Add an Items for Attention (IFA) FYI Alert

Print

Items for Attention (IFA) alerts notify you about new FYI IFAs related to your client accounts.

Notification Method

The notification method for IFA alerts is an e-mail summary of all alerts within the selected time interval.

Add an IFA FYI Alert

1. In the NetX360 search field, enter **alert**. Matching search results display.
2. In the **Go To** section of the search results, select **Alerts (Client Tools)**. The **Alerts** page displays.

Tip: As an alternative, click Menu > **Tools** > **Alerts**.

3. Select the **FYIs** tab. The **FYI Alerts** page displays.
4. Click **Setup FYI Alerts**. The **Change Alert Setup** page displays.
5. On the **Alert Type** tab, FYI IFA types for which you previously set up alerts are selected. Add or remove FYI IFAs as desired.
6. Click **Next** at the top or bottom of the page. The **Alert Criteria** tab displays.
7. The grid on this page lists the IFA types you selected on the previous page, as well as existing FYI IFA alerts. In the **Send Alert To** column, indicate the accounts for which you want to see alerts:
   - All accounts that I have access to.
   - Specific IBD/Off/IP # - Enter the desired firm (IBD), office and advisor (IP) numbers and click **Add**. Repeat for any additional firm/office/advisor combinations.
   - Enter specific account(s)
     - Click **Show Accounts** to display a list of available accounts. Select one or more accounts from the list and click **Add**.
       To select multiple consecutive account numbers, press **Shift+Click**. To select multiple non-consecutive account numbers, press **Ctrl+Click**.
     - Enter an account number in the **Specific Acct. #** field and click **Add**.

   To apply the same selections to all FYI IFA types, click **Copy to all**. A confirmation message displays. Click **OK**.

8. Click **Next**. The **Summary E-mail Setup** page displays.
9. Select the desired options. See Request an E-mail Summary of Alerts.
10. Click **Save and Exit**.

See Also

View Alerts
Add a Custom Alert
Add a Market Alert
Add a Status Change Alert

Add a Task Alert
Add an Action Item Alert
Request an E-mail Summary of Alerts
Edit an Alert
Edit Alert Notification Methods
Cancel Alerts
Alerts Overview
Items for Attention (IFA) User Guide

Contact Information

For additional assistance, contact your Client Service team.

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