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Managing Alerts in CentreSuite

You manage your alert subscriptions on the Manage Alerts page. If you are a cardholder with one account, the account and the alerts display on the My Accounts tab. The alerts activated for your account display below and you can manage your alerts there.

If you have access to or ownership of multiple accounts, those accounts display on the My Accounts tab (direct ownership) and the Accounts I Manage tab (access to). The alerts activated for those accounts display below and you can manage those account alerts there.

You select the account or accounts and then specify which alerts you want to receive for them. If you do not want to receive an alert. Set the On/Off control to **Off**.

This document has two sections, To manage your alerts (below) and Working with alerts on page 2.

To manage your alerts

You subscribe to alerts on the Manage Alerts page. When one of these alerts are triggered, you will receive an alert email. Locate your name in the upper right corner of the screen and click on the arrow next to your name. A drop down menu will appear. Click on **Manage Alerts**.
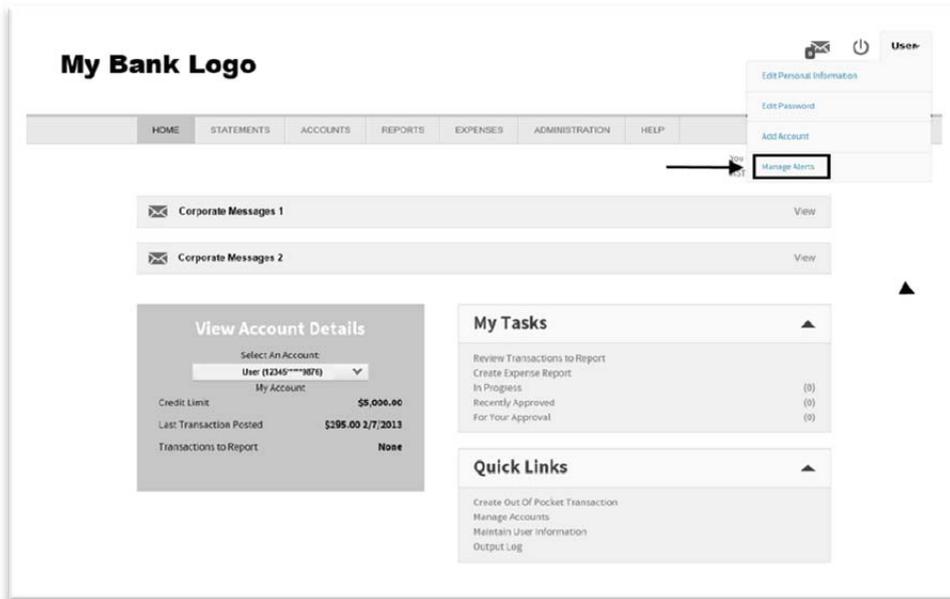
1. Click **Manage Alerts** from the User drop down list in the upper right corner of the home page. The Manage Alerts page displays.

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2. Your account or accounts display on the Manage Alerts page. If you have multiple accounts assigned to you, select the accounts you want to apply the alert subscriptions to. If you have a single account, it is selected by default.

3. You activate or deactivate alerts by toggling the On/Off control to the left of the alert. Certain alerts have additional parameters that you can set. For example, the Account Past Due control (see above) allows you to select the number of days past due that will trigger an alert.

4. When you have set up your alerts, click **Save Alerts**. The alerts are saved.

If you manage multiple accounts, select the Accounts I Manage tab. All accounts you manage are listed. Select all accounts or a subset of those accounts and activate the alerts you want applied to these accounts. When you click **Save Alerts**, those alerts are saved and will be triggered for all selected accounts.

Working with alerts

The list below details all available alerts. You manage your alerts by turning them on or off and, in some cases, specifying additional alert parameters. The following alerts are available, you may see all or a subset of these alerts depending on which alerts are activated by your organization.

- **Account past due**
  Select one or more options. The user will receive an email alert when the account is past due for any of the selected times. Useful for Admin or Individual Bill programs.

- **Payment due**
  Select this option to send an email when a payment on the account is due in ten days. Useful for Admin or Individual Bill programs.

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- The **Current balance approaching credit limit** alert has two options to trigger the alert. You select one of these options and apply it to the alert. This alert is the most useful alert for both the Cardholder and Admin.

  - **Calculate by: Amount within**. Specify the amount within the credit limit. When the balance exceeds the credit limit minus the amount you specify, the alert will trigger. Specify whole, positive numbers. Do not use currency symbols, commas, or decimals.
  - **Calculate by: Percent within**. Specify the percent within the credit limit. When the percent balance amount exceeds 100 *minus* the amount you specify, the alert will trigger. For example, if you want the alert to trigger when the balance is 95% of the credit limit, type 5 in the Percent within field. Specify whole, positive numbers. Do not use the percent sign, commas, or decimals.

- **Current Balance Exceeds credit limit**
  Select this option to send an email when the current balance exceeds the account credit limit.

- **Transaction equal to or above amount - Admin Alert only**
  Select this option to send an email when a transaction is posted that equals or exceeds the single transaction amount specified for the account.

- **New Account - Admin Alert only**
  Select this option to send an email when a new account is processed.

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