CommBiz User Guide

Viewing and Managing Messages

About this guide

This guide covers how to:

- Enable email and SMS alerts for your CommBiz service (for Administrators)
- Enable Bank messages, email and SMS alerts as a user
- View Bank messages in CommBiz

Important information

Before you can enable email and SMS alerts, the functionality must be turned on by the CommBiz Administrator for your CommBiz service.
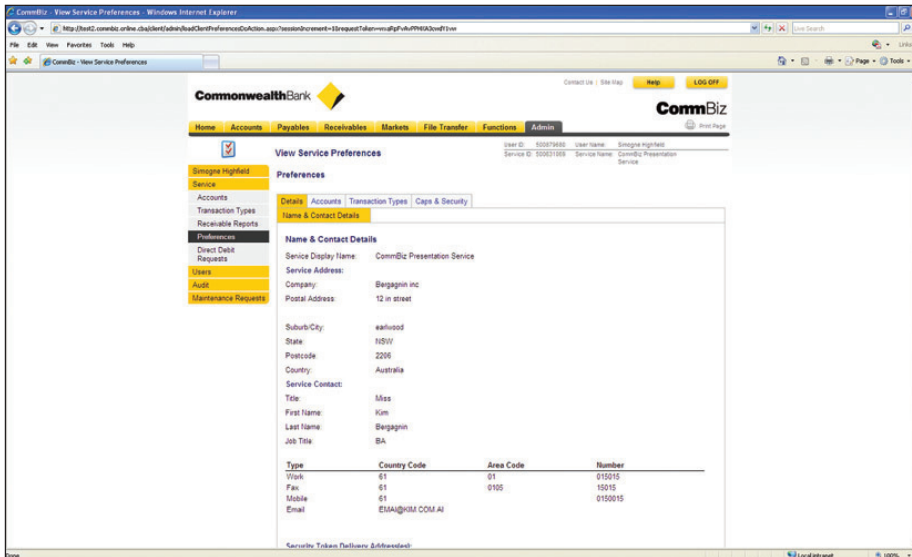
Enabling email and SMS alerts

Note: These steps (1–10) can only be performed by an Administrator.

1. Open your internet browser, visit **www.commbiz.com.au** and log in to CommBiz using your security token.
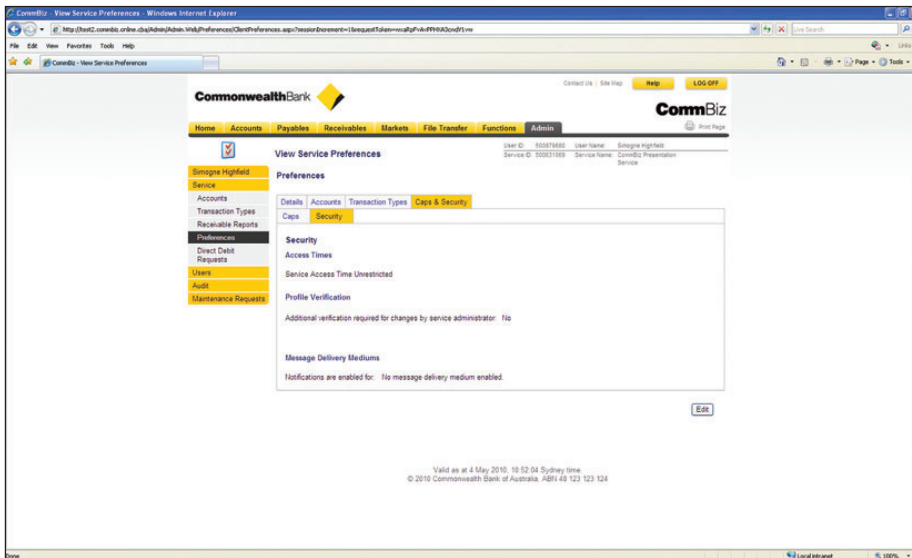
2. On the top menu, click **Admin > Service**.

3. Select **Preferences** on the lefthand menu.

4. Select the **Caps and Security** tab.
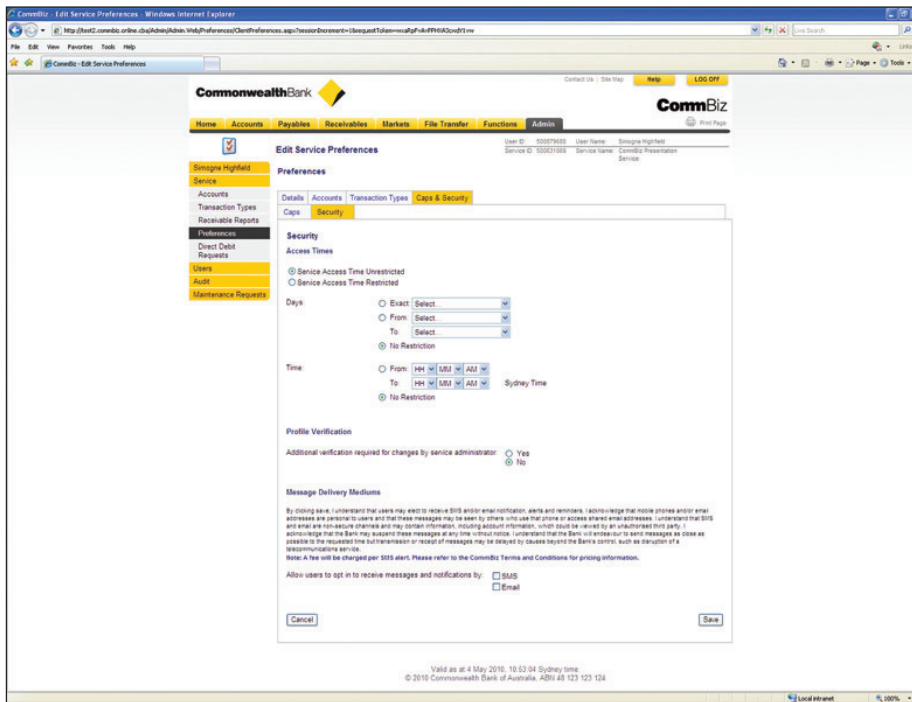
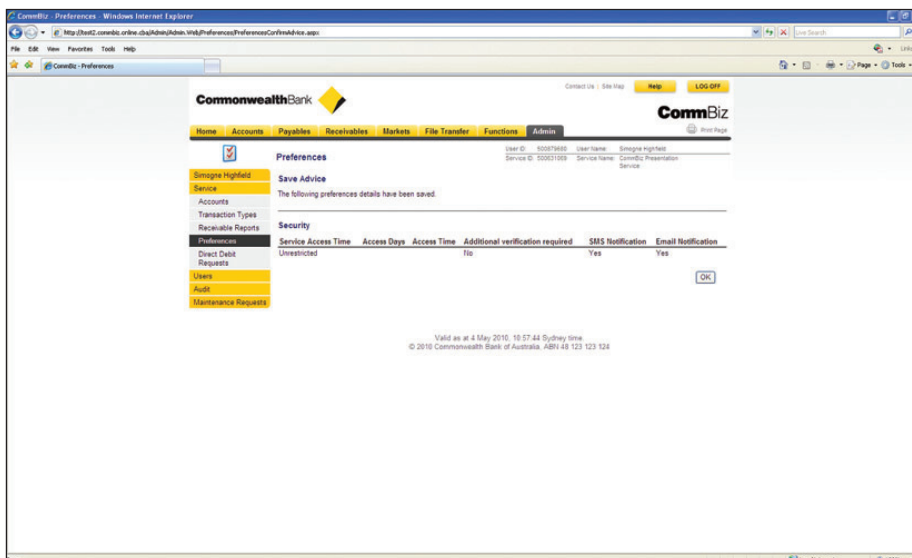**5.** From the lower row of tabs, select **Security**.

6. The security page is displayed. Click **Edit** at the bottom right.

7. On the **Edit Security Preferences** page, under **Message Delivery Mediums**, you can allow users to opt in to receiving messages and notifications by SMS and/or emails. Select the relevant options.

   Note: A fee may be charged per SMS alert. Please refer to the CommBiz Terms and Conditions for pricing information.
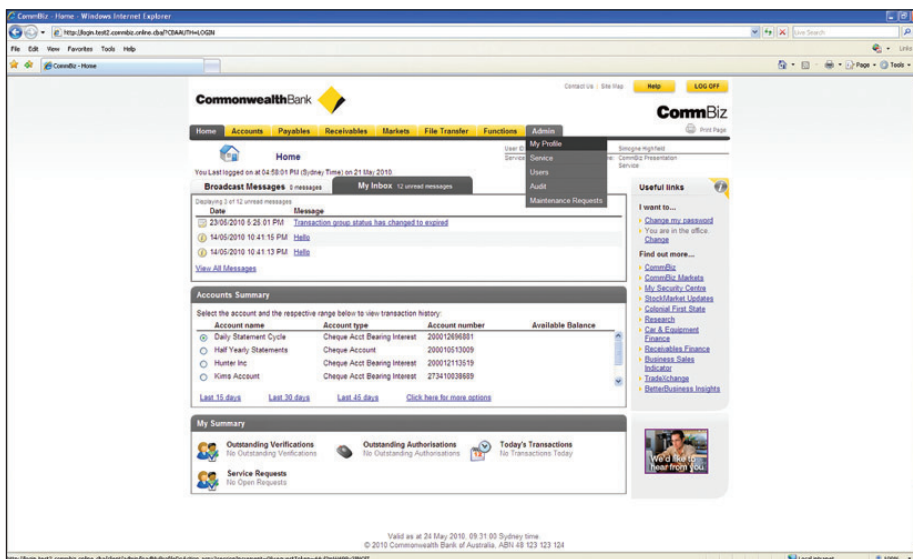

8. Click **Save**.

9. Check that the details are correct on the **Confirm Save** page then click **Confirm**. To make changes to your selected options, click **Modify** and repeat Step 7.

10. The **Save Advice** page is displayed. Click **OK** to be returned to the **View Service Preferences** page.
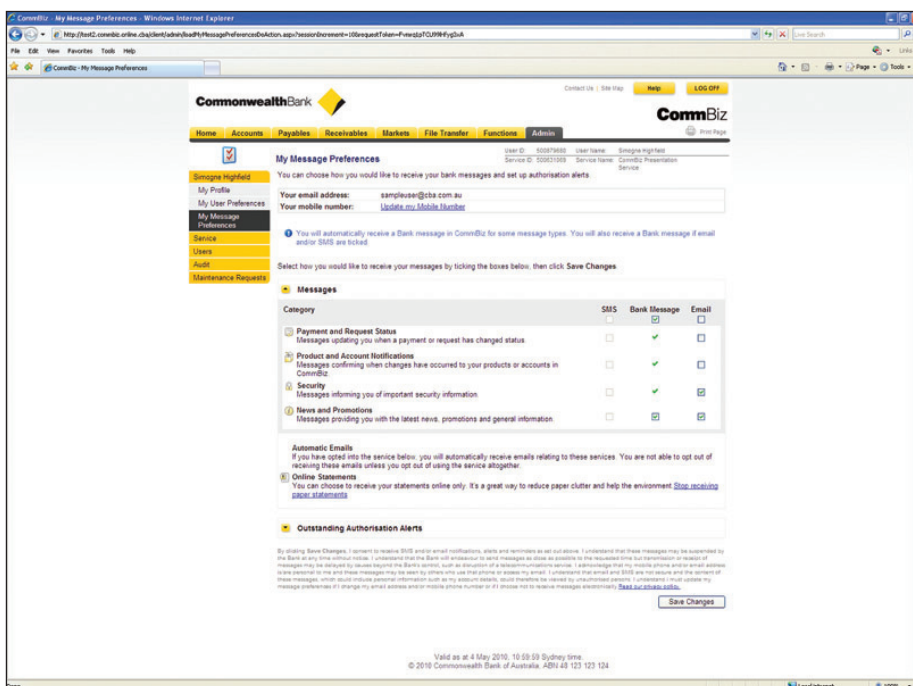

   Note: To switch off SMS and email alerts for your service, follow Steps 1–9 and deselect the check boxes for SMS and/or emails under Message Delivery Mediums on the Security page.

1. Open your internet browser, visit **www.commbiz.com.au** and log onto CommBiz.

2. On the top menu, click **Admin > My Profile**.

3. The **View User Profile** page is displayed. Select **My Message Preferences** on the lefthand menu.

4. The **My Message Preferences** page is displayed.

Note: To receive SMS alerts you must have a mobile number on your profile; to receive email notifications you must have an email address. If you are an administrator and do not have these details on your profile, click on the **Update my Email Address** and/or **Update my Mobile Number** hyperlink at the top of the screen to update these details. If you are not an administrator, a message will display requesting that you contact your administrator to update these details.
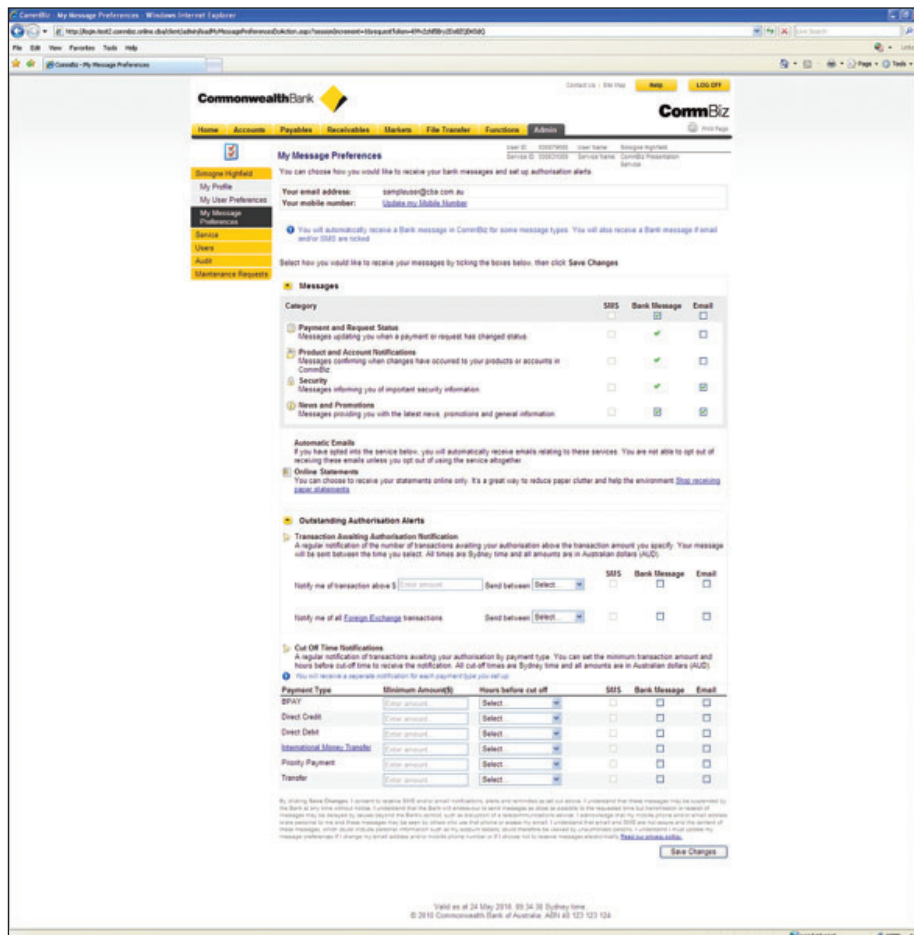
5. Under **Messages**, select which message categories you want to opt in for — SMS, emails and bank messages (viewed in CommBiz).

   Note: You cannot opt in or out for some bank message categories. The SMS opt-in check box is only available for the News and Promotion category. If you opt into SMS or email for a category, you must receive a bank message. This is a security requirement to enable you to verify an SMS or email as valid by checking the corresponding bank message in CommBiz.

Enabling outstanding Authorisation alerts

6. To receive alerts for transactions awaiting authorisation, select the small yellow down arrow next to the heading Outstanding Authorisation Alerts. This will expand the **Outstanding Authorisation Alerts** section.

   Note: You must be an Authoriser for accounts on your CommBiz service to receive these alerts.
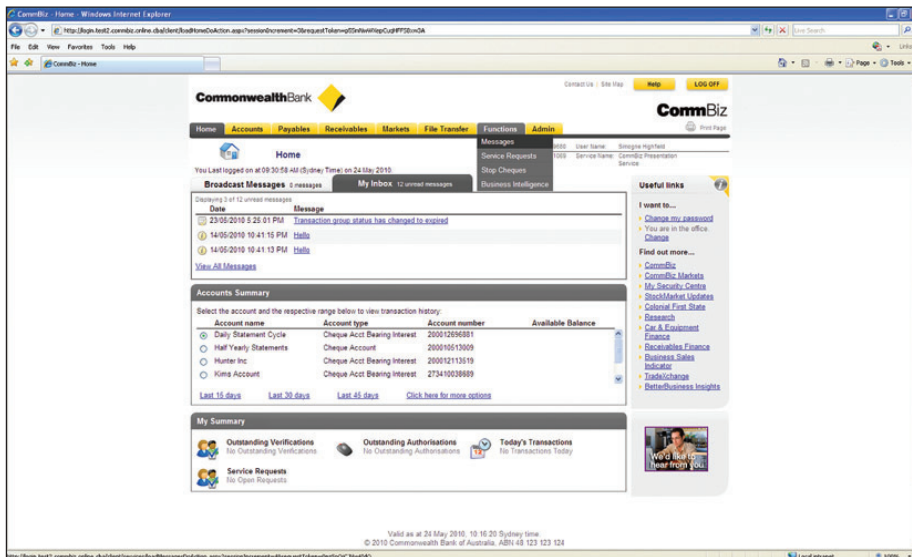

7. Complete the **Transaction Awaiting Authorisation Notification** fields.

8. To receive alerts via SMS, email or bank messages, select the relevant check box.

9. To be notified only of transactions over a specified dollar value, enter the amount in the **Notify me of transactions over $** field.

   Note: To receive an alert for all transactions awaiting authorisation regardless of their value, please enter zero (0).

10. You must select the time that you would like to receive this message by selecting the time from the **Send Between** dropdown list.

11. To receive alerts for **Foreign Exchange** transactions, select a time from the **Send Between** dropdown list. To receive alerts via SMS, email or bank message, select the relevant check box.

12. To receive notifications for transactions awaiting your authorisation by payment type as they approach their cut-off time, complete the details under **Cut Off Time Notifications**. For the payment types for which you would like to receive an alert, enter the **Minimum Amount ($)** you want to be notified for. To receive an alert regardless of the dollar value, please enter zero (0).
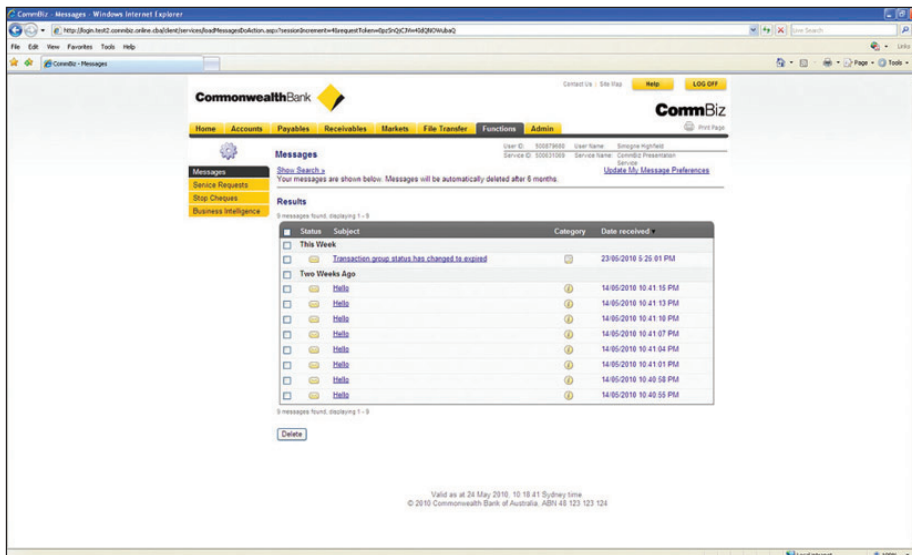
13. Select the Hours **before Cut-off time** from the dropdown box.

14. Select the relevant check boxes for the type of messages you would like to receive. You can select bank message and/or SMS and email.

15. Check that the details are correct and click **Save Changes**. At the top of the page, you will see a message stating 'Your message preferences have now been saved'.
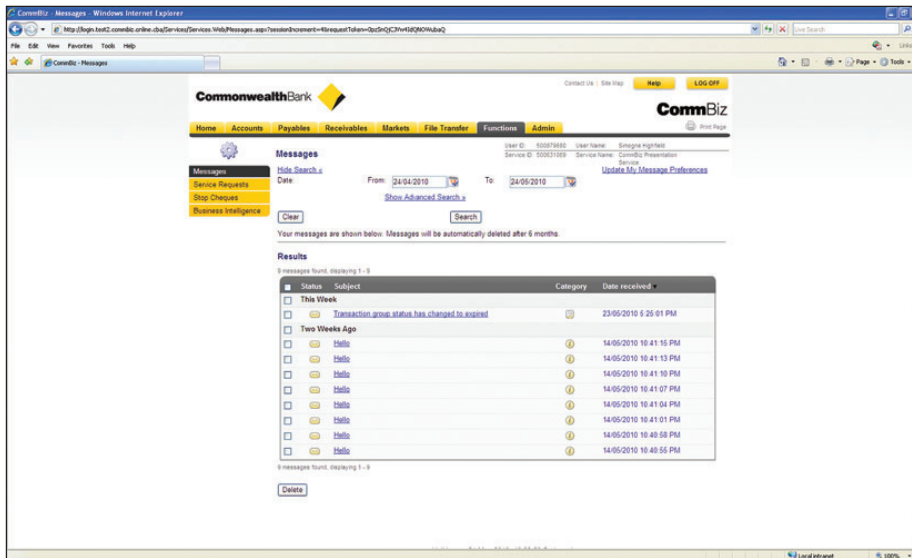
Viewing Bank messages

1. Open your internet browser, visit **www.commbiz.com.au** and log onto CommBiz.

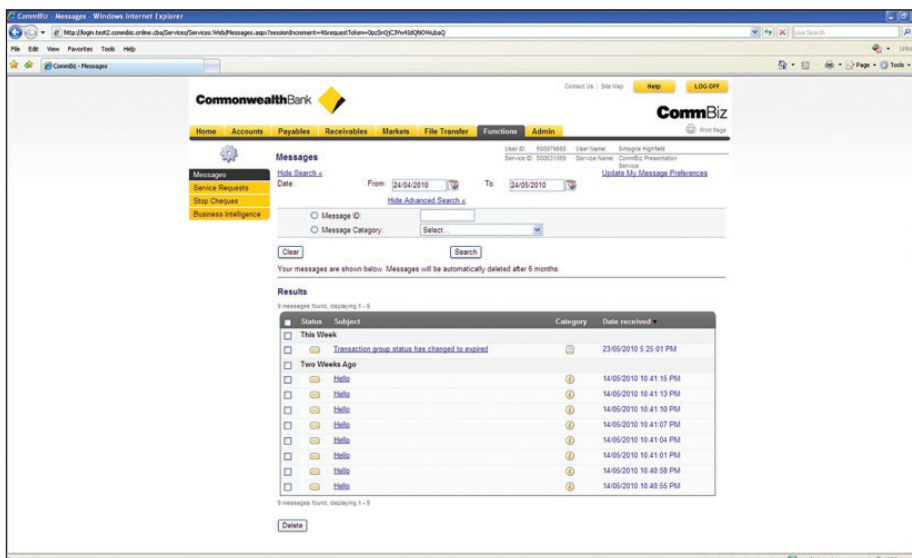**2.** On the top menu, click **Functions > Messages.**

3. The **Messages** page is displayed, showing your most recent messages.

4. To show only certain messages, click **Show Search >** and choose the date range of the messages you wish to view, then click **Search**.

5. To search for a specific message, click **Advanced Search >**. You can search by **Message ID** (displayed on emails) or **Message Category** (for example, payment and request status). Select the search method and enter the relevant Message ID or Message Category, then click **Search**.

6. To view message details, click the blue subject link. The Message Details page will then display.