

Message Center

Send and receive secure messages communicating with the SMBT Treasury Services Support.

- **Inbox:** View messages that have been received
- **Sent:** View messages that have been sent
- **Archived:** View messages that have been moved to archived
- **Refresh:** Use the circular arrows to refresh



NOTE: An email notification will be generated to the user's email address when a new message is available in the inbox.

Compose Message

Use the *Compose* options to create a message.

- Select **Compose**
- Select a **Subject** from the drop-down list
- **Select File** to attach a file if desired
- Enter your message in the Message field available
- When the message is complete, select **Send** to submit to the Treasury Support team

A screenshot of the 'Compose Message' form. It includes a 'Subject' dropdown menu with '- Select Subject -', an 'Attach file' button with a file icon and 'Select File...' text, and a 'Message' text area. Below the text area is a character count '1000 of 1000 characters remaining'. At the bottom are 'Send' and 'Cancel' buttons.

Archive a Message

- From the *Message Center Inbox*, open the message you want to archive
- Choose **Archive** from the message controls
- An Archive Message dialog box opens, select **Archive**

A screenshot showing an email message and an open 'Archive Message' dialog box. The email header shows '307784 Reports' and 'From: Katelynn Racolta'. The message body says 'Hello, please see attached the report we have available.' and 'Thank you, Treasury Services Support'. The 'Archive Message' dialog box shows 'Message ID: 307784', 'From: Katelynn Racolta', 'Subject: Reports', and 'Date: 1:41 PM, 11/14/2024'. It has 'Archive' and 'Cancel' buttons.

Advanced Search

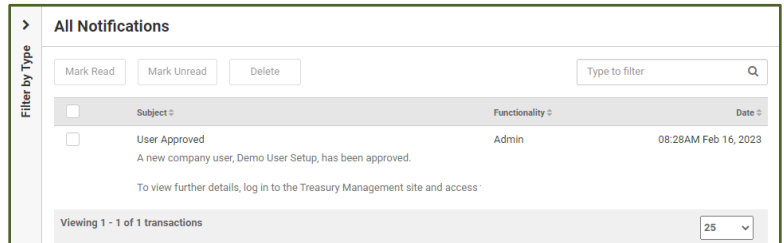
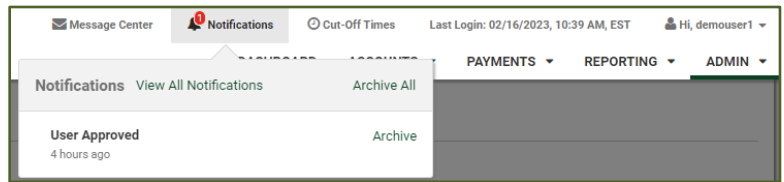
- From the *Message Center Inbox*, select **Advanced Search**
- Define the search criteria
 - Message ID
 - Subject
 - Date Range
 - Type: All, Inbox, Sent or Archived
- Select **Search**

A screenshot of the 'Search Messages' dialog box. It has input fields for 'Message ID', 'Subject', and 'Date'. The 'Date' field is a range selector with 'mm/dd/yyyy' format. Below these is a 'Type' section with radio buttons for 'All', 'Inbox', 'Sent', and 'Archived'. At the bottom are 'Search' and 'Reset' buttons.

Notifications

Use Notifications to monitor activity on your Southern Treasury profile. Notifications include Wire and ACH payment activity, Positive Pay exceptions, upcoming cutoff times with pending items, and more.

- Select **Notifications** from the top menu to review received notifications.
- Select **Archive** to manage a single notification at a time or **Archive All** to remove notifications.
- Use the **View All Notifications** link to see an entire list of notifications, even those you have archived.
- Use **Filter by Type** search panel to filter received alerts by status or functionality.



Cut-Off Times

Use the *Cut-Off Times* view to see the times indicate when a task must be completed to ensure same day processing.

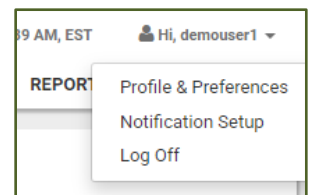
Profile & Preferences

Use the Profile & Preferences view to set up and maintain your personal and security information details.

Click on your username, then select **Profile & Preferences**.

User Information

Manage your email address, phone, mobile phone and fax numbers.



NOTE: The **Name** and **User ID** cannot be edited. Contact your Company Admin for changes to these fields.

Security Preferences

Manage security settings for your Southern Treasury profile.

Change Password

- Select **Change Password**
- Enter your **Current Password**
- Define a **New Password** that meets the criteria displayed on the screen
- Re-type the new password to **Confirm New Password**
- Click **Submit** to save

TIP: Follow these tips to create a secure password:

- Use a long passphrase – a news headline, book title, or song lyric – then add in numbers, punctuation, or symbols.
- Avoid using common words – substitute letters with numbers, punctuation, or symbols.

Account Labels

Choose whether to see Account Nicknames or Account Numbers.

Account Number Masking

Choose whether the account numbers are masked to display the last four numbers or the full account number.

Notification Setup

Use the *Notification Preferences* view to set up and maintain your individualized notifications

Click on your username, then select **Notification Setup**.

Enter Contact Information

Your email address will be automatically populated and used for email alerts. If you would also like to receive notifications via text message, enter your mobile phone number as well.

NOTE: For notifications received via text message, messaging and data rates may apply.

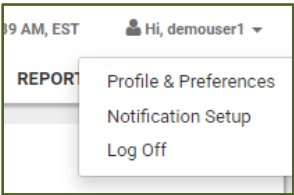
Select Notifications

Users can receive notifications for a variety of items. Review the available options by expanding the list beneath each heading.

For each notification you would like to set up, place a check in the box that corresponds to the notification and method to receive.

NOTE: Desktop alerts are only delivered when you are logged in to Southern Treasury.

Click **Submit** to save your selections.



Notification Preferences

Email:

Mobile #: - - Messaging and data rates may apply.

☒ ACH

☒ Admin

☒ Login

☒ Positive Pay

☒ Stop Payment

☒ Transfer/Loan Payment

☒ Wire

Log Off

Use the Log Off option to sign out of your Southern Treasury profile.

- Click on your username, then select **Log Off**
- A *Confirm Log Out* dialog box appears, select **Log Out**

