

# 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

The screenshot shows the Checkpoint AU interface. The navigation toolbar at the top includes 'Research', 'Workflow', 'Tools', and 'Learning'. The 'Research' tab is selected and highlighted with a blue box and a circled '1'. Below the navigation toolbar, the 'Search Templates' section is visible, with 'Basic' selected. The 'Basic' search template is active, showing a search field with the text 'Research'. Below the search field, there is a toolbar with icons for print, download, email, alert (3), and RSS. The alert icon is highlighted with a blue box. Below the toolbar, a list of products is displayed, each with a plus sign, a star, and a checkbox. The 'Weekly Tax Bulletin' product has its checkbox checked (2).

#### 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).

### Customise your Alert 4

Your search: **Filtered Alert (Weekly Tax Bulletin) for Checkpoint ANZ**

#### Manage this Alert

Alert Name:  
 a

Client ID (optional):

Frequency of Alert:  
 ▼

Select time:  
 ▼ b

Timezone:  
 ▼

Email Address:  
 c

*Note: Separate multiple addresses with semicolons.*

Show excerpt of item:  
 ▼ d

*Note: Full Article applies to News alerts only*

Email Format:  
 ▼ e

Email even when no results returned:  
 Yes  No f

Scheduled:  
 Yes  No

g



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

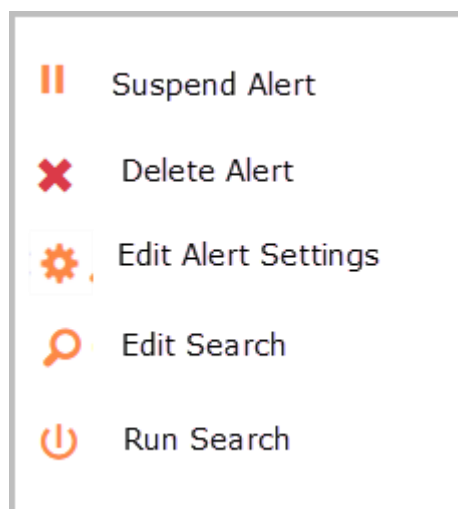
The screenshot shows the Thomson Reuters Checkpoint interface. The top navigation bar is orange and contains 'History', 'Preferences', 'Alerts', 'Folders', 'Contacts', and 'Client ID'. The left sidebar has 'Alerts' selected. The main content area is titled 'Email alerts' and features a search bar, a 'Show 10' dropdown, and a 'Toggle Columns' button. Below this is a table with the following data:

ALERT TYPE	ALERT NAME	CLIENT ID	FREQUENCY	NOTES	ACTIONS	DATE CREATED	STATUS
Individual	Weekly Tax Bulletin - Thomson Reuters		Daily		6 [Suspend] [Delete] [Edit] [Run]	16/04/2021	Active 5

At the bottom, it shows '1 Total Entries' and pagination controls: 'First Previous 1 Next Last'.

## 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



This screenshot is identical to the one above but includes annotations. A red box labeled '1' highlights the 'Alerts' link in the top navigation bar. A red box labeled '2' highlights the 'ACTIONS' column header in the table. Below the table, five small blue circles labeled 'a' through 'e' correspond to the icons in the legend box.