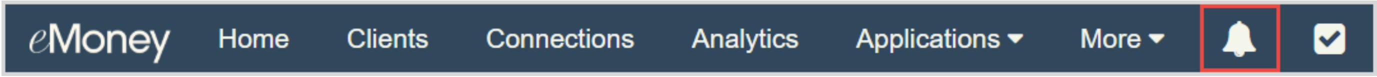
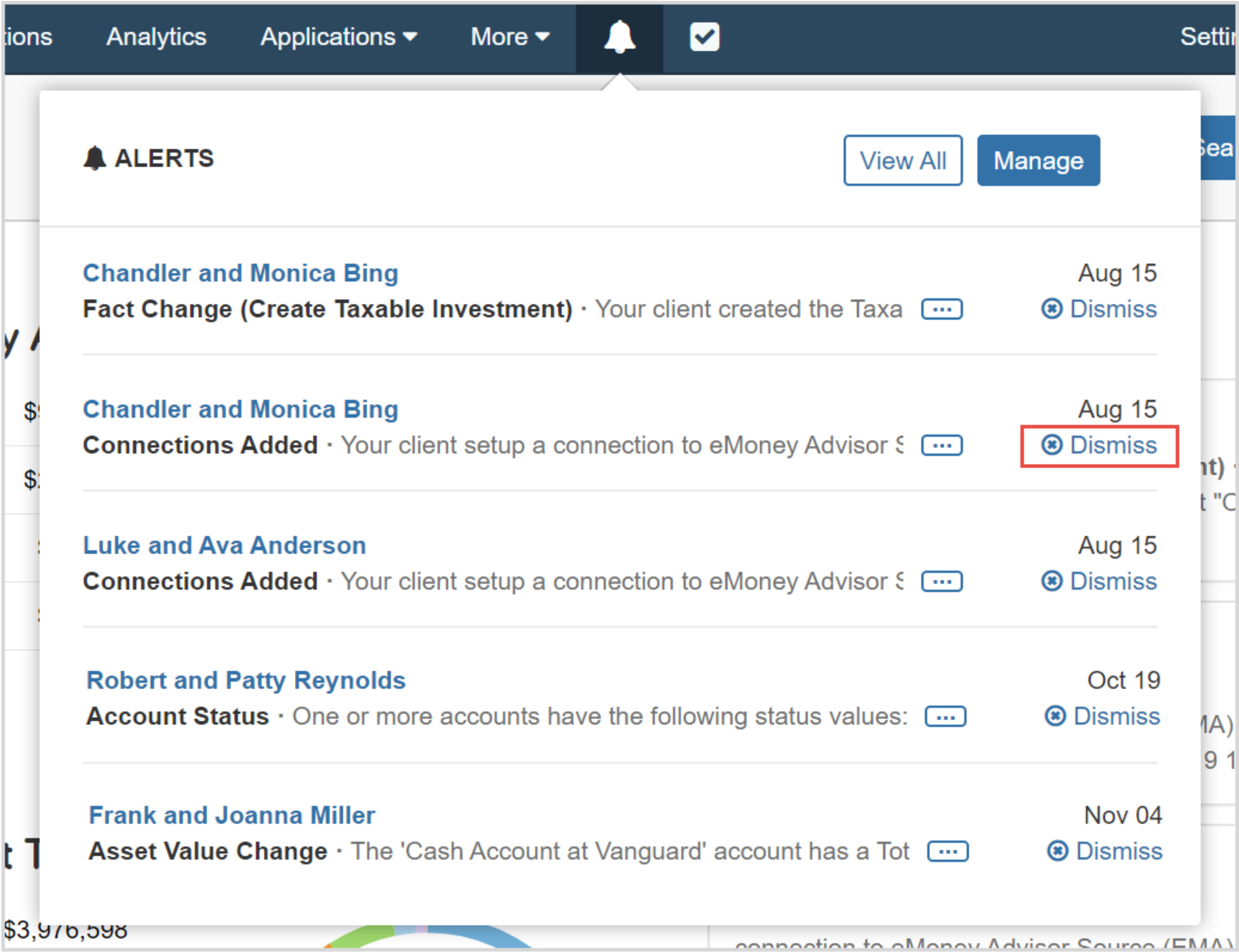
Setting Up Alerts

In this user guide, we will demonstrate how to set up **alerts**.

1. Click the **Bell icon** that appears in the Navigation Bar.



2. The list that appears will show any alerts currently triggered. To dismiss a triggered alert, click the **Dismiss** button to the right of the selected alert.



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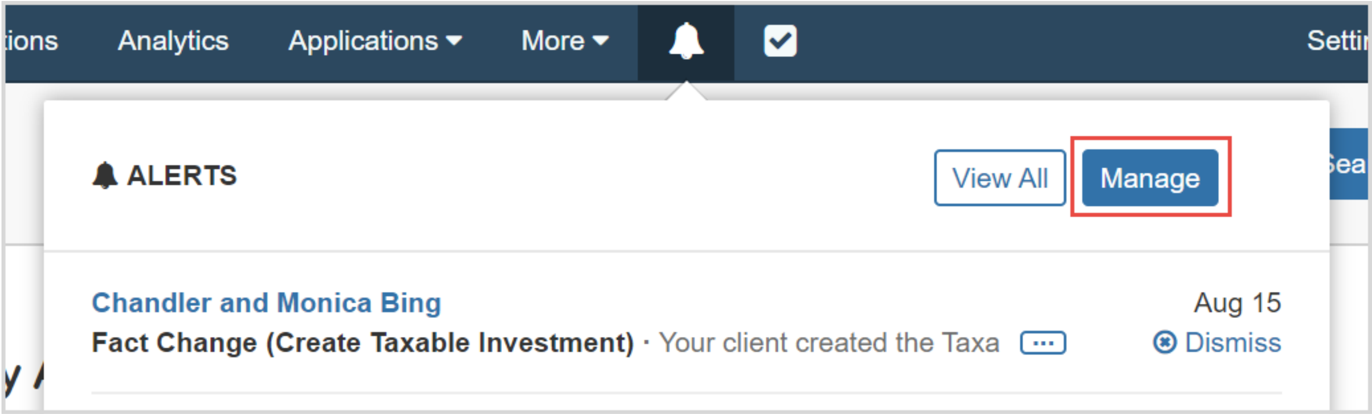
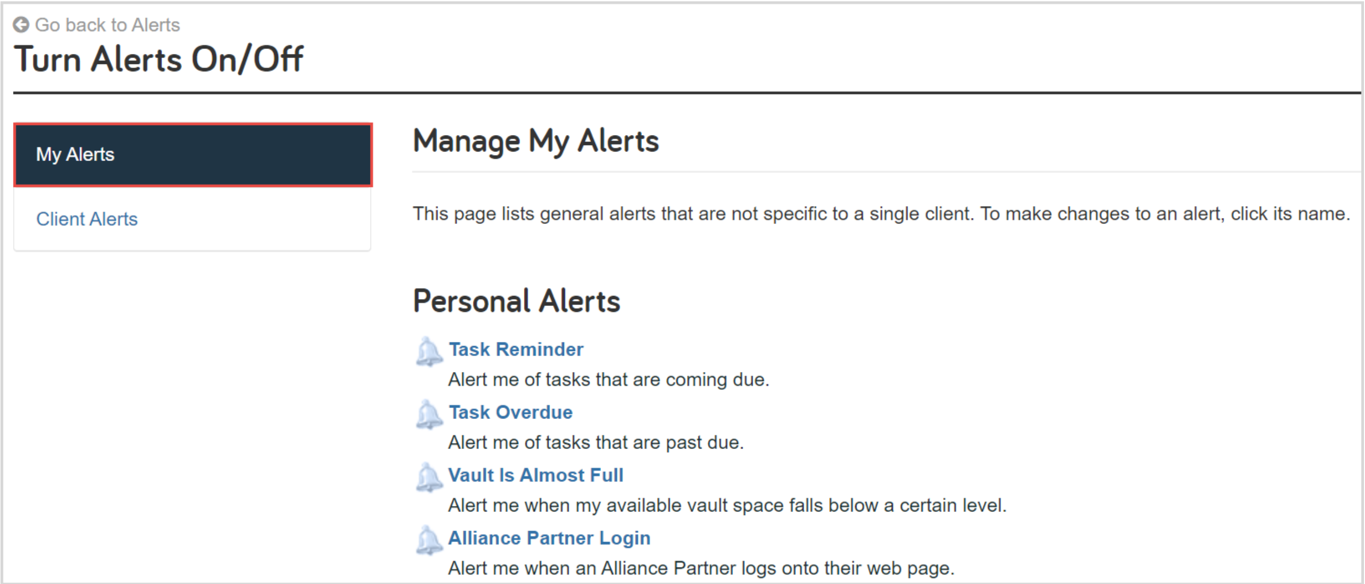
3. To manage Advisor and Client-specific alerts, click **Manage.**



4. The **My Alerts** page lists general alerts that are not specific to a single client.



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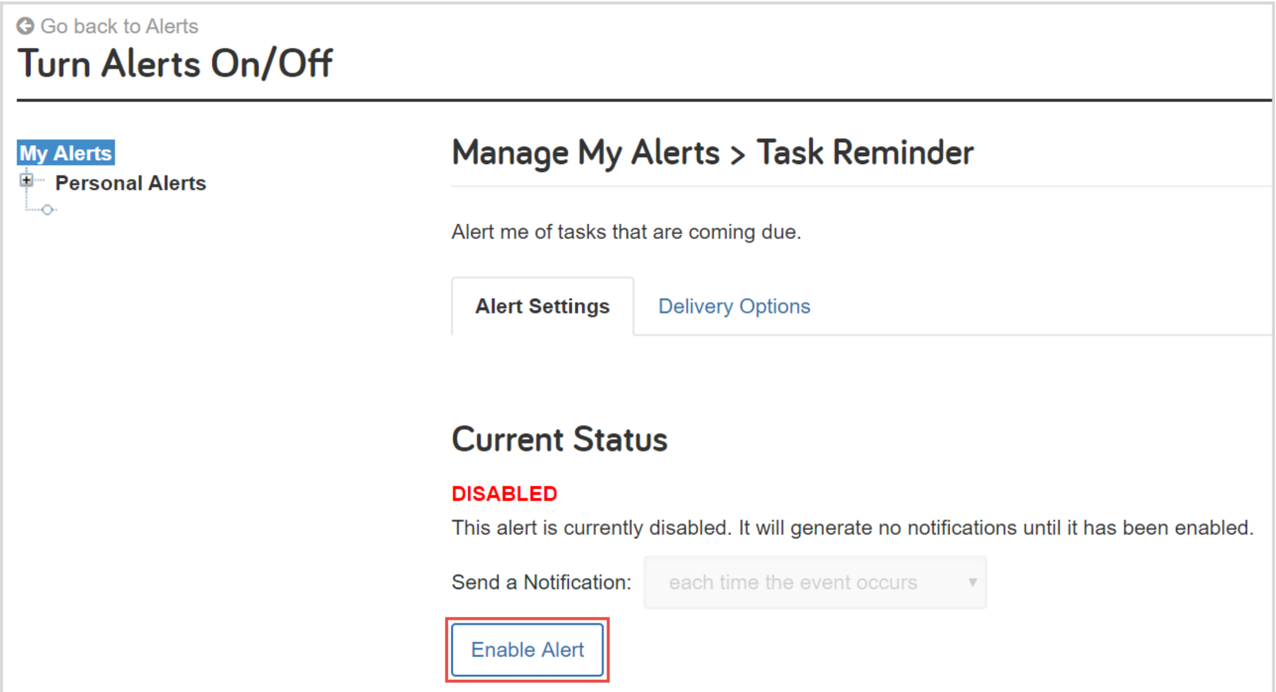
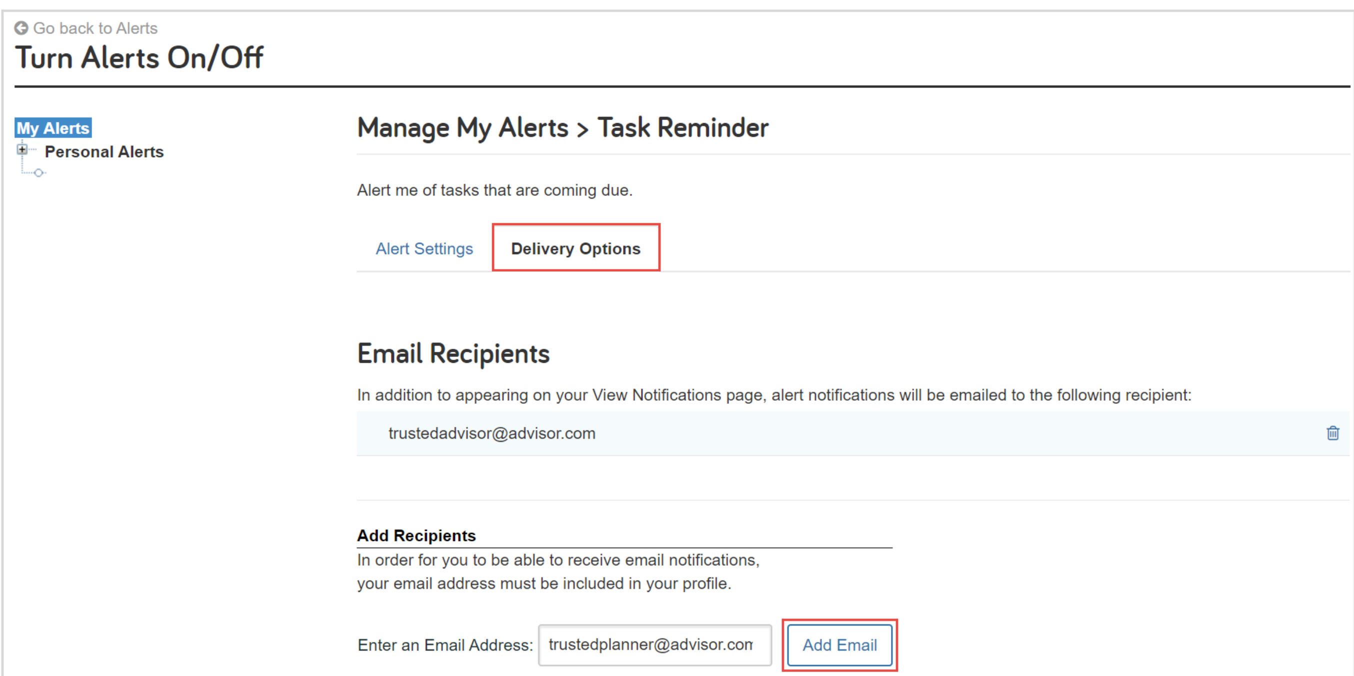
5. To enable an alert, click the alert and select **Enable Alert**. Fill in the alert parameters and click **Save**.



6. Next, click **Delivery Options**. This is where you can define what happens when an alert is triggered. You will automatically receive a notification in the Alerts drop-down and on your Financial Feed. To receive an email notification, enter the email address and click **Add Email.**



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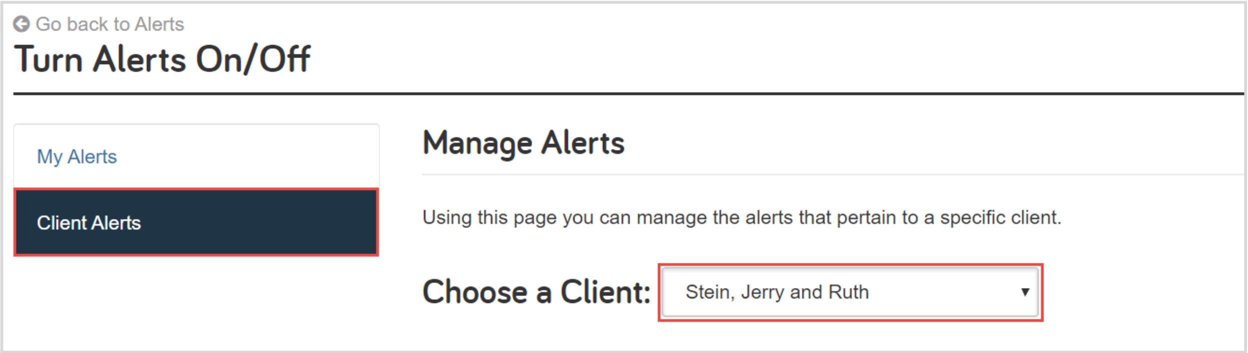
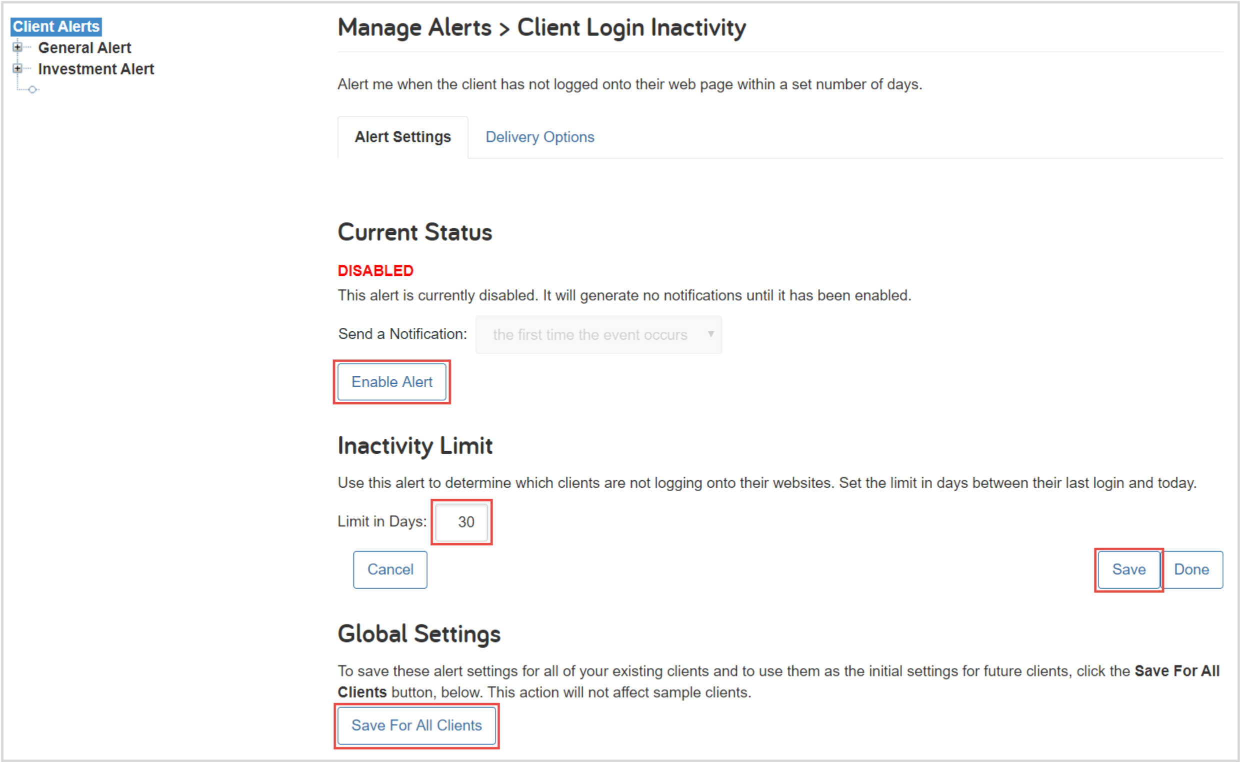
7. Click **Client Alerts** to set an alert for a specific Client. Client alerts are set on a per-Client basis but can also be saved for all. Select a Client from the Choose a Client drop-down menu to begin.



Please Note: There are two types of Client specific alerts: **General** and **Investment**. **General** alerts are relevant to the Client's website (i.e. log on status, account status, vault uploads). **Investment** alerts are related to the Client's specific investments entered in their Facts (i.e. asset value change, allocation threshold, stock option expiration).

8. Select the alert to be enabled and click **Enable Alert**. Complete the alert parameters, then click **Save**. If you'd like to enable this alert for your existing Clients and future Clients, click **Save For All Clients.**



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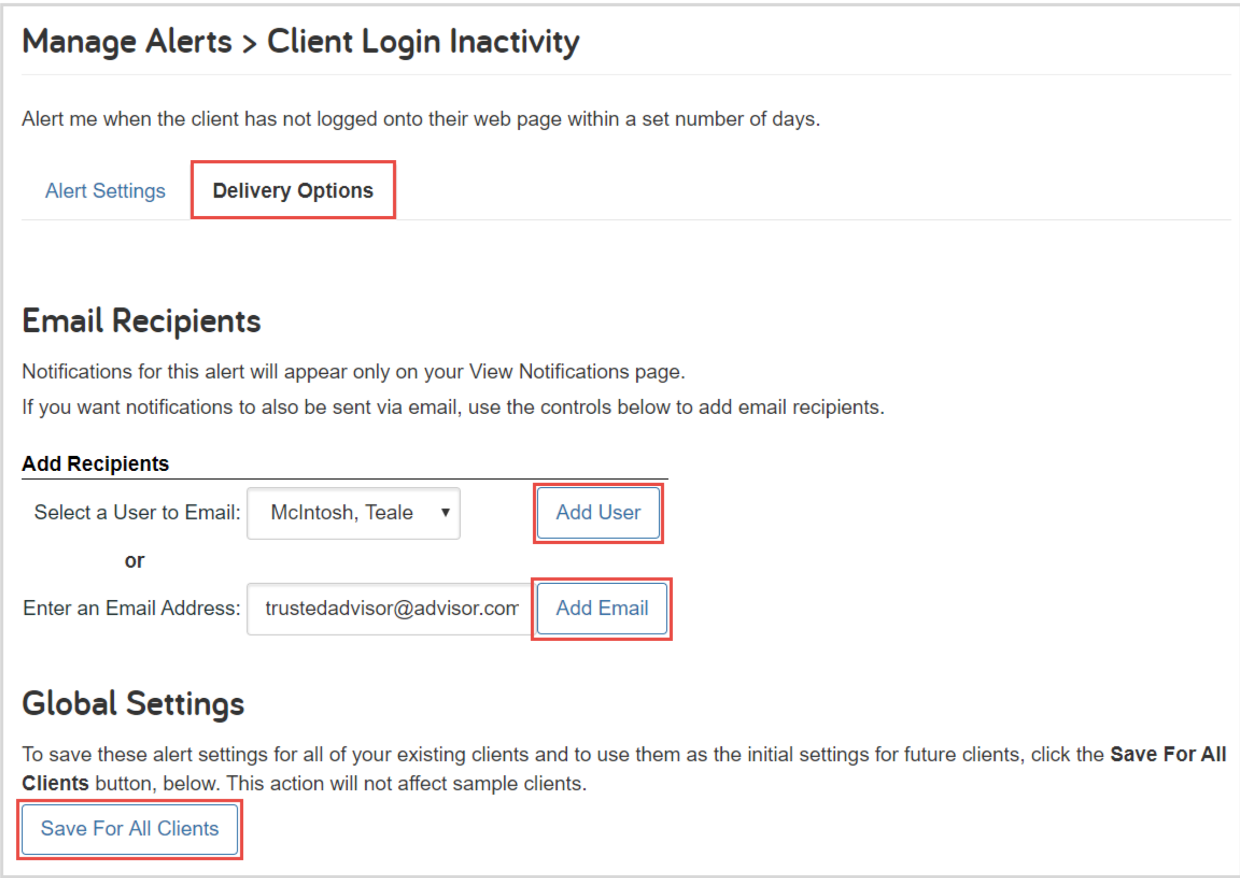
9. Next, click **Delivery Options**. This is where you can define what happens when an alert is triggered. You will automatically receive a notification in the Alerts drop-down and on your Financial Feed.

   To receive an email notification, select a user from the Add Recipients drop-down menu, then click **Add User**. Or, enter an email address and click **Add Email.** To save these delivery settings for your existing Clients and for future Clients, click **Save For All Clients.**



Please Note: Alerts can also be easily enabled or disabled by clicking on the **Bell Icon** in the Manage Client Alerts page. See screen shot below. A **red** bell indicates a triggered alert, **gold** is an enabled alert, and shaded **blue** is a disabled alert.