

KT BY PRAVEEN

Alert Class	Delivery Methods	User must enable	User can disable	User has choices when enabling	FI can change Class	Shows in alert management
Compliance	Defined by Alert. User has no config options.	No	No	No	No	No
Mandatory	System defined defaults. User can add additional	No	No	No	Yes	Yes
Recommended	System defined defaults. User can add additional	No	Yes	No	Yes	Yes
Optional	User chooses destinations	Yes	Yes	No	Yes	Yes
User	User chooses destinations	Yes	Yes	Yes	No	Once created

Building an alert...how it is done

Alerts have a lot of seed data that must be generated

1. Alert definition-names the alert and defines its properties (alertdef and alertdefset)
2. Alert templates-defines the content delivered to a destination (alerttemp)
3. Alert action-identifies the triggering event (alertact)
4. L10N mapping – the display name for the alert in alert management.

NCR Confidential 7

D3-seed-data repo has alerts

```
<alertdef alert="RECURRING_PAYMENT_MODEL_EXPIRATION" del="true">
    <desc>The Recurring Payment Model Expiration alert notifies the user when a scheduled bill payi
    <procGroup>NOTIFICATION</procGroup>
    <dispGroup>MONEY_MOVEMENT</dispGroup>
    <prop name="default-frequency">ALWAYS</prop>
    <prop name="substitution-parameters">ALERT_DATE,PAYEE_NAME,TX_AMOUNT,ACCOUNT_NAME,TX_DATE,ALER
</alertdef>
```

```
<alerttempList>
    <alerttemp alert="BILL_PAYMENT_FAILURE" cuid="ROOT" format="EMAIL_HTML" locale="en">
        <subject>Bill Payment Failure Alert from your bank</subject>
        <template>A payment to {{PAYEE_NAME}} with the amount {{TX_AMOUNT}} involving your account {{A
    </alerttemp>
```

<http://coreqa2.d3vcloud.com:3085>

More wiki about API

Recurring Model Edit - Next Transfer Date

- Changing the date of the next transfer does NOT normally change the model start date, frequency, or end option or affect future transfers
 - Model sending money on 5th of each month will continue to use the 5th for future transfers even if you move the next (single) transfer to the 10th
- Moving it too far in future may skip a period depending on the frequency (70% rule in TransferUtil.calculateNextDate)
- Edit Series will populate the arrive date on the UI with the next transfer date and saving will update model start date!

Recurring Models - Special Date Handling

- During the calculation of the next transfer date, the calculated next date may fall on a closed or weekend day
 - Each adapter/rail has rules for allowing weekend/closed date transfers - ACH typically does not allow it, Core does
- Should the date fall on an illegal date, special logic uses “re-date” company attribute to drive logic
 - Choices: NEXT, PREVIOUS, or NEAREST valid date
- As with editing a transfer in the model, this re-date does not change model dates or the date chosen for future transfers

Bill Discovery

- Fiserv specific feature
- Only available on the NEXT api
- Finds the billers for this user in their electronic biller network and credit report (once a year)
- User consent required every year
- Periodically searches for any new billers once the user is opted in
- Reduces the friction in adding managed payees