

In the printed form this is an uncontrolled document. The official version can be found online.

<b>Subject:</b> Adding an Alert	<b>Product:</b> Customer Loyalty Group	<b>Approved On:</b>
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**Purpose:**

Adding an alert to client's page.

**Policy:**

- An alert is a note that should be seen when the client calls in.
- Alerts are added:
  - When a permanent third-party user is authorized (form completed and uploaded to Client Files)
  - When the client has a preferred name.
  - Any other important information that must be known by an agent immediately.

**Procedure:**

1. As pictured below, scroll down until you see the *Alert* field

Primary Email  
[ssteveschlu@yahoo.com](mailto:ssteveschlu@yahoo.com)

Secondary Email

Address1  
8818 Rocker Ave

City  
Plymouth

State  
MI

Zip  
48170

Secondary Address  
8818 Rocker Ave Plymouth, MI 48170

☒ Send Reminder Email ⓘ

Has Internet? \*  
Yes ▼

Alert

[Empty text box for Alert]

2. In the Alert box, type the note that should appear in the heading
3. Click the *Save & Close* button

**Exceptions:**

None

<b>Reviewed Date:</b> 7/20/2023	<b>Page 1 of 1</b>	<b>Author:</b> Christina Borrello
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