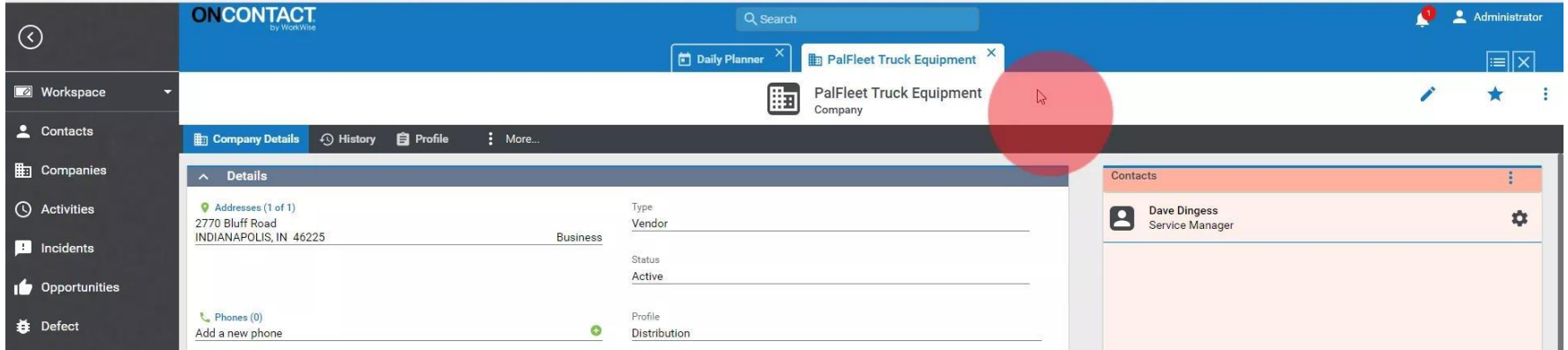
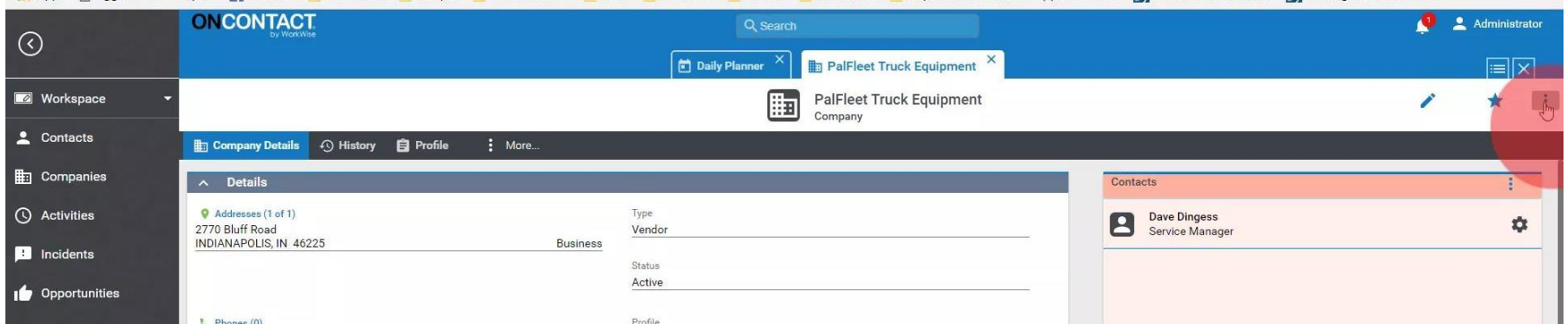


# SET A NEW ALERT

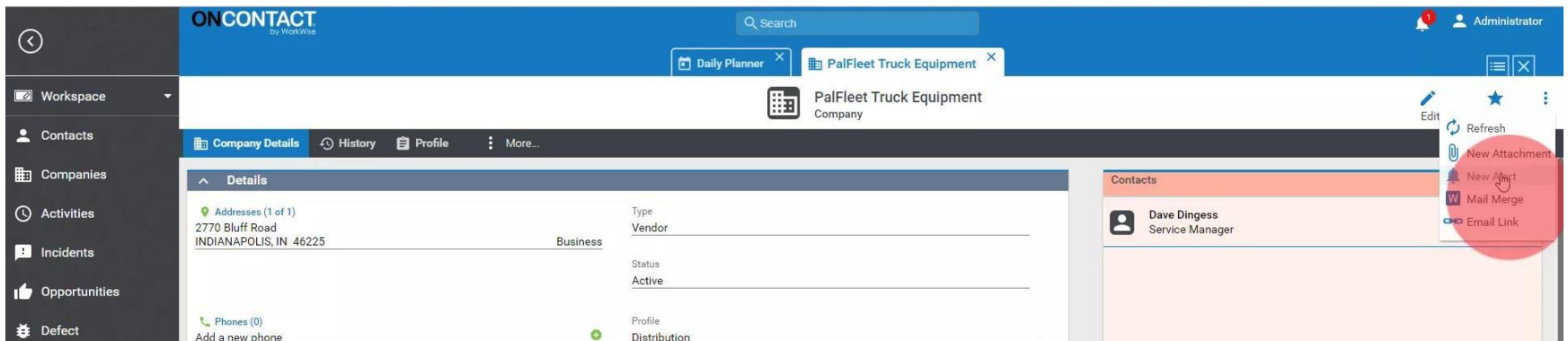
1. You can set an alert on any record. We selected a Company record.



2. Click Options



3. Choose new Alert



#### 4. Add a description

The screenshot shows the ONCONTACT interface with the 'Company Details' view for 'PalFleet Truck Equi' selected. The 'Add Alert' dialog box is open, showing the following fields:

- Audience (1 of 1):** Administrator
- Expiration Date:** <MM/DD/YYYY>
- Description:** (no value) - This field is highlighted with a red circle and has a red error message: "Description is required."
- Notes:** A section with a plus icon and a vertical ellipsis.

#### 5. Add an expiration date or notes if desired

The screenshot shows the ONCONTACT interface with the 'Company Details' view for 'PalFleet Truck Equi' selected. The 'Add Alert' dialog box is open, showing the following fields:

- Audience (1 of 1):** Administrator
- Expiration Date:** <MM/DD/YYYY>
- Description:** PalFleet on Credit Hold
- Notes:** A section with a plus icon and a vertical ellipsis. A red circle highlights this section with a vertical cursor.

## 6. Click to Save

The screenshot shows the ONCONTACT interface with the 'Add Alert' dialog box open. The dialog box has a title bar with a close button and the text 'Add Alert'. Below the title bar, there is a section for 'Alert' with the following fields:

- Audience (1 of 1): Administrator
- Expiration Date: <MM/DD/YYYY>
- Description: PalFleet on Credit Hold

Below the 'Alert' section, there is a section for 'Notes' with the following text:

Contact accounting for updated information

A red circle highlights the close button in the top right corner of the dialog box.

## 7. The red circle icon indicates that this record has an alert, Click to view

The screenshot shows the ONCONTACT interface with a company record for 'PalFleet Truck Equipment' selected. A red circle with a white exclamation mark icon is overlaid on the record, indicating an alert. The record details are as follows:

Addresses (1 of 1)	Type
2770 Bluff Road INDIANAPOLIS, IN 46225	Vendor

Status
Active

Profile
Distribution

Representatives (1 of 1)
Henry Barker

The 'Contacts' sidebar on the right shows 'Dave Dingess, Service Manager' with a gear icon.

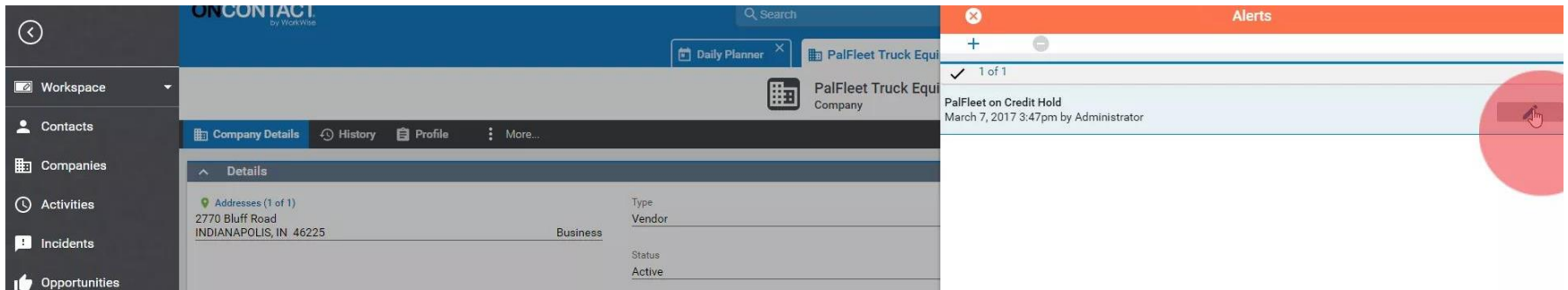
## 8. Click to open and see detail or remove the Alert

The screenshot shows the ONCONTACT interface with the 'Alerts' list for the 'PalFleet Truck Equipment' company record. The list shows one alert:

Alerts
✓ 0 of 1 PalFleet on Credit Hold March 7, 2018 3:47pm by Administrator

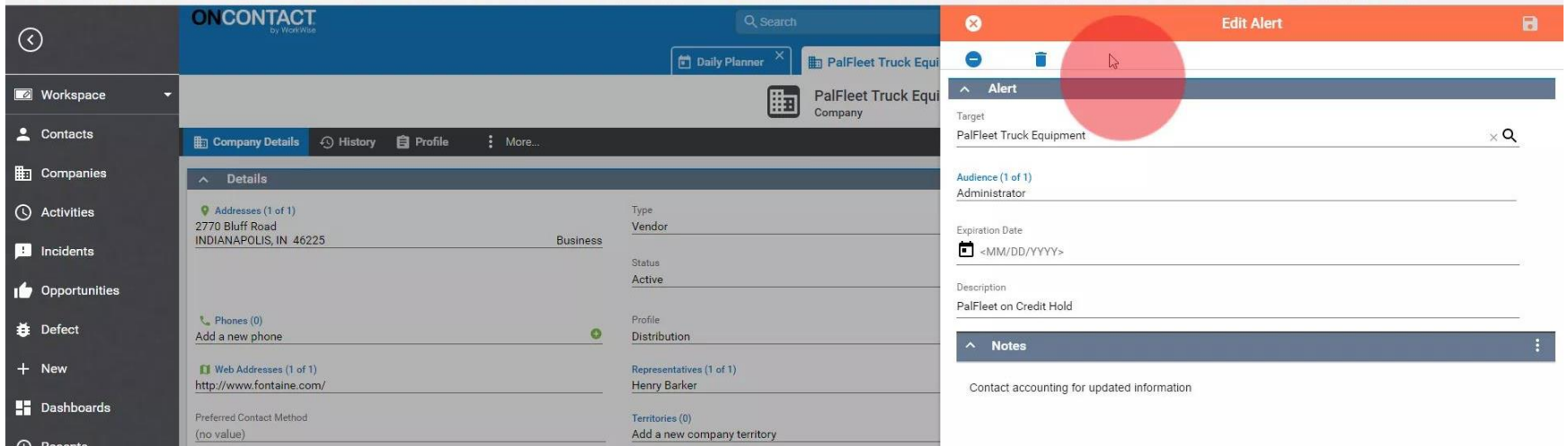
A red circle highlights the alert entry.

## 9. Click to Edit if you need to modify the alert or remove it



The screenshot shows the ONCONTACT interface. On the left is a navigation sidebar with options: Workspace, Contacts, Companies, Activities, Incidents, and Opportunities. The main area displays the 'Company Details' for 'PalFleet Truck Equipment'. The details include: Addresses (1 of 1) at 2770 Bluff Road, INDIANAPOLIS, IN 46225, Type: Vendor, Status: Active, and Business. On the right, an 'Alerts' window is open, showing a single alert: 'PalFleet on Credit Hold' dated March 7, 2017 3:47pm by Administrator. A red circle highlights the edit/delete icon in the top right corner of the alert card.

## 10. You can edit or click the delete icon to remove it



The screenshot shows the 'Edit Alert' form in the ONCONTACT interface. The left sidebar is the same as in the previous image. The main area shows the 'Company Details' for 'PalFleet Truck Equipment'. The details include: Addresses (1 of 1) at 2770 Bluff Road, INDIANAPOLIS, IN 46225, Type: Vendor, Status: Active, Business, Profile: Distribution, Henry Barker, Representatives (1 of 1) Henry Barker, and Territories (0) Add a new company territory. On the right, the 'Edit Alert' form is open. The form fields are: Target: PalFleet Truck Equipment, Audience (1 of 1) Administrator, Expiration Date: <MM/DD/YYYY>, and Description: PalFleet on Credit Hold. A 'Notes' section at the bottom contains the text: 'Contact accounting for updated information'. A red circle highlights the edit/delete icon in the top right corner of the alert card.