

How To:

Subscriptions & Alerts

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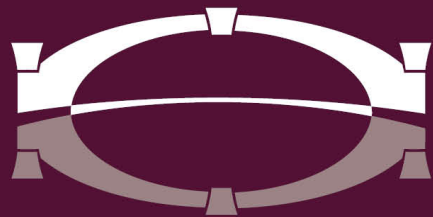
Modifying Subscription Preferences

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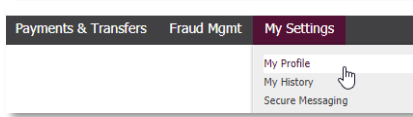
Recommended Subscriptions



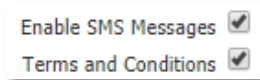
BRIDGEWATER BANK

Enrolling in Text Message Notifications

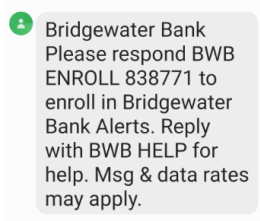
1. Log into The Bridge and go to **My Settings > My Profile**.



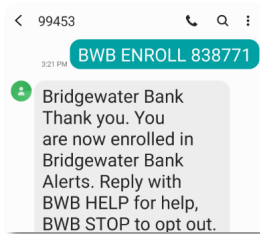
2. Confirm your email address and Message Enabled Cell Phone Number are correct.
 - If they are blank or need to be updated – make the changes on this page. *Administrative users will need to contact the bank to have this information updated.*
3. If you would like the ability to receive text messages from The Bridge you will need to check **Enable SMS Messages** and check **Terms and Conditions**.



4. Select **Save**.
5. An enrollment text message will be sent to your phone number.

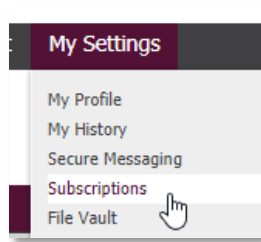


6. Respond to the enrollment message with **BWB ENROLL XXXXXX** and you will receive a message that the enrollment was successful.

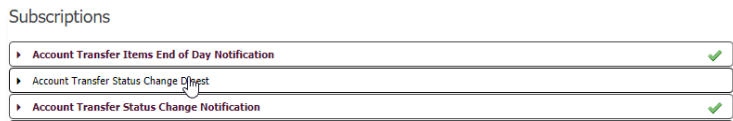


Modifying Subscription Preferences

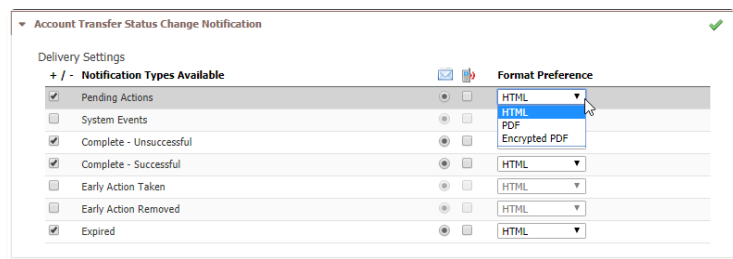
1. Log into The Bridge and go to **My Settings > Subscriptions**.



2. On the Subscriptions page you will see a list of notifications and reports that you are able to receive from The Bridge. Any notifications you are currently subscribed to will be displayed in bold text and have a green check mark on the right-hand side.



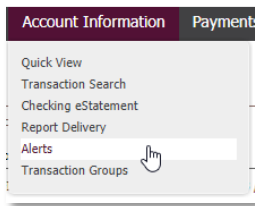
3. Click on a notification to display available options.
 - Check or uncheck the box next to each notification type to turn the notification on or off.
 - Select the radio button under the cellphone icon to receive notifications by text message.
 - Additional steps are needed to enroll in text message notifications for The Bridge please refer to the [Enrolling in Text Message Notifications](#) steps.
 - Notifications can also be sent in PDF or Encrypted PDF format by changing the Format Preference.



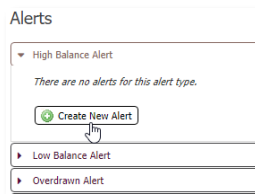
4. Select **Save**.

Modifying Alert Preferences

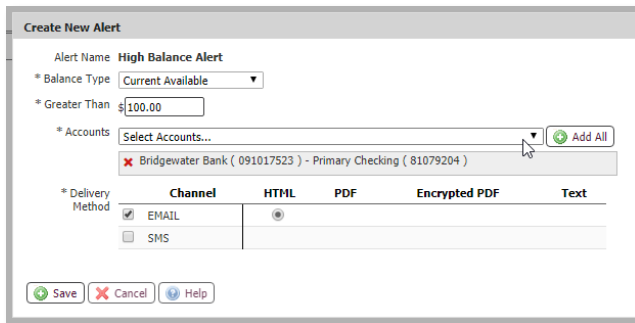
1. Log into the Bridge and go to **Account Information > Alerts**.



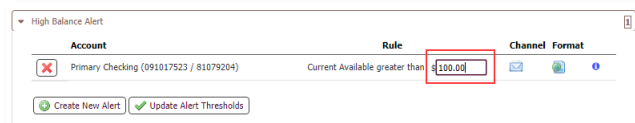
2. Click on the type of alert you want to create to display available options. Select **Create New Alert**.



3. Select the **Balance Type, Amount, Accounts** and **Delivery Method** for the alert.



4. Select **Save**.
5. Alerts you have setup will now display under the Alert Name.
6. Modifying the Alert Thresholds can be done by changing the dollar amount on an existing alert and selecting **Update Alert Thresholds**.
 - Any other changes to the alert need to be done by deleting the existing alert and creating a new one.



Recommended Subscriptions

General Subscriptions		
Subscription	Description	Notification Types
Recommended		
Account Transfer Items End of Day Notification	Notifies users that the end of day for Account Transfers is approaching and there are transactions requiring attention (approval/rejected).	<ul style="list-style-type: none"> ○ Account Transfer Items End of Day Notification
Account Transfer Status Change Notification	ACH Payment has obtained a new status, such as Pending Delivery or Pending Approval.	<ul style="list-style-type: none"> ○ Pending Actions ○ System Events (<i>not recommended</i>) ○ Complete – Unsuccessful ○ Complete – Successful ○ Early Action Taken (<i>not recommended</i>) ○ Early Action Removed (<i>not recommended</i>) ○ Expired
Secure Messaging Reply Received	Notifies company users that Bridgewater Bank has replied to a Secure Message.	<ul style="list-style-type: none"> ○ Secure Messaging Reply Received
User Entitled to New Payment Type <i>(Administrative User Only)</i>	Notification that a user has been given entitlements to one or more new payment types (ACH, Wires, Account Transfer, etc.).	<ul style="list-style-type: none"> ○ User Entitled to New Payment Type
User Payment Settings Report <i>(Administrative User Only)</i>	Notification delivered when a user's payment settings are modified.	<ul style="list-style-type: none"> ○ User Payment Settings Report
User Lockout Report	Notification delivered when a user has become locked out.	<ul style="list-style-type: none"> ○ User Lockout Report
Optional		
Account Transfer Status Change Digest	Notification provides summary of payment status changes that have occurred since delivery of the last notification.	<ul style="list-style-type: none"> ○ Account Transfer Status Change Digest
Change / Delete Impact Notification <i>(Administrative User Only)</i>	Notification that Bridgewater Bank has performed maintenance (such as modifying an ACH Company) that may impact scheduled payments and templates.	<ul style="list-style-type: none"> ○ Change / Delete Impact Notification
File Vault Notice	A new file is available in one of user's File Vaults.	<ul style="list-style-type: none"> ○ File Vault Notice
Stop Request Status Change Notification	Stop Payment has obtained a new status, such as Completed.	<ul style="list-style-type: none"> ○ Complete ○ Exception
User Password Change Report	Notification delivered when a user's password is reset by Bridgewater Bank or a Company Administrator.	<ul style="list-style-type: none"> ○ User Password Change Report
User Password Reset/Change	Notification delivered when an Administrator user's password is reset by Bridgewater Bank or a Company Administrator.	<ul style="list-style-type: none"> ○ User Password Reset/Change Report for Administrators

Report for Administrators <i>(Administrative User Only)</i>		
User Profile Change Report	Notification delivered when a user's profile settings, such as email address or phone number are modified by Bridgewater Bank or a Company Administrator.	○ User Profile Change Report
User Profile Created Report <i>(Administrative User Only)</i>	Notification delivered when a new user is created.	○ User Profile Created Report
User Unlock Report <i>(Administrative User Only)</i>	Notification delivered when a locked-out user has been unlocked.	○ User Unlock Report

ACH & Wire Subscriptions

Subscription	Description	Notification Types
Required		
Out of Band Authorization	Delivers a time sensitive, one-time passcode if a user with correctly enters their PIN during login. User must have setup their OOB pin before this subscription becomes available.	<ul style="list-style-type: none"> ○ Out of Band Authorization
Recommended		
ACH Payment Items End of Day Notification	Notifies users that the end of day for ACH is approaching and there are transactions requiring attention (approval/rejected).	<ul style="list-style-type: none"> ○ ACH Payment Items End of Day Notification
ACH Payment Status Change Digest	Notification provides summary of payment status changes that have occurred since delivery of last notification.	<ul style="list-style-type: none"> ○ ACH Payment Status Change Digest
ACH Payment Status Change Notification	ACH Payment has obtained a new status, such as Pending Delivery or Pending Approval.	<ul style="list-style-type: none"> ○ Pending Actions ○ System Events (<i>not recommended</i>) ○ Complete – Unsuccessful ○ Complete - Successful ○ Early Action Taken (<i>not recommended</i>) ○ Early Action Removed (<i>not recommended</i>) ○ Expired
File Load Failed Validation	User file has failed validation.	<ul style="list-style-type: none"> ○ Account Transfer Import ○ ACH Transaction Import ○ Check Positive Pay Issue File ○ Wire Transaction Import
File Load Successful Validation	User file has successfully been validated.	<ul style="list-style-type: none"> ○ Account Transfer Import ○ ACH Transaction Import ○ Check Positive Pay Issue File ○ Wire Transaction Import
Payee Created Report <i>(Administrative User Only)</i>	Notification that a new ACH or Wire payee has been created.	<ul style="list-style-type: none"> ○ Payee Created Report
Payments Approver Notification	Notifies eligible users that a current day payment is ready for approval.	<ul style="list-style-type: none"> ○ Account Transfer ○ ACH Payments ○ Wire Transfer
Payee Modified Report <i>(Administrative User Only)</i>	Notification that an ACH or Wire payee's account number, ABA, or account type has been modified.	<ul style="list-style-type: none"> ○ Payee Modified Report
Wire Transfer Items End of Day Notification	Notification that the end of day for wires is approaching and there are transactions requiring attention (approval/release).	<ul style="list-style-type: none"> ○ Wire Transfer Items End of Day Notification
Wire Transfer Status Change Digest	Notification provides summary of payment status changes that have occurred since delivery of last notification.	<ul style="list-style-type: none"> ○ Wire Transfer Status Change Digest

Wire Transfer Status Change Notification	Wire Transfer has obtained a new status, such as Pending Approval or Pending Release.	<ul style="list-style-type: none"> ○ Pending Actions ○ System Events (<i>not recommended</i>) ○ Complete – Unsuccessful ○ Complete - Successful ○ Early Action Taken (<i>not recommended</i>) ○ Early Action Removed (<i>not recommended</i>) ○ Expired
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Check Positive Pay Subscriptions

Subscription	Description	Notification Types
Recommended		
Check Positive Pay Decisions Requiring Approval	Notifies eligible users that there are Decisions requiring approval.	<ul style="list-style-type: none"> ○ Check Positive Pay Decisions Requiring Approval
Check Positive Pay Exceptions Notification Report	Notifies eligible users that there are Exceptions to be decided.	<ul style="list-style-type: none"> ○ Check Positive Pay Exceptions Notification Report
Check Positive Pay Approaching Cutoff Notification	Notifies eligible users that the decision cutoff is approaching.	<ul style="list-style-type: none"> ○ Check Positive Pay Decision Batch Report
Optional		
Check Positive Pay After Cutoff Notification	Notifies eligible users of any exceptions that were not decided prior to cutoff.	<ul style="list-style-type: none"> ○ Check Positive Pay After Cutoff Notification
Check Positive Pay Decision Batch Report	Delivers a daily report summary of all decisions made.	<ul style="list-style-type: none"> ○ Check Positive Pay Issue File Report
Check Positive Pay Issue File Report	Delivers a daily report summary of all issues entered.	<ul style="list-style-type: none"> ○ Check Positive Pay Approaching Cutoff Notification