

Checkpoint

Creating and Managing a Search Alert

Search Alerts can be setup in Checkpoint to send email notifications when new content is added to the platform. Two types of Alerts can be setup, **Product Based Alerts** and **Search Based Alerts**.

Search Based Alert

A notification is sent when new content is added to a Checkpoint that matches your search criteria. This can be applied to any search and is especially effective when used in conjunction with News Bulletins or News Alerts.

1. Run a Search
2. Select the **Alert** icon located in the white toolbar

The screenshot displays the Checkpoint search interface. On the left is a 'Search Summary' sidebar with options like 'Edit Search', 'New Search', and 'Filter your Search'. The main area shows a search bar with the placeholder 'Type keywords here to refine search' (marked with a '1'). Below the search bar is a toolbar with various icons, including a red triangle with an exclamation mark (marked with a '2'), which represents the alert function. The search results area shows a document titled 'Tip 106: Government assistance - 25 May 2020' with details on content type, document path, and hit terms.

3. **Customise your Alert** screen.
 - a. Enter a name for the Alert
 - b. Change the frequency of 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 any documents that have been added that contain the term(s) entered. If a new document(s) is picked up in the search, Checkpoint email the document(s) details to the recipient(s).

Customise your Alert 3Your search: **Free Text (job & keeper)** for **Checkpoint ANZ**

Manage this Alert

Alert Name:

Job & Keeper a

Client ID (optional):

Frequency of Alert:

Daily

Select time:

08:30 b

Timezone:

(UTC+12:00) New Zealand

Email Address:

berna.dogan@thomsonreuters.com;traininganz@thomsonreuters.com c*Note: Separate multiple addresses with semicolons.*

Show excerpt of item:

Summary d*Note: Full Article applies to News alerts only*

Email Format:

HTML e

Email even when no results returned:

 Yes No f

Scheduled:

 Yes Nog

Save Alert

Cancel

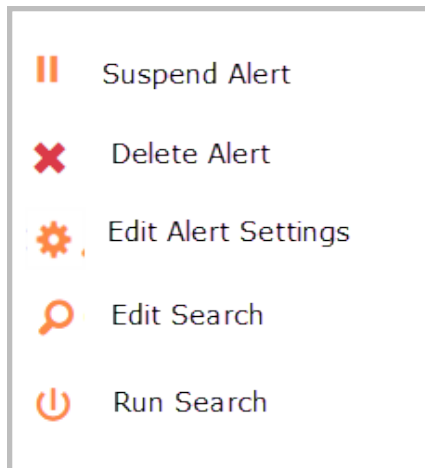
- Once saved, you will see the **Email Alerts** screen. This indicates that the Alert is saved and active
- You can **Edit**, **Suspend** or **Delete** your Alert

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



Managing a Search 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



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Alerts

Email alerts

Search Alerts Show 10 Toggle Columns

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Individual	Tax Legislation		Daily		⏸️ ❌ ⚙️ 🔍 ⏻	11/05/2021	Active
Individual	Job & Keeper		Daily		⏸️ ❌ ⚙️ 🔍 ⏻	11/05/2021	Active

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