

Checkpoint

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 displays the Checkpoint Research interface. The top navigation bar includes 'Research' and 'Tools'. On the left, a sidebar lists 'Search Templates' with categories: Basic, Cases, Legislation / Commentary, Journals, News, Government and Regulatory, and Forms and Precedents. The main area is titled 'Basic' and contains a search field with the placeholder 'Enter keywords, provisions and citations'. Below the search field are options for 'Search Type' (Terms & Connectors selected, Natural Language) and 'Results Layout' (Tree of Contents, Document List selected). A toolbar below the search field includes icons for print, share, email, alert (highlighted with a blue box and circled '3'), and RSS. Below the toolbar is a list of products with expand/collapse (+/-) and star icons. The 'Tax Acts' product is expanded, and its checkbox is checked (highlighted with a blue box and circled '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. Select the **Yes** to schedule the alert
- h. Click **Save Alert**

Note: As per the settings below, Checkpoint will run a search every day at 8.30 am for the alert selected. 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 (Tax Acts, Subject Indexes, Current Acts, Repealed Acts - plus 2 more)** for **Checkpoint ANZ**

Manage this Alert

Alert Name:
 a

Client ID (optional):

Frequency of Alert:
 b

Select time:

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

h

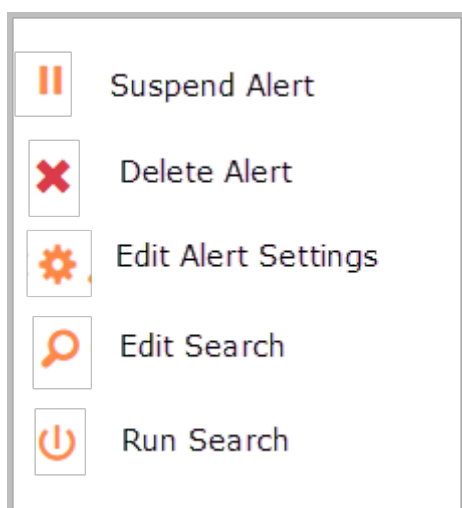


5. Once saved, you will see the **Email Alerts** screen. This indicates that the Alert is saved and active.
6. You can **Edit, Suspend** or **Delete** your Alert

ALERT TYPE	ALERT NAME	CLIENT ID	FREQUENCY	NOTES	ACTIONS	DATE CREATED	STATUS
Individual	Tax Legislation		Daily	6	    	11/05/2021	5 Active

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



THOMSON REUTERS CHECKPOINT New Zealand






History Preferences Alerts Folders Contacts Client ID

Research Tools Berna Logout

Alerts

Email alerts

Search Alerts Show 10 Toggle Columns

ALERT TYPE	ALERT NAME	CLIENT ID	FREQUENCY	NOTES	ACTIONS	DATE CREATED	STATUS
Individual	Tax Legislation		Daily		    	11/05/2021	Active

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