

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

Subject: Adding an Alert	Product: Customer Loyalty Group	Approved On:
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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

The screenshot shows a client profile edit form. It includes fields for Primary Email (sseveschlu@yahoo.com), Secondary Email, Address (8818 Rocker Ave), City (Plymouth), State (MI), Zip (48170), Secondary Address (8818 Rocker Ave Plymouth, MI 48170), a checkbox for Send Reminder Email, a dropdown for Has Internet (set to Yes), and an 'Alert' text input field at the bottom. A red arrow points to the 'Alert' input field.

Primary Email sseveschlu@yahoo.com	Secondary Email		
Address 8818 Rocker Ave	City Plymouth	State MI	Zip 48170
Secondary Address 8818 Rocker Ave Plymouth, MI 48170	Has Internet?		
<input checked="" type="checkbox"/> Send Reminder Email <small>?</small>	Yes		
Alert			

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

Exceptions:

None

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