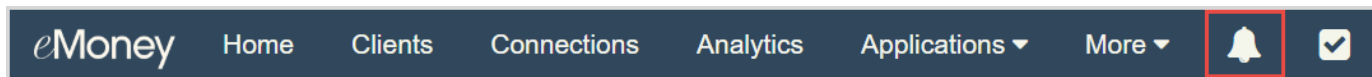


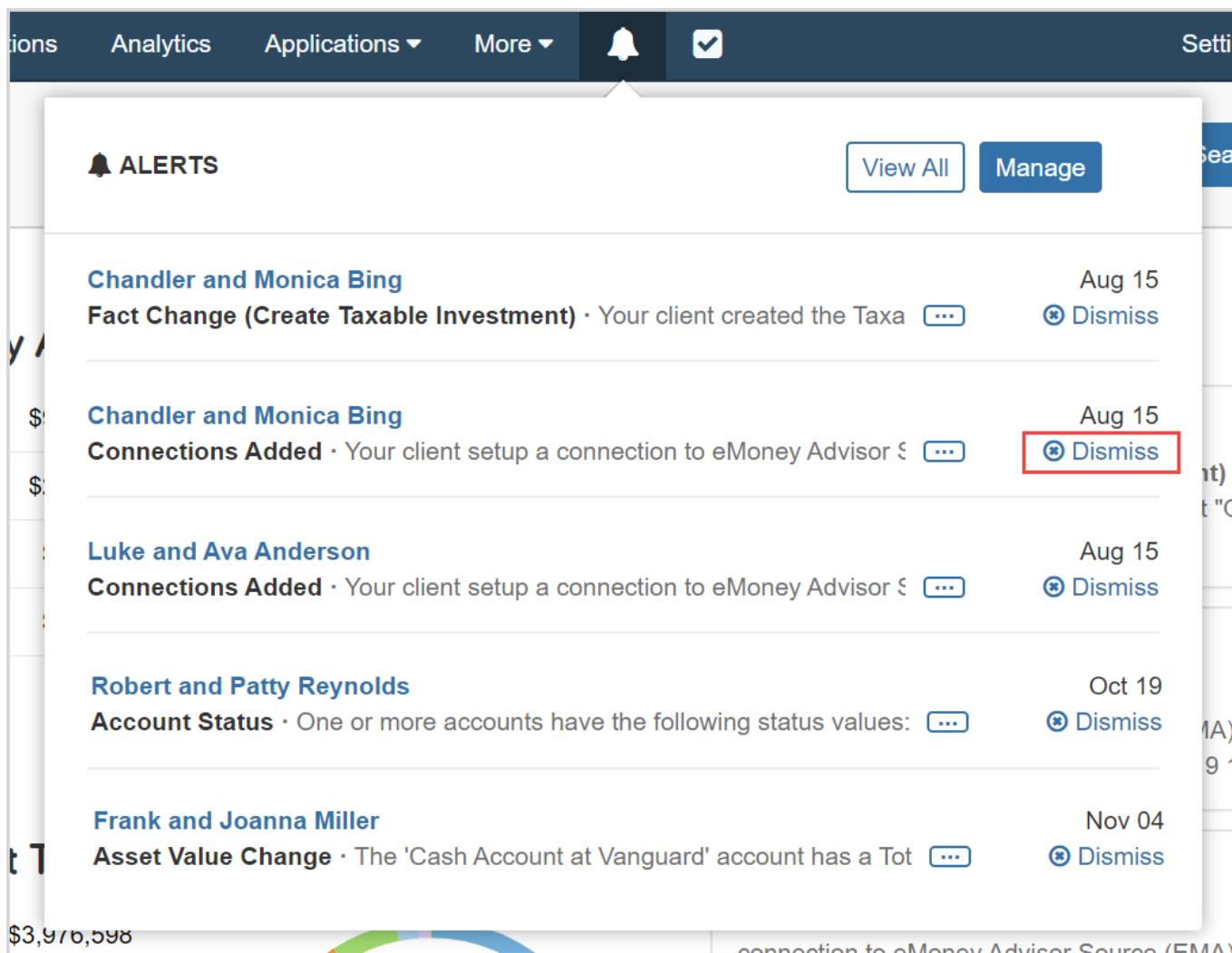
# Setting Up Alerts

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

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

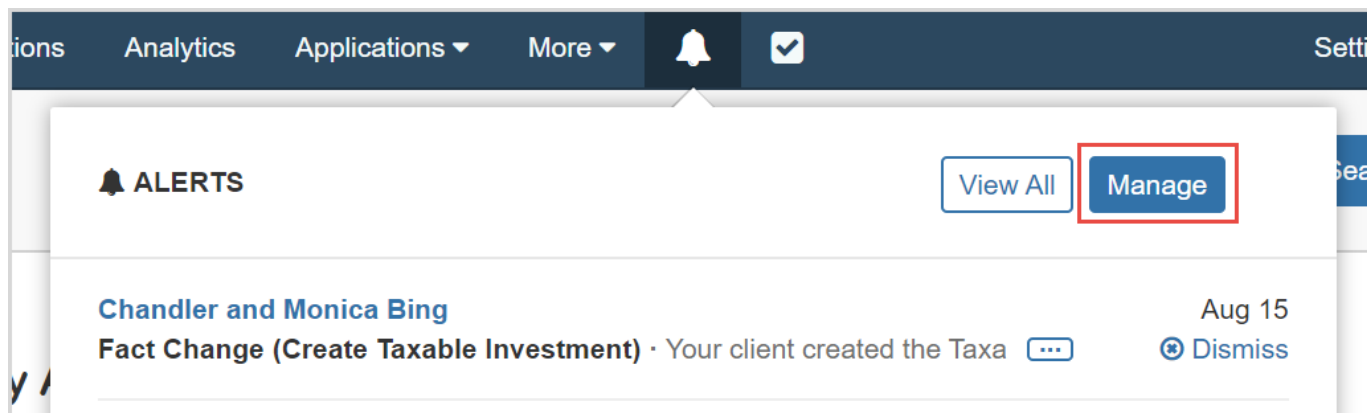


2. The list that appears will show any alerts currently triggered. To dismiss a triggered alert, click the **Dismiss** button to the right of the selected alert.

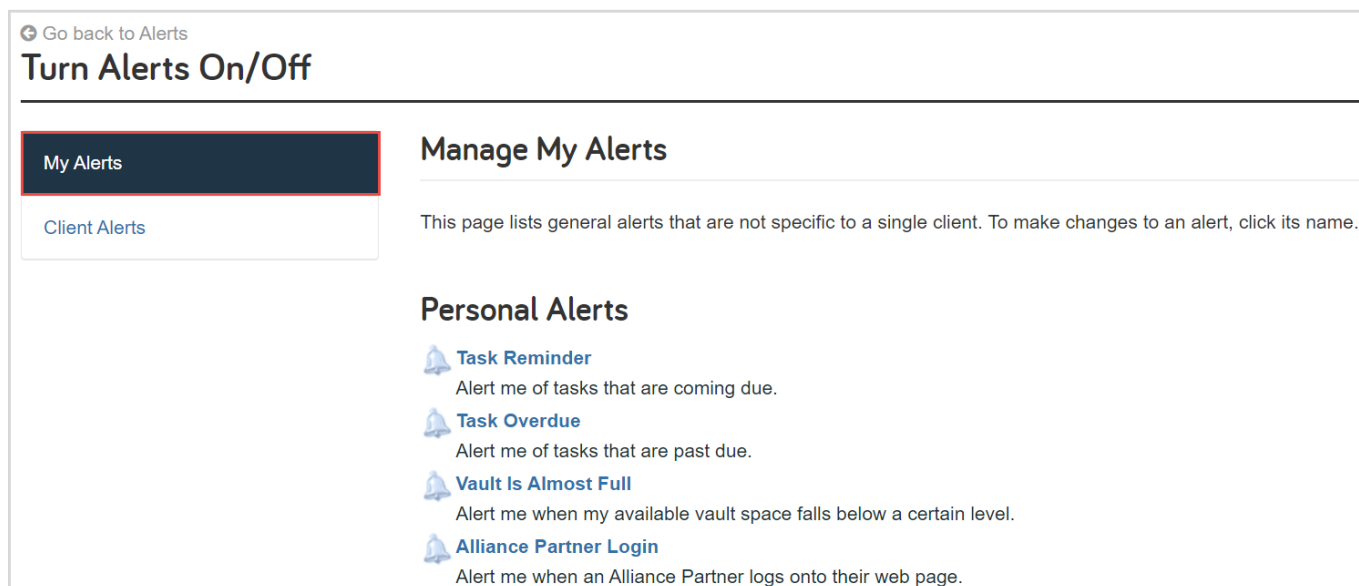


# Setting Up Alerts

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.



# Setting Up Alerts

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

[Go back to Alerts](#)

## Turn Alerts On/Off

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**My Alerts**

Personal Alerts

### Manage My Alerts > Task Reminder

Alert me of tasks that are coming due.

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:

[Enable Alert](#)

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**.

[Go back to Alerts](#)

## Turn Alerts On/Off

---

**My Alerts**

Personal Alerts

### Manage My Alerts > Task Reminder

Alert me of tasks that are coming due.

[Alert Settings](#) [Delivery Options](#)

### Email Recipients

In addition to appearing on your View Notifications page, alert notifications will be emailed to the following recipient:

### Add Recipients

In order for you to be able to receive email notifications, your email address must be included in your profile.

Enter an Email Address:  [Add Email](#)

# Setting Up Alerts

- 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.

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: Stein, Jerry and Ruth

**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).

- 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**.

Client Alerts

- General Alert
- Investment 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

### Global Settings

To save these alert settings for all of your existing clients and to use them as the initial settings for future clients, click the **Save For All Clients** button, below. This action will not affect sample clients.

Save For All Clients

## 4 | Setting Up Alerts

# Setting Up Alerts

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**.

## 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**

### Email Recipients

Notifications for this alert will appear only on your View Notifications page.  
If you want notifications to also be sent via email, use the controls below to add email recipients.

**Add Recipients**

Select a User to Email: McIntosh, Teale

or





Enter an Email Address: trustedadvisor@advisor.com

### Global Settings

To save these alert settings for all of your existing clients and to use them as the initial settings for future clients, click the **Save For All Clients** button, below. This action will not affect sample 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.

## 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.
-  **Onboarding Completed**  
Alert me when my client completes Onboarding.
-  **New Workshop Activity Begun**  
Alert me when a client begins a new activity in the Financial Workshop.