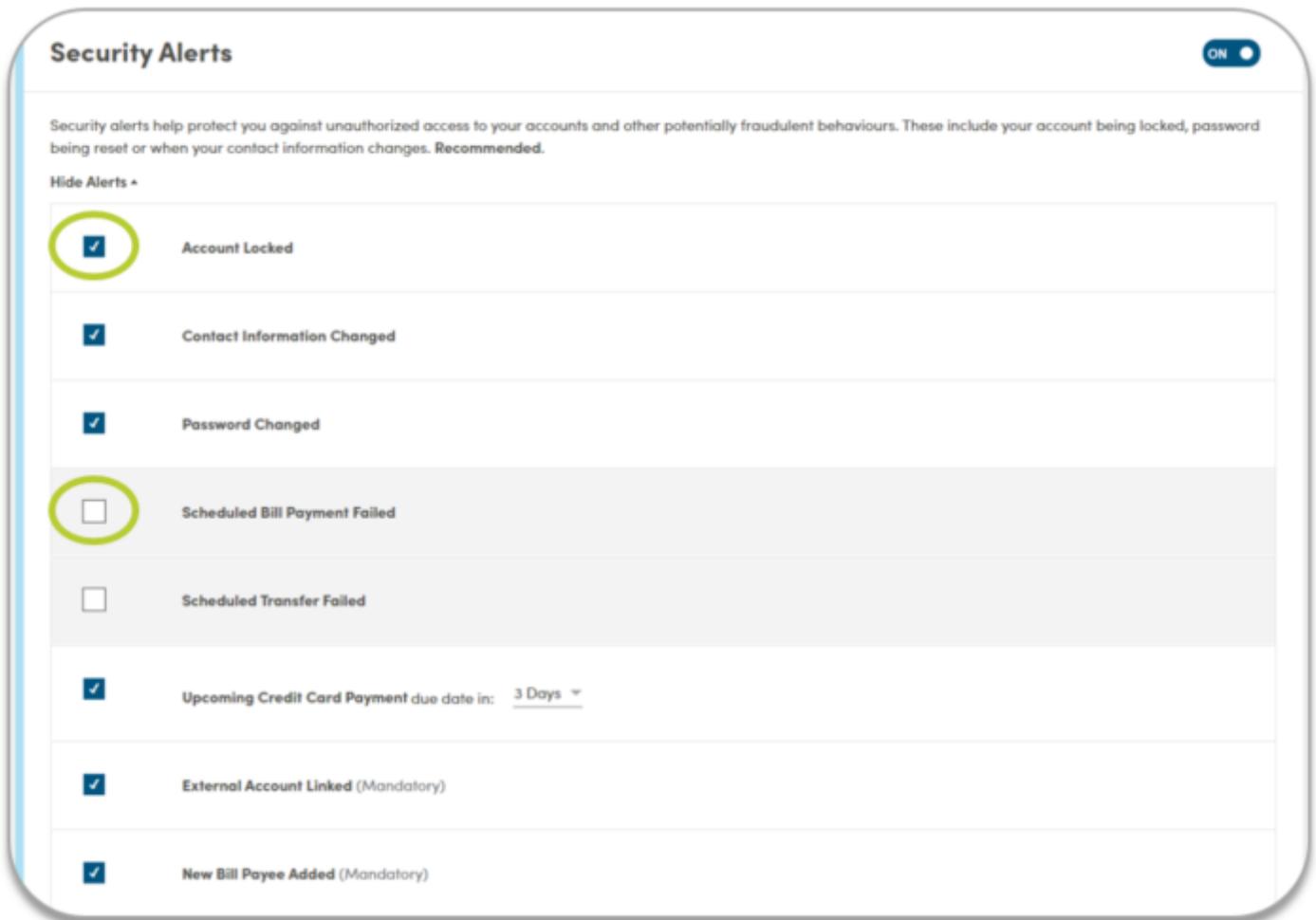
BACK SAVE

Step 4: Setup Security Alerts

Toggle the OFF button to **ON** to show all available security alert options.



Select which alerts you wish to setup by clicking on the individual boxes to add a **checkmark** next to each alert type. If you wish to remove an alert, click on the checkmark again to de-select the alert.



Once complete, scroll down to the bottom of the page and click on the **Save** button.



Step 5: Setup Transaction Alerts

Select an **account** from the drop down menu to setup Transaction and Account Balance alerts.

Repeat the process of toggling the OFF button to **ON** to show all available transaction alert options and select alerts to setup with a **checkmark** next to each alert type.

For transactions alerts, there are additional modifications you can add to specific transaction types below to create alerts based on specific monetary values or upcoming dates.

You must select an account to enable Transaction and Account Balance Alerts:

Day to Day Business Expenses ▾

Transaction Alerts

Take control of your finances by tracking debit card transactions over a set amount, knowing when your paycheque arrives or when a cheque you deposited doesn't go through – plus much more!

Hide Alerts +

- Bill Payment has been submitted through Online Banking.
- Bill Payment Reversal has been submitted through Online Banking.
- Debit Card Transaction is greater than or equal to: \$ 100.00
- Direct Deposit is greater than or equal to: \$ 100.00
- Failed Deposit such as a cheque, fails to clear and funds are reversed.
- Insufficient Funds resulted in a failed cheque or pre-authorized debit
- Mobile Cheque Deposit is made from Meridian's mobile banking app.
- Returned Purchase and a refund has been issued to your account.
- Upcoming Bill Payment coming out of your account in: 3 Days ▾
Send alert when: Scheduled amount exceeds funds available ▾
- Upcoming Transfer coming out of your account in: 3 Days ▾

Note: Includes all Meridian mortgages, loan and line of credit payments.

Note: It is recommended to setup alerts for each and every account you have in your online banking.

Once complete, scroll down to the bottom of the page and click on the **Save** button.



Step 6: Setup Transaction Alerts

Again, repeat the process of toggling the OFF button to **ON** to show all available account balance alert options and select alerts to setup with a **checkmark** next to each alert type.

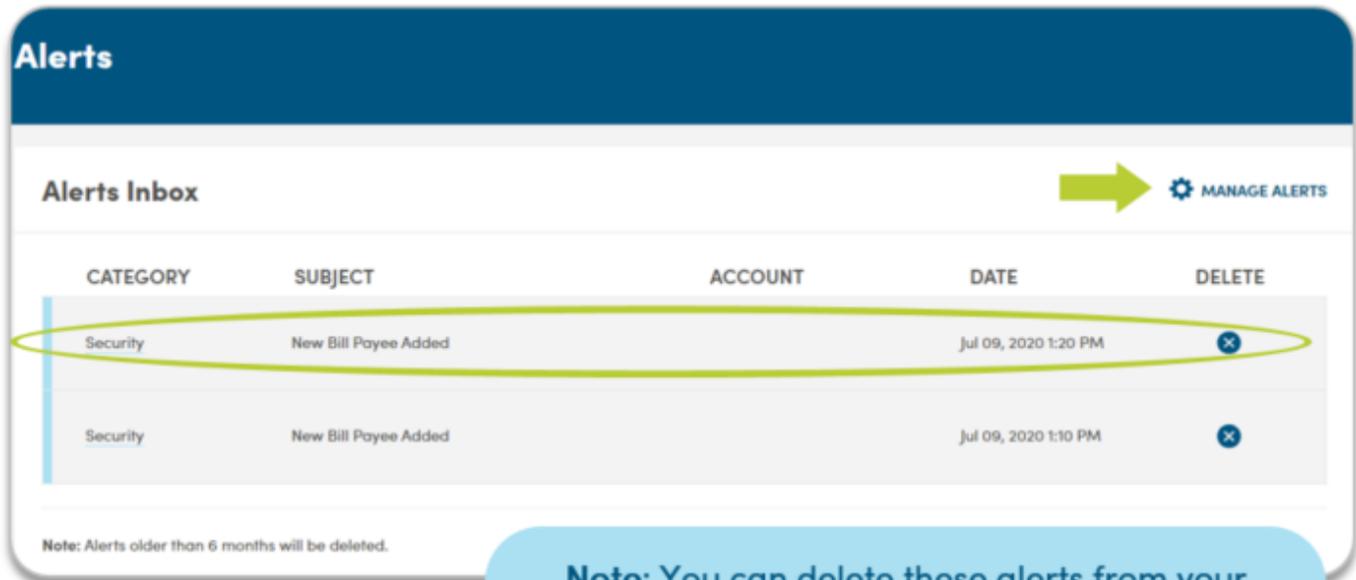
Once complete, click on the **Save** button.



Step 7: Manage Alerts

In the *Alerts Inbox*, notifications are displayed based on the activities performed within your online banking that match with the alerts that you have setup within your online banking.

This can be modified at any time by clicking on the *Manage Alerts* button and updating your preferences and alert notifications using the steps above.



CATEGORY	SUBJECT	ACCOUNT	DATE	DELETE
Security	New Bill Payee Added		Jul 09, 2020 1:20 PM	
Security	New Bill Payee Added		Jul 09, 2020 1:10 PM	

Note: Alerts older than 6 months will be deleted.

Note: You can delete these alerts from your inbox at any time using the *Delete* button. Alerts older than 6 months are automatically deleted from the Alerts inbox. A record of activities are always accessible through your *Settings*.