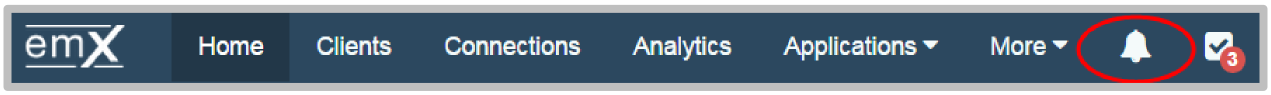
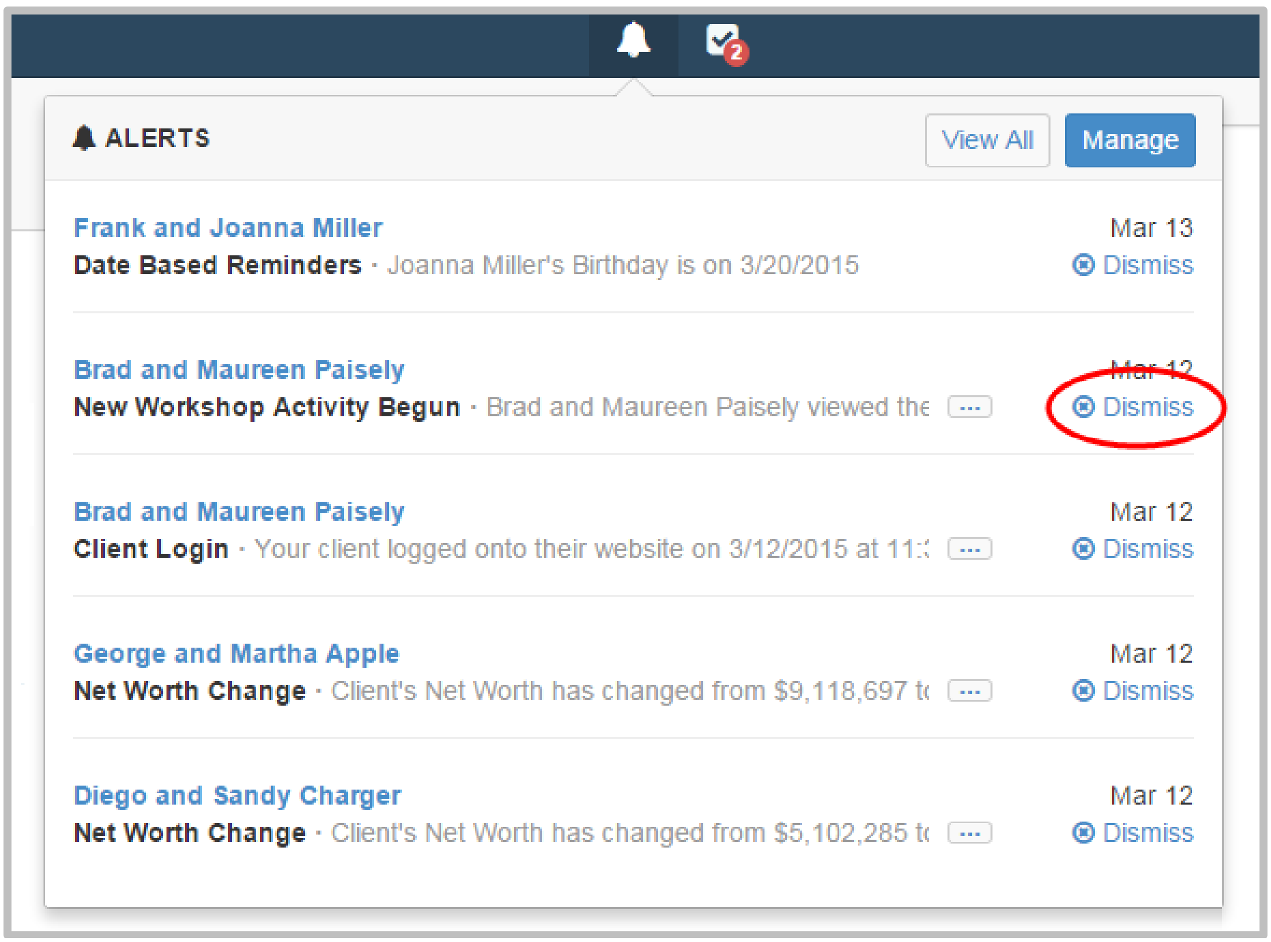
In this user guide, we will demonstrate how to set up **alerts**.

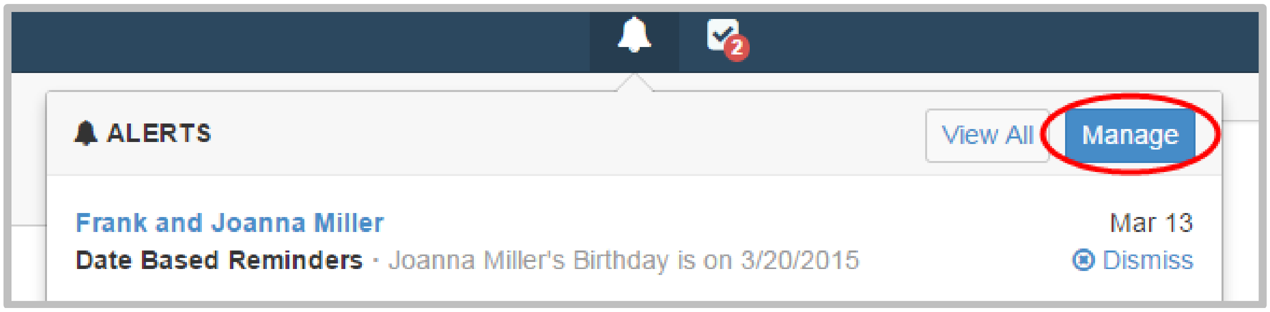
1. Click the **Bell icon** that appears in the Navigation Bar.



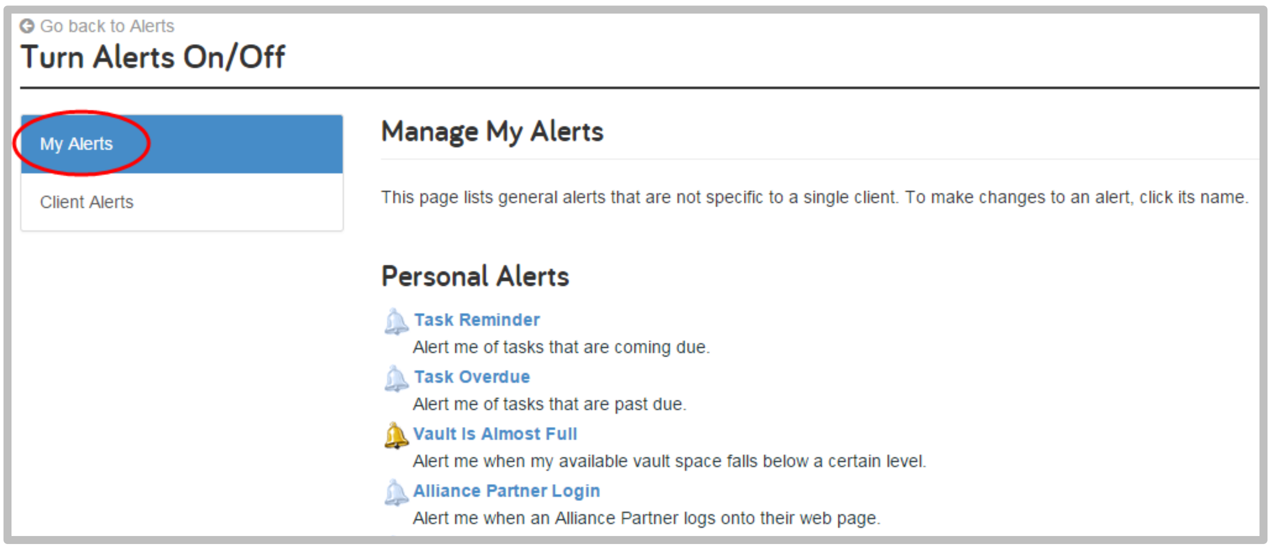
2. The modal that appears will list out any alerts currently triggered. To dismiss a triggered alert, click the **Dismiss** button to the right of the selected alert.



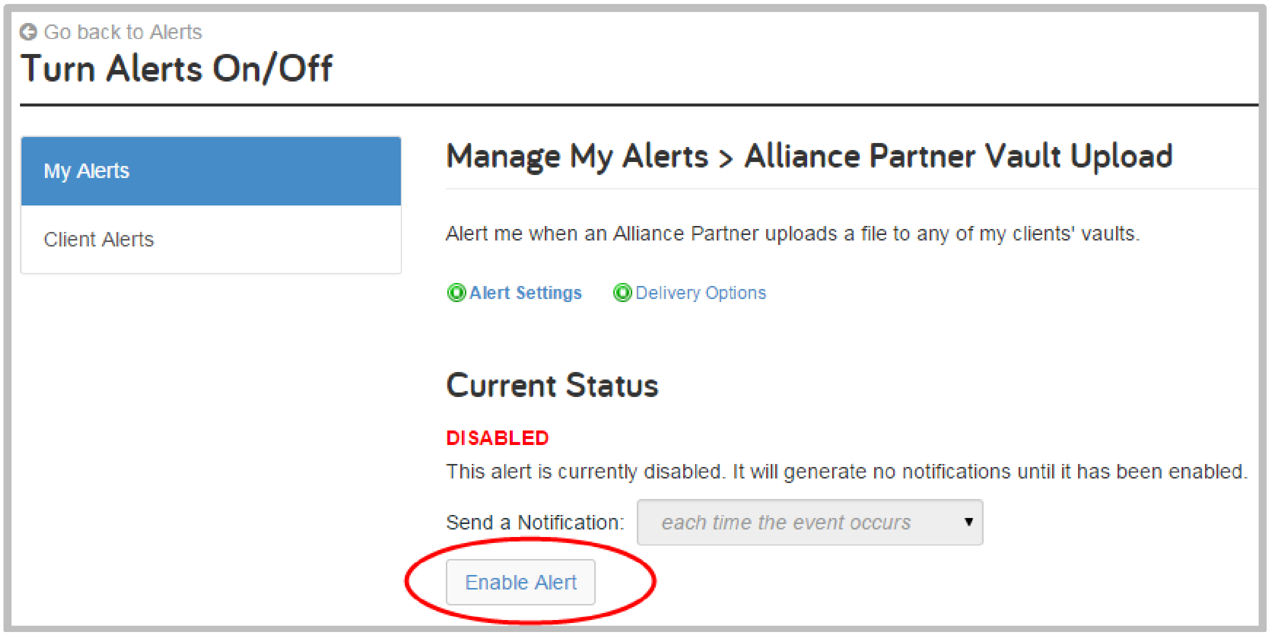
3. To manage Advisor and Client specific alerts, click **Turn Alerts On/Off.**



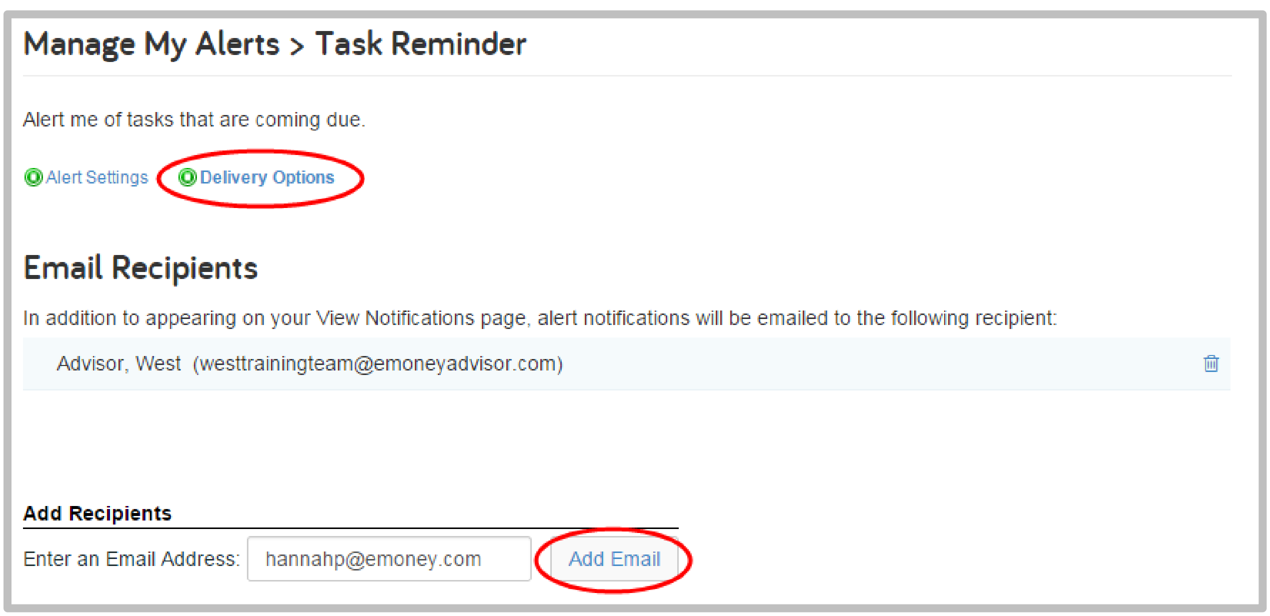
4. The **My Alerts** page lists general alerts that are not specific to a single client.



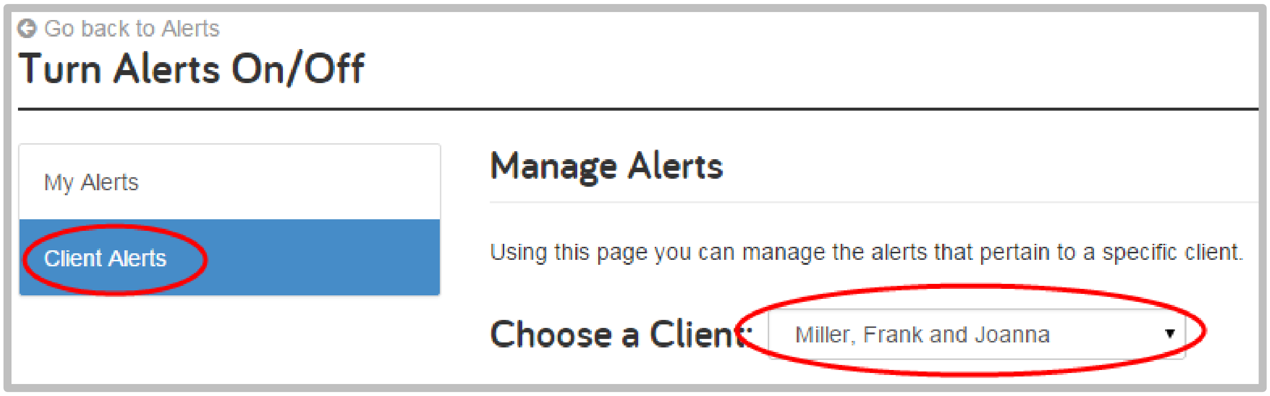
5. To enable an alert, click the alert and select **Enable Alert**. Fill in the alert parameters and click **Save**.



6. 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.**

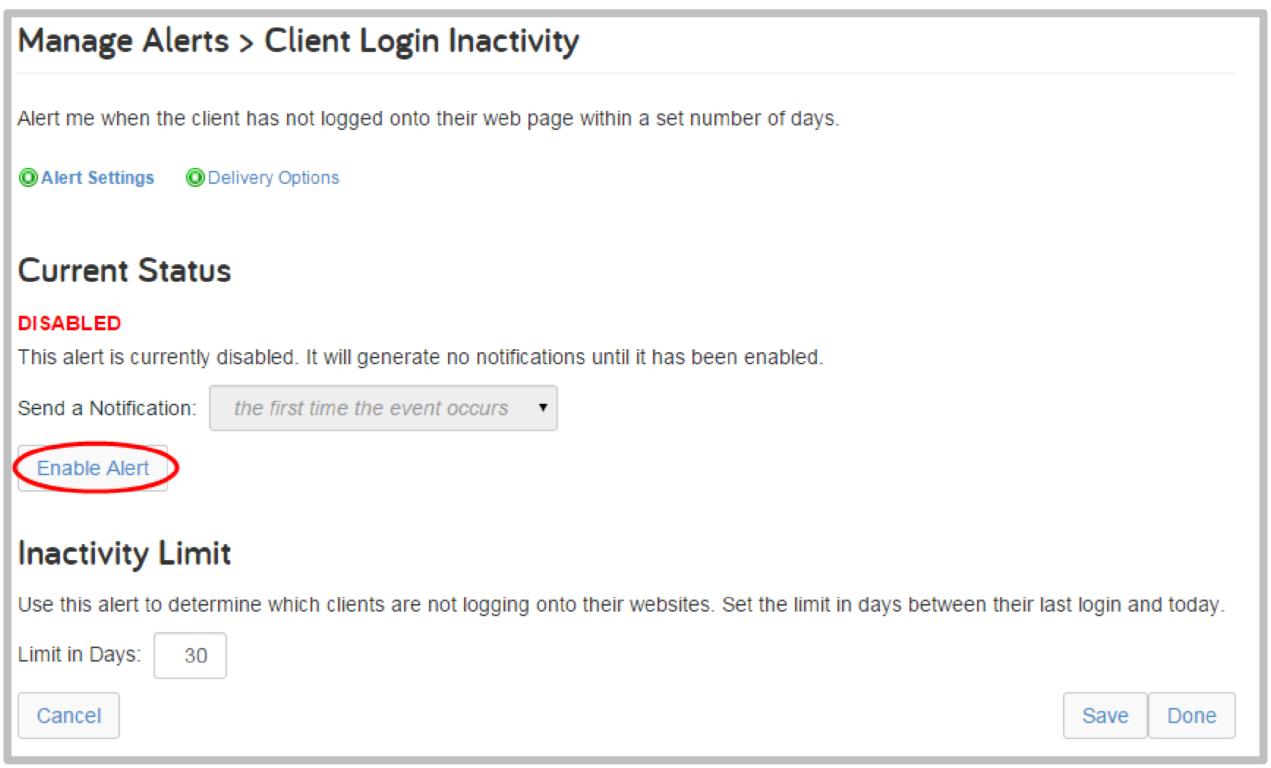


7. Click **Client Alerts** to set an alert for a specific client. Client alerts are set on a per-client basis. Select a client from the Choose a Client drop down menu.

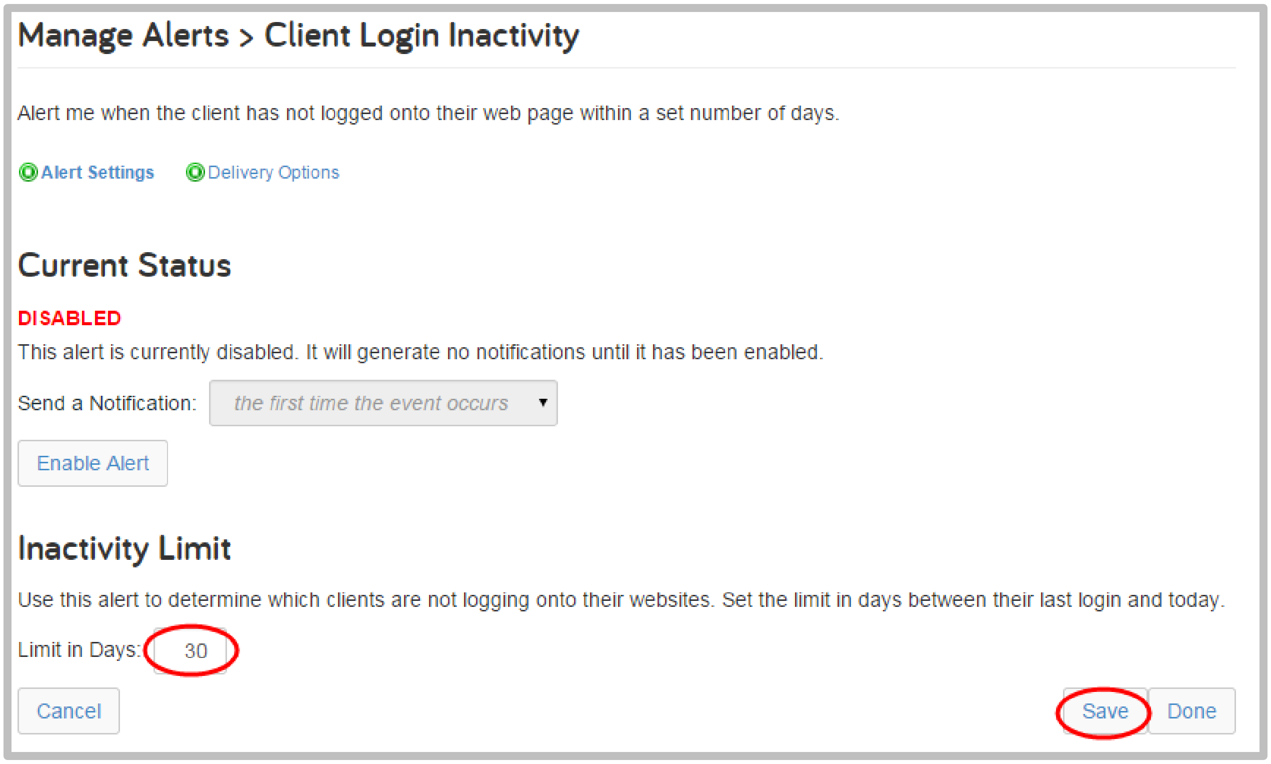


Please Note: There are two types of client specific alerts: **General** and **Investment**. **General** alerts are relevant to the client's website (Ex. log on status, account status, vault uploads). **Investment** alerts are related to the client's specific investments entered in their Facts (Ex. asset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

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



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



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.