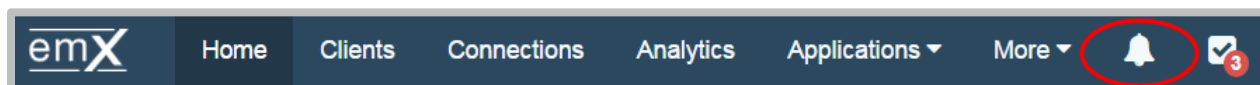
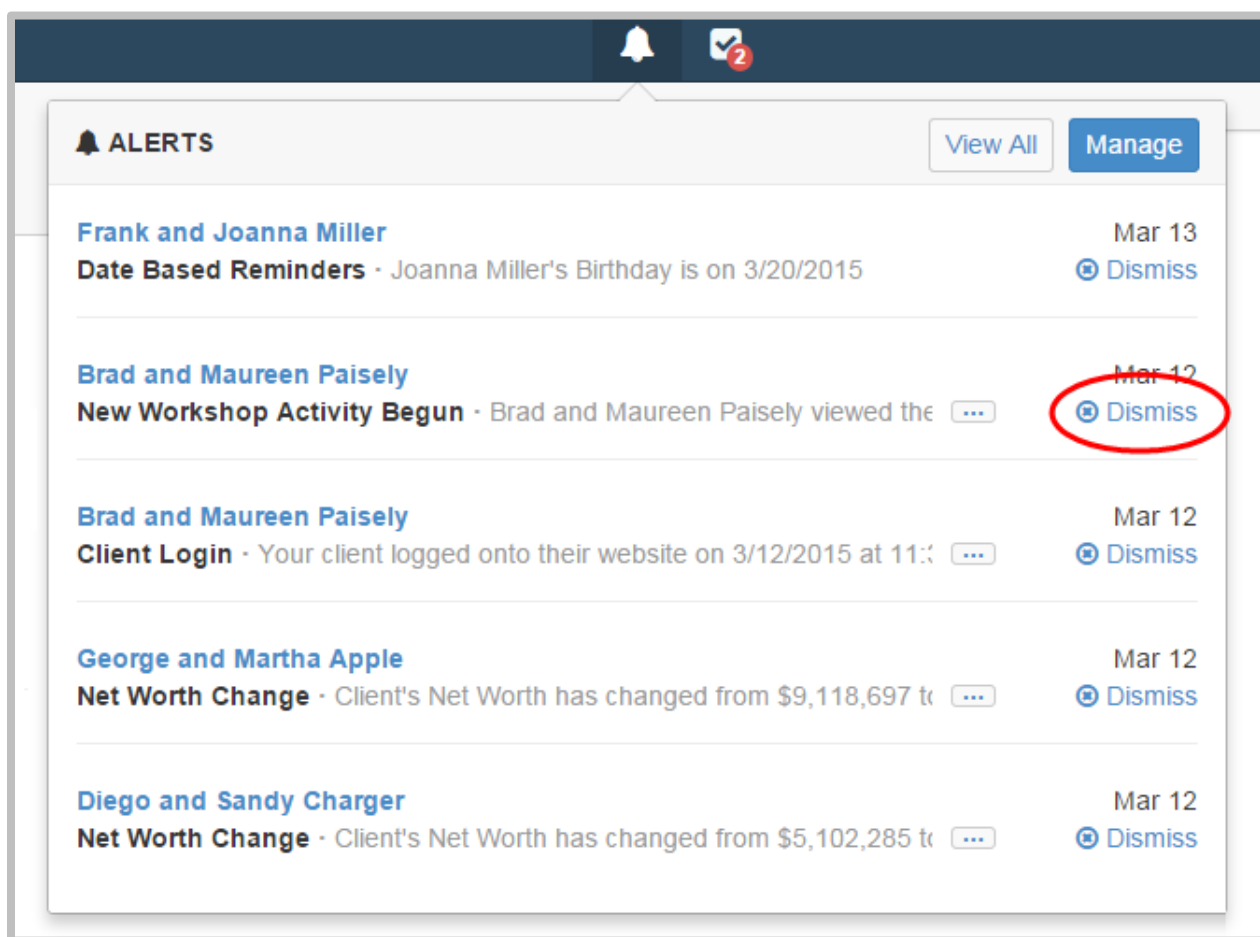


In this user guide, we will demonstrate how to set up **alerts**.

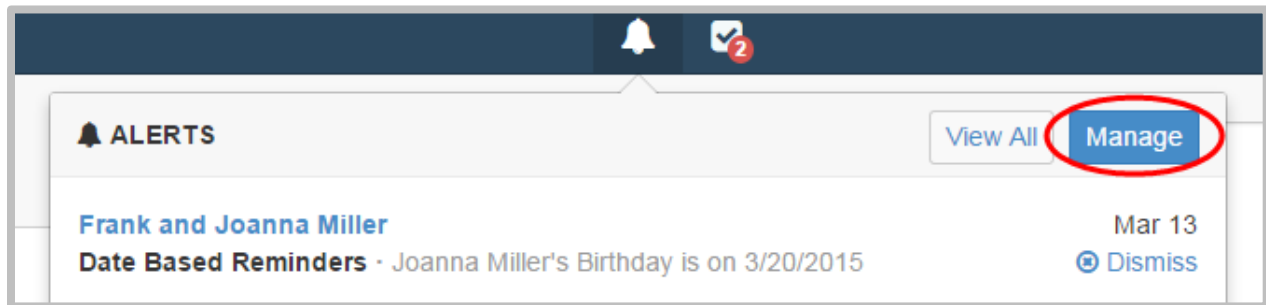
1. Click the **Bell icon** that appears in the Navigation Bar.



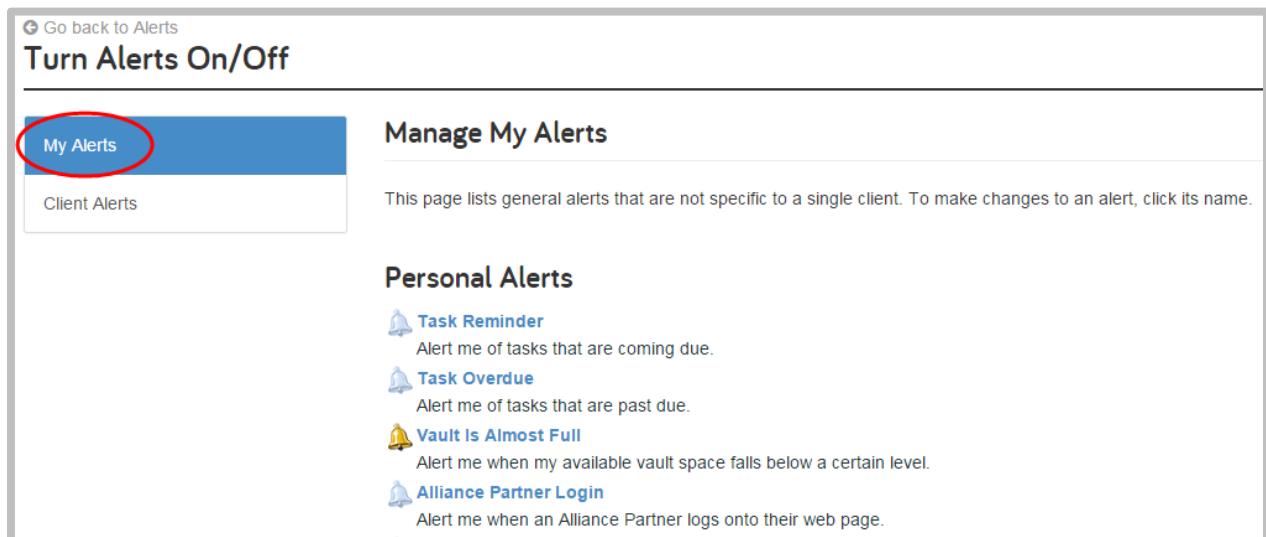
2. The modal that appears will list out any alerts currently triggered. To dismiss a triggered alert, click the **Dismiss** button to the right of the selected alert.



- To manage Advisor and Client specific alerts, click **Turn Alerts On/Off**.



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



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

The screenshot shows the 'Turn Alerts On/Off' page for 'Alliance Partner Vault Upload'. On the left, there is a sidebar with 'My Alerts' (selected) and 'Client Alerts'. The main content area has a breadcrumb 'Manage My Alerts > Alliance Partner Vault Upload'. Below this, it says 'Alert me when an Alliance Partner uploads a file to any of my clients' vaults.' There are two radio buttons: 'Alert Settings' (selected) and 'Delivery Options'. Under 'Current Status', it says 'DISABLED' in red and 'This alert is currently disabled. It will generate no notifications until it has been enabled.' Below that, there is a dropdown menu for 'Send a Notification:' set to 'each time the event occurs'. At the bottom, the 'Enable Alert' button is circled in red.

- Next, click the **Delivery Options** radio button. This is where to define what happens when an alert is triggered. You will automatically receive a notification in the Alerts drop down. To receive an email notification, enter the email address and click **Add Email**.

The screenshot shows the 'Manage My Alerts > Task Reminder' page. It says 'Alert me of tasks that are coming due.' There are two radio buttons: 'Alert Settings' and 'Delivery Options' (circled in red). Under 'Email Recipients', it says 'In addition to appearing on your View Notifications page, alert notifications will be emailed to the following recipient:' and lists 'Advisor, West (westtrainingteam@emoneyadvisor.com)'. At the bottom, there is an 'Add Recipients' section with an input field for 'Enter an Email Address:' containing 'hannahp@emoney.com' and an 'Add Email' button circled in red.

- Click **Client Alerts** to set an alert for a specific client. Client alerts are set on a per-client basis. Select a client from the Choose a Client drop down menu.

Go back to Alerts

Turn Alerts On/Off

My Alerts

Client Alerts

Manage Alerts

Using this page you can manage the alerts that pertain to a specific client.

Choose a Client: Miller, Frank and Joanna

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

- Select the alert to be enabled and click **Enable Alert**.

Manage Alerts > Client Login Inactivity

Alert me when the client has not logged onto their web page within a set number of days.

● Alert Settings
 ● Delivery Options

Current Status

DISABLED

This alert is currently disabled. It will generate no notifications until it has been enabled.

Send a Notification: the first time the event occurs

Enable Alert

Inactivity Limit

Use this alert to determine which clients are not logging onto their websites. Set the limit in days between their last login and today.

Limit in Days: 30

Cancel
Save Done

9. Complete alert parameters and click **Save**.

Manage Alerts > Client Login Inactivity

Alert me when the client has not logged onto their web page within a set number of days.

● Alert Settings ● Delivery Options

Current Status

DISABLED

This alert is currently disabled. It will generate no notifications until it has been enabled.

Send a Notification: the first time the event occurs ▼

Enable Alert

Inactivity Limit

Use this alert to determine which clients are not logging onto their websites. Set the limit in days between their last login and today.

Limit in Days: 30

Cancel
Save
Done

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.

General Alerts

- 🔔 **Client Login**
 Alert me when the client logs onto their web page.
- 🔔 **Client Login Inactivity**
 Alert me when the client has not logged onto their web page within a set number of days.
- 🔔 **New Workshop Activity Begun**
 Alert me when a client begins a new activity in the Financial Workshop.
- 🔔 **Age Based Reminders**
 Alert me when my client turns a certain age.
- 🔔 **Date Based Reminders**
 Alert me when my client's important dates are nearing.