Checkpoint AU

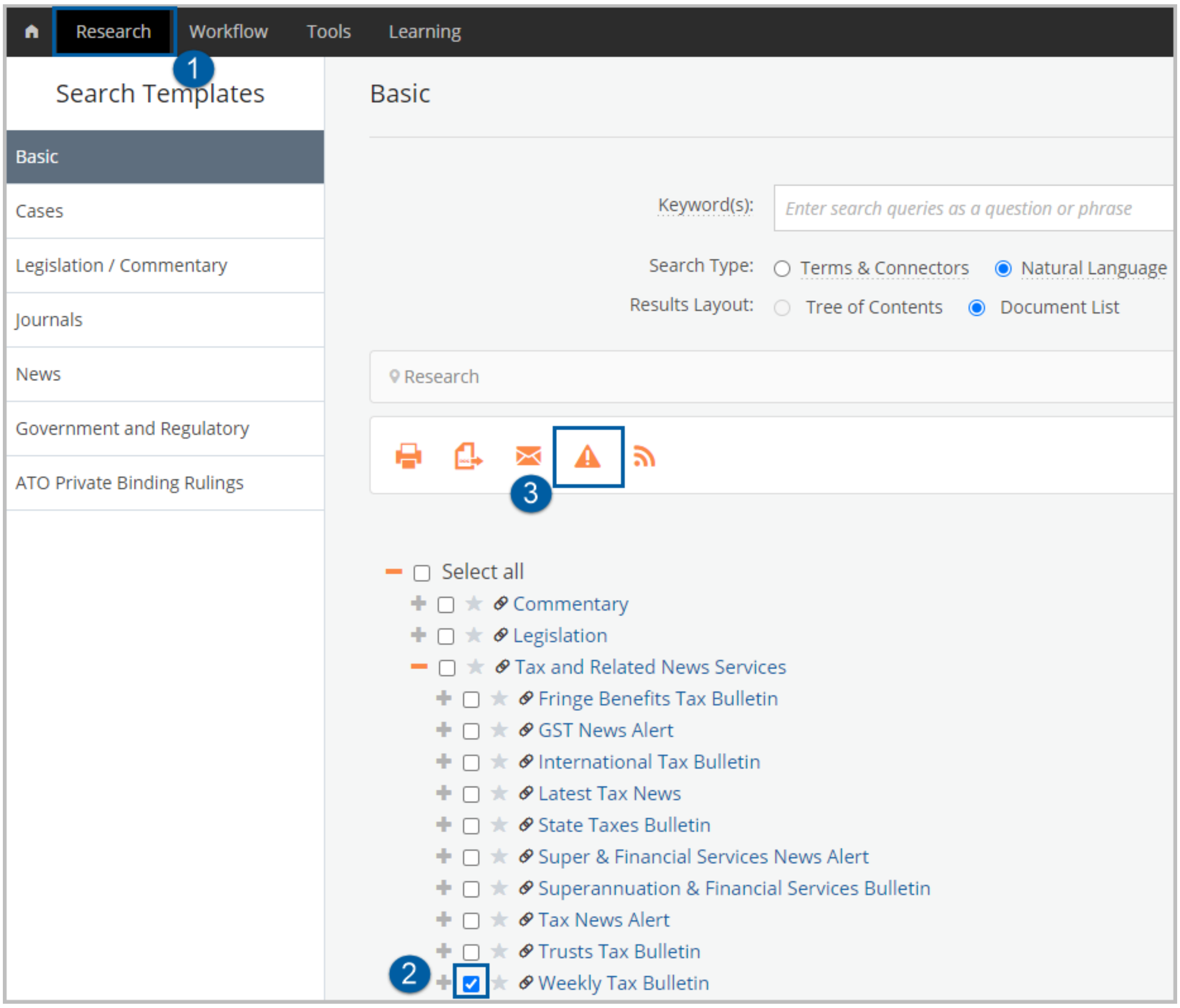
Creating and Managing a Product Alert

Product Alerts can be setup in Checkpoint to send email notifications when new documents are added to the platform. Two types of Alerts can be setup, Product Based Alerts and Search Based Alerts.

Product Based Alert

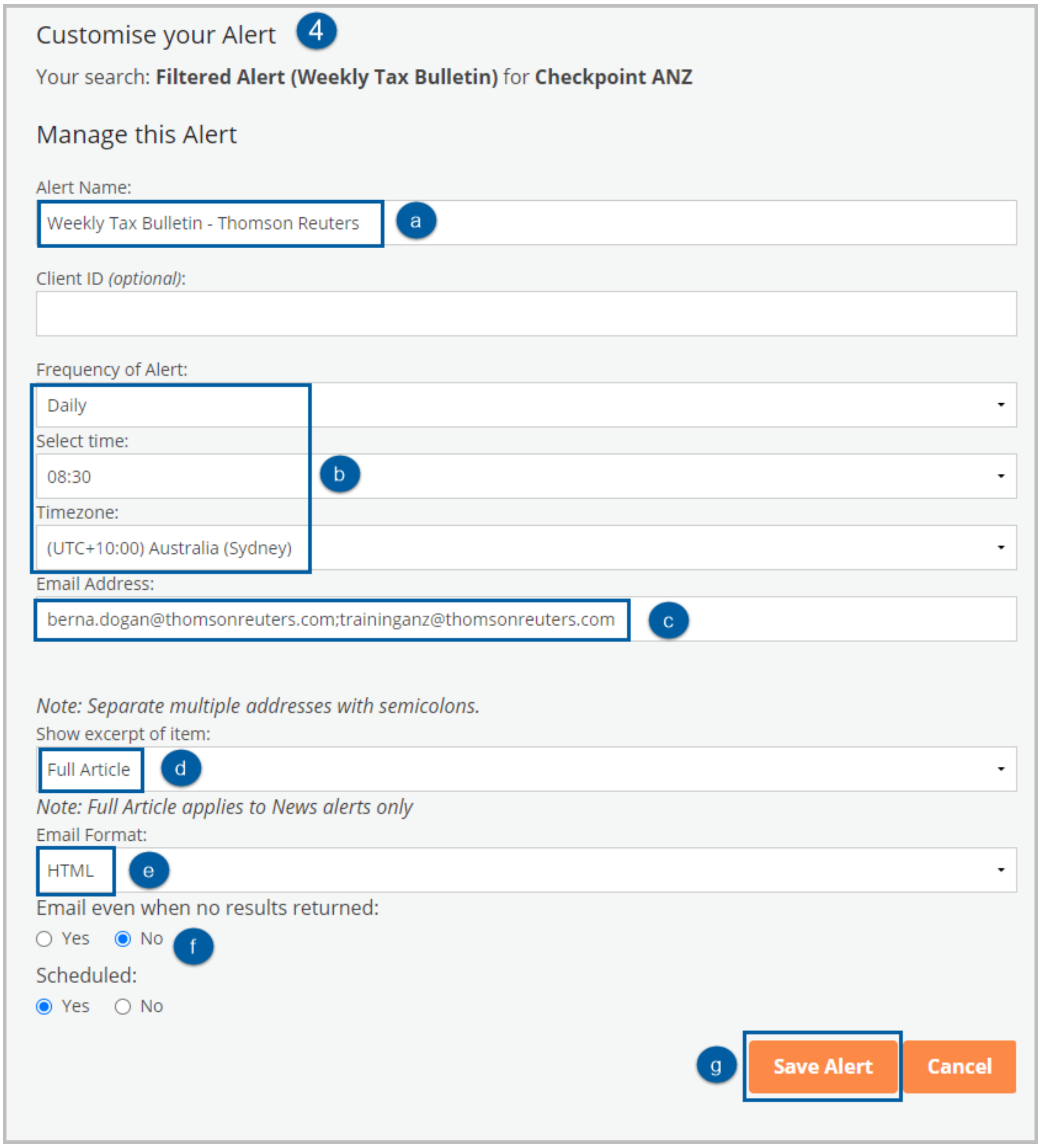
A notification is sent when new content is added to a specific product. This can be applied to any product and is especially effective when used in conjunction with News Bulletins or News Alerts.

1. Click **Research** in the navigation toolbar
   Note: Your product list is located below the search field
2. Select the **plus** symbols to navigate products and select the tick box next to the title
3. Select the **Alert** icon located in the white toolbar

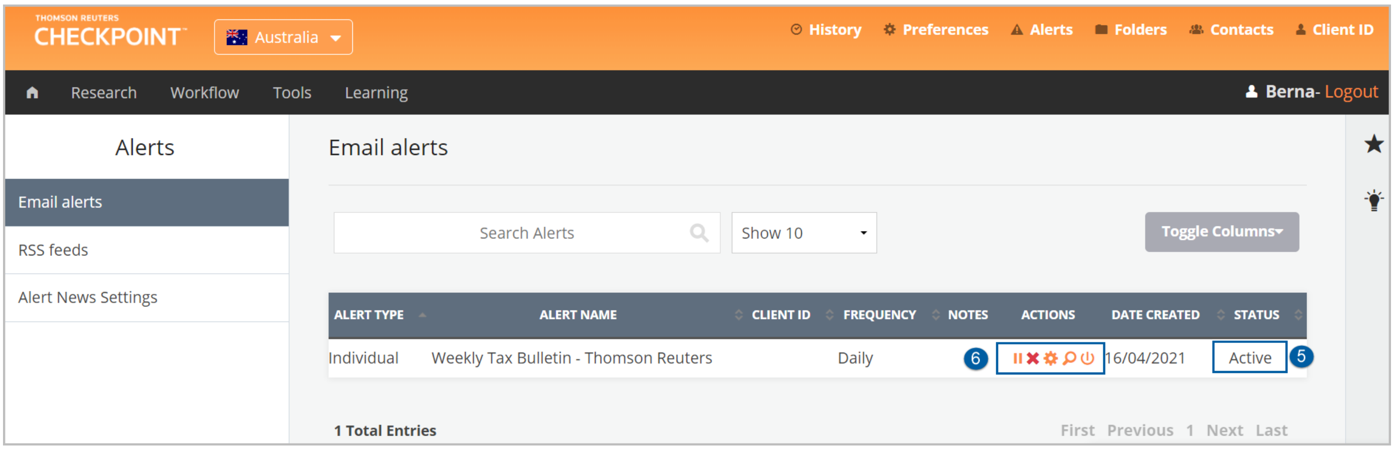


4. Customise your Alert
   a. Enter a name for the Alert
   b. Change the frequency, time, and time zone to receive the Alert, if required
   c. If your email address is not displayed, enter it now
   d. Select your preferred option from the **Show excerpt of item** dropdown menu. This can be changed at any time after the Alert is saved
      Summary – provides a brief excerpt with a link to article
      Headline only – provides title only with a link to the article
      Full article – provides the full article within your email
   e. Choose your preferred email format
      HTML – email with a list of your results
      PDF – provides a PDF attachment
      RTF – provides an RTF attachment
   f. It is recommended that you leave the option **Email even when no results returned** set to **No** – this means you will only receive an email when new results have been found.
   g. Click **Save Alert**

Note: As per the settings below, Checkpoint will run a search every day at 8.30 am for the new Weekly Tax Bulletin. When the new bulletin is picked up in the search, Checkpoint will email the complete bulletin to the email recipient(s).



5. Once saved, you will see the **Email Alerts** screen. This indicates that the Alert is saved and active.
6. You have the ability to **Edit, Suspend** or **Delete** your Alert



Managing a Product based Alert

1. Click onto the **Alerts** in the orange navigation toolbar to be directed to the **Alerts** screen.
2. Select the required action.
   a. **Suspend Alert** - stop the Alert for a set amount of time.
   b. **Delete Alert** – deletes an Alert
   c. **Edit Alert Settings** - return to the **Customise your Alert** screen, where you can make changes.
   d. **Edit Search** – allows you to add/remove products from the saved Alert
   e. **Run Search** – allows you to Run the Alert to check for new additions to the publication