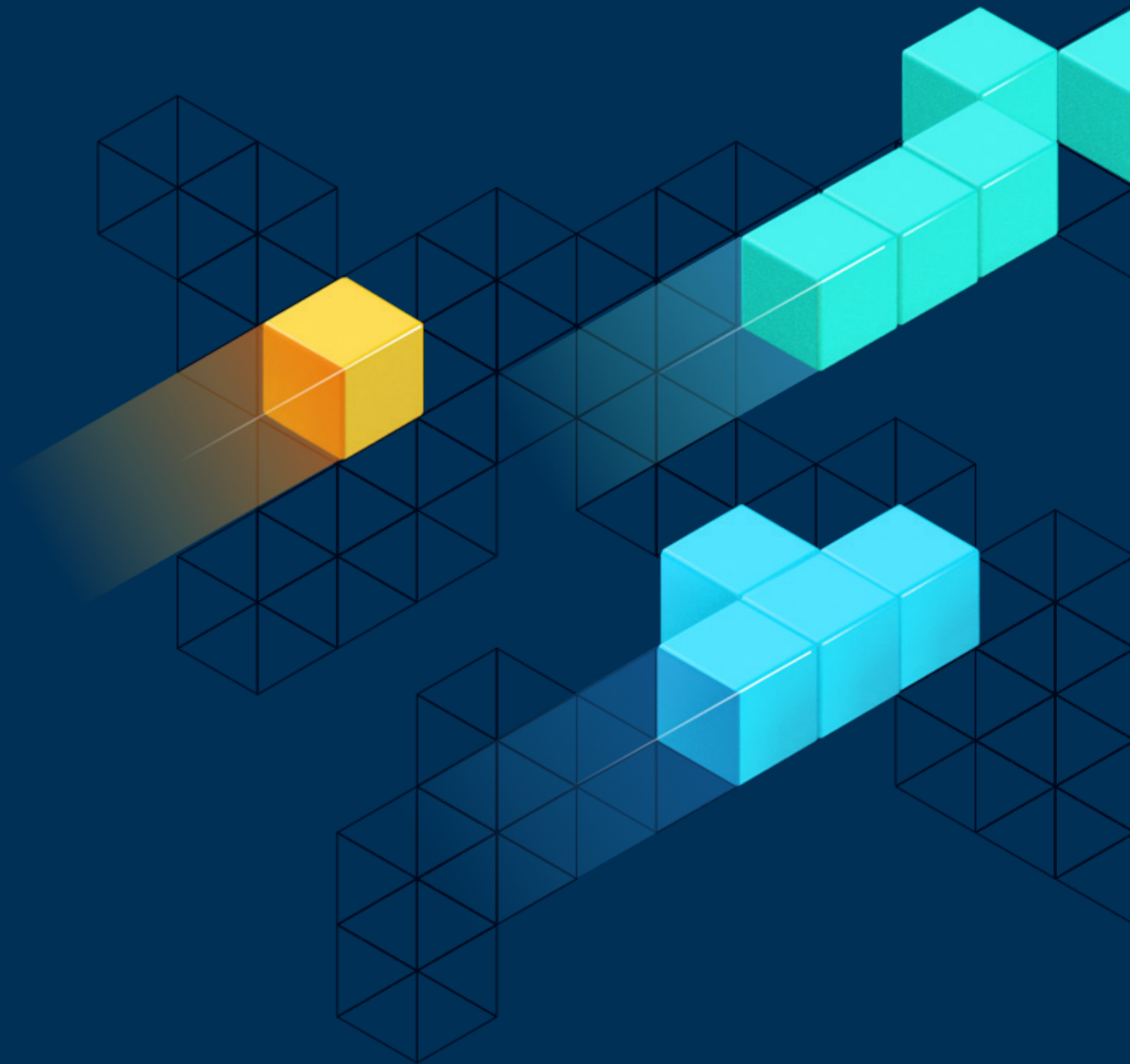




GUIDE DOCUMENTATION

Notifications

A summary of managing the notifications available and when they are sent



Contents

This guide explains how to set up various email notifications in the Modlr Customer Portal

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Notification settings

Go to the Notifications setup screen to manage various email notifications about activity on your accounts.

Select Notifications in the side menu to see the various notification settings available.

Modlr Busy Business Limited Lucy D'Zouza

Notifications

These settings apply to all accounts.

- Payment summary** OFF
Send an email when pending payments (payments requiring funds, future dated and those requiring approval) need attention.
- Funds in** OFF
Send an email when funds above a chosen amount are paid in.
- Balance below** OFF
Send an email when balance is **below** a chosen amount
- Balance above** OFF
Send an email when balance is **above** a chosen amount
- Scheduled balance alerts** OFF
Send an email with account balances on selected days
- Total payments threshold alerts** OFF
Send an email when **total payments out** in one day go over a chosen threshold
- Statement notifications** OFF
Send an email when new account statements become available.

[Save changes](#)

Notifications are individually turned on and off

The default is all OFF (except Approvals notifications)

About notifications i

- Approvals notifications are **automatically** sent to any user that has Approval permissions. These are sent daily at 9am and are not configurable by users.
- The Payment Summary notification is sent at 9am every morning when there are active unapproved payments or beneficiaries in the system.
- Other notifications are sent as events happen on the account.

Notification recipients

Switch on each notification individually and enter email addresses for the recipients.

Modlr Busy Business Limited Lucy D'Zouza

Notifications

These settings apply to all accounts.

Payment summary ON

Send an email when pending payments (payments requiring funds, future dated and those requiring approval) need attention.

Send notification to

Enter email address(es) separated by commas

Funds in ON

Send an email when funds above a chosen amount are paid in.

Enter amount

Set to zero (0) to receive emails when any funds arrive.

Send notification to

Enter email address(es) separated by commas

Balance below ON

Send an email when balance is below a chosen amount

Enter amount

Send notification to

Enter email address(es) separated by commas

Balance above ON

Send an email when balance is above a chosen amount

Switch the notification on to reveal the settings

Enter email addresses of whoever needs to receive the notification email

ON/OFF is the same for all users of this customer, but individual email addresses can be added/removed.

Email addresses don't have to be Modlr users but obviously they won't be able to sign in from the link in the email.

Notifications – Scheduled Balance Alert

The Scheduled Balance Alert can be configured with a time slot and a day to receive the notification.

The screenshot shows a configuration page for 'Scheduled balance alerts'. At the top, there is a text input field for 'Enter email address(es) separated by commas'. Below this is a toggle switch for 'Scheduled balance alerts' which is currently turned 'ON'. A sub-section explains 'Send an email with account balances on selected days'. It includes a 'Send balance' section with 'am' and 'pm' buttons, where 'am' is selected. Below that, a section titled 'Which day(s) should the alerts be sent?' features seven day buttons: 'M', 'T', 'W', 'Th', 'F', 'Sa', and 'Su', all of which are highlighted in blue. A note below the days states 'Toggle on and off the times and days you want the emails to send' and 'Will send emails: EVERY DAY between 5am-11am.'. There is another 'Send notification to' text input field. The next section is for 'Total payments threshold alerts', which is also turned 'ON'. It includes a text input for 'Enter threshold'. Below this is another 'Send notification to' text input field. The final section is for 'Statement notifications', which is turned 'ON', with a text input for 'Send notification to'. At the bottom left of the form is a blue 'Save changes' button.

For Scheduled balance alerts, users can choose when to receive the emails

Click to save settings

Notifications details

A summary of each notification's content and when they are sent

Email name	Description	Contains	When sent
Payment summary	Summary of Pending Payments across all accounts	<ul style="list-style-type: none"> • Summary of numbers of pending payments and their value • Date/time when email is sent • Number that are waiting for funds + value • Number that are future dated (for tomorrow) + value • Are due to expire tomorrow 	<p>Sent each morning at 9am if accounts have items pending</p> <p>Sent day before future dated payments are due to send</p> <p>Sent day before payments that are due to expire</p>
Approvals	Summary of payments and beneficiaries that require approval	<ul style="list-style-type: none"> • Customer name • Date and time • Number of payments awaiting approval + value • Number of beneficiaries awaiting approval 	<p>Whenever there are approvals outstanding.</p> <p>Sent at 9am each day</p> <p>Automatically sent – only sent to users with admin+approver rights (can't add other email addresses)</p>
Pay in	Receive a notification when a payment above a user-defined amount is received into an account	<ul style="list-style-type: none"> • Customer name • Account alias(s) • Amount paid in • Reference(s) 	<p>On event</p> <p>When an account receives a pay-in above the user-defined amount</p>
Balance below	Receive an email when a balance falls below a user-defined amount	<ul style="list-style-type: none"> • Customer name • Account alias(es) • Balance(s) • Date and time 	<p>On event</p> <p>When an account's balance falls below the user-defined amount</p>
Balance above	Receive an email when a balance goes above a user-defined amount	<ul style="list-style-type: none"> • Customer name • Account alias(es) • Balance(s) • Date and time 	<p>On event</p> <p>When an account's balance goes above the user-defined amount</p>
Scheduled balance alert	Receive an email containing account balances on user-selected day(s)	<ul style="list-style-type: none"> • Customer name • Account alias(es) • Account ID(s) • Balance 	Scheduled by user
Statement notifications	Receive an email when a new statement is downloadable	<ul style="list-style-type: none"> • Customer name • Number of accounts statements are available for 	<p>On event</p> <p>Sent when statement is available at the beginning of each month.</p>



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