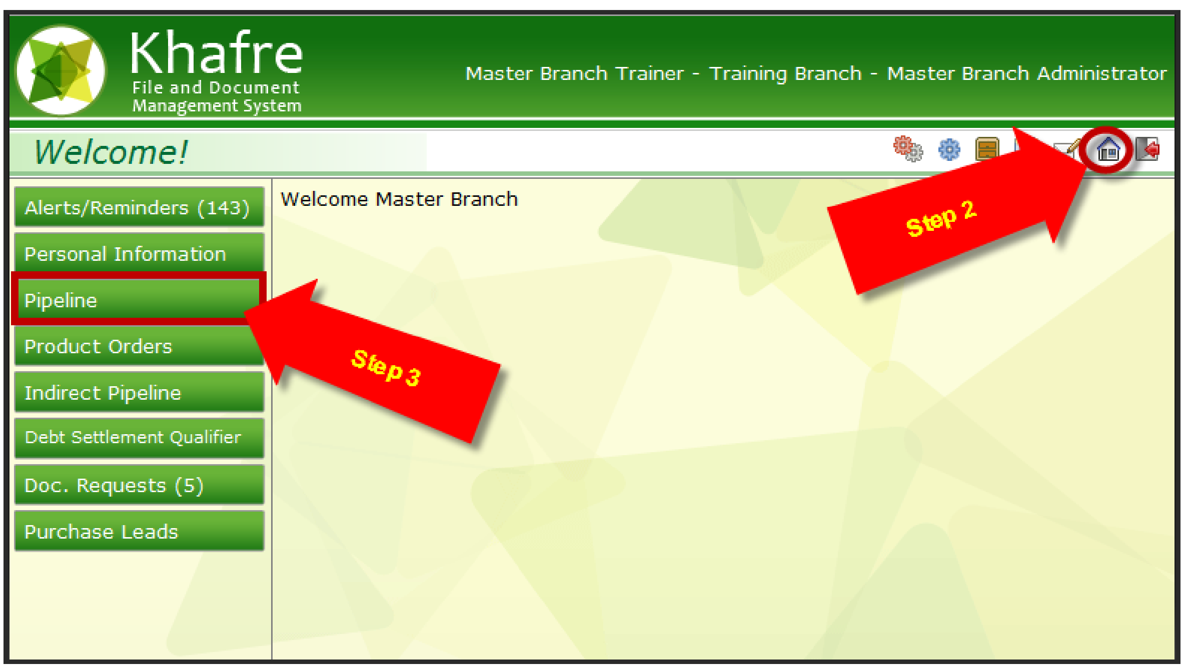
Phone (877) 745-9563
support@khafreportal.com

How To Add an Alert/Reminder to a Client File

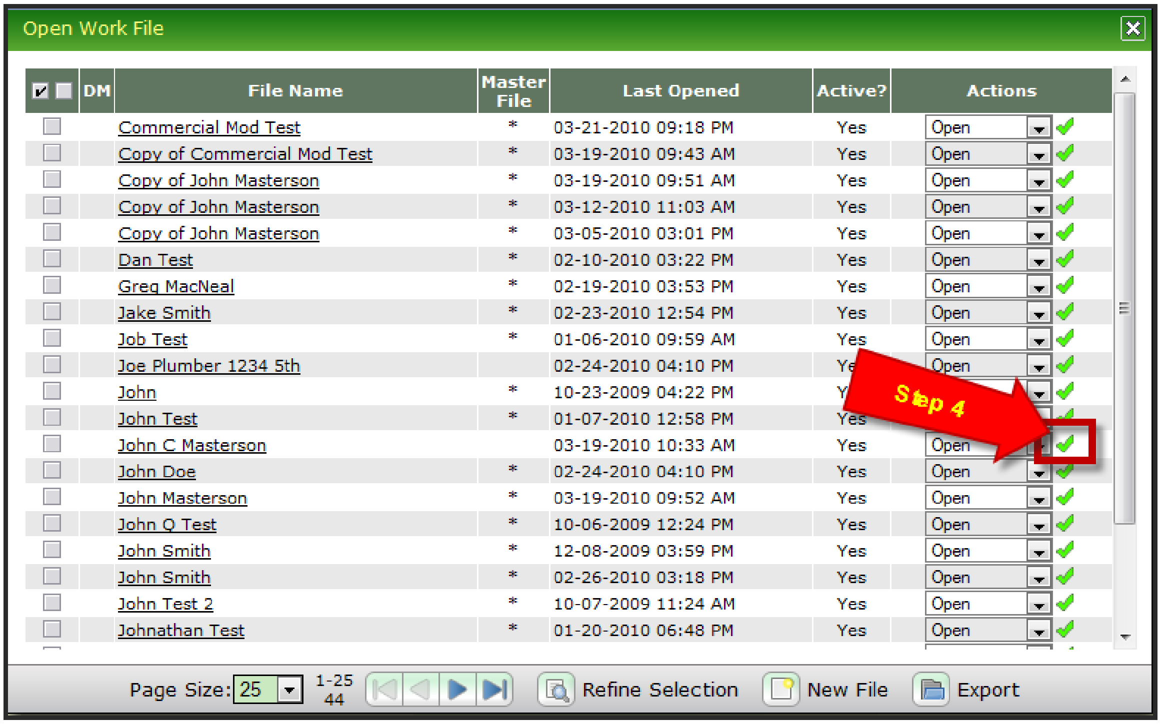
1. Log in to Khafre at http://www.khafreonline.com/app

2. Click the home icon in the upper right corner of the screen
   - The Welcome! screen displays

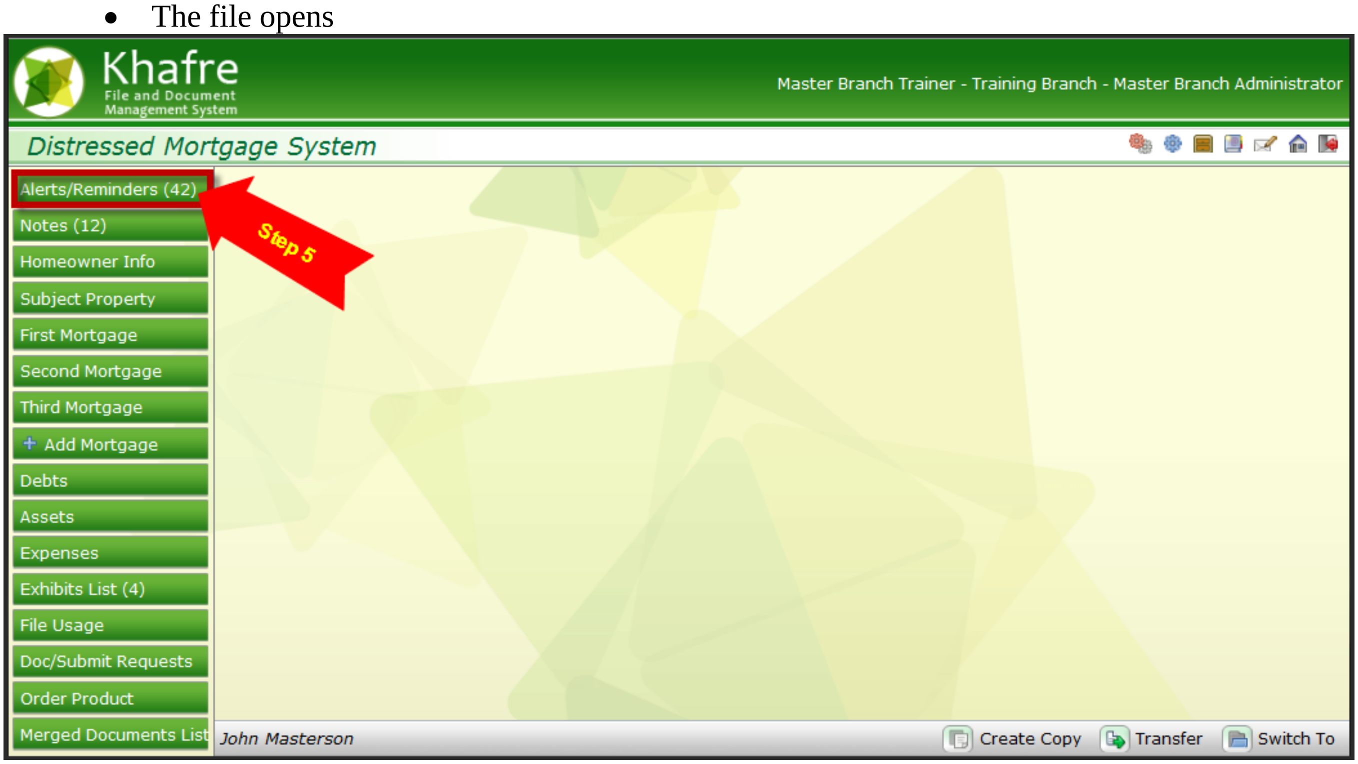


3. Click the Pipeline tab in the left-hand navigation menu

- The Open Work File dialog box displays

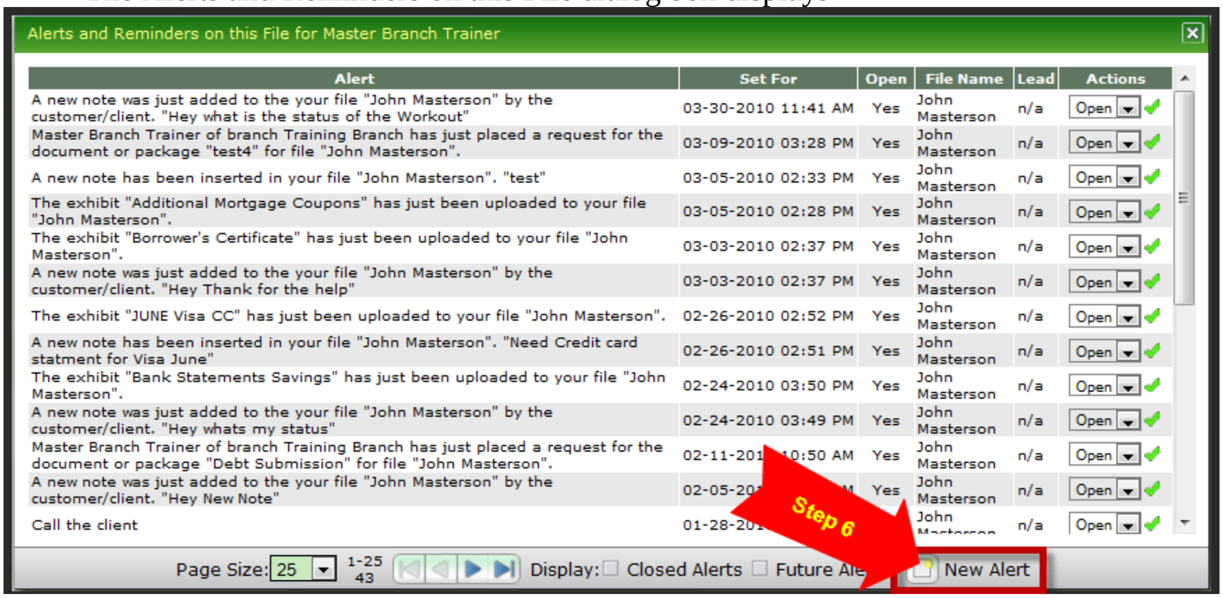


4. Click the green check to the right of the file you wish to open
   - The file opens

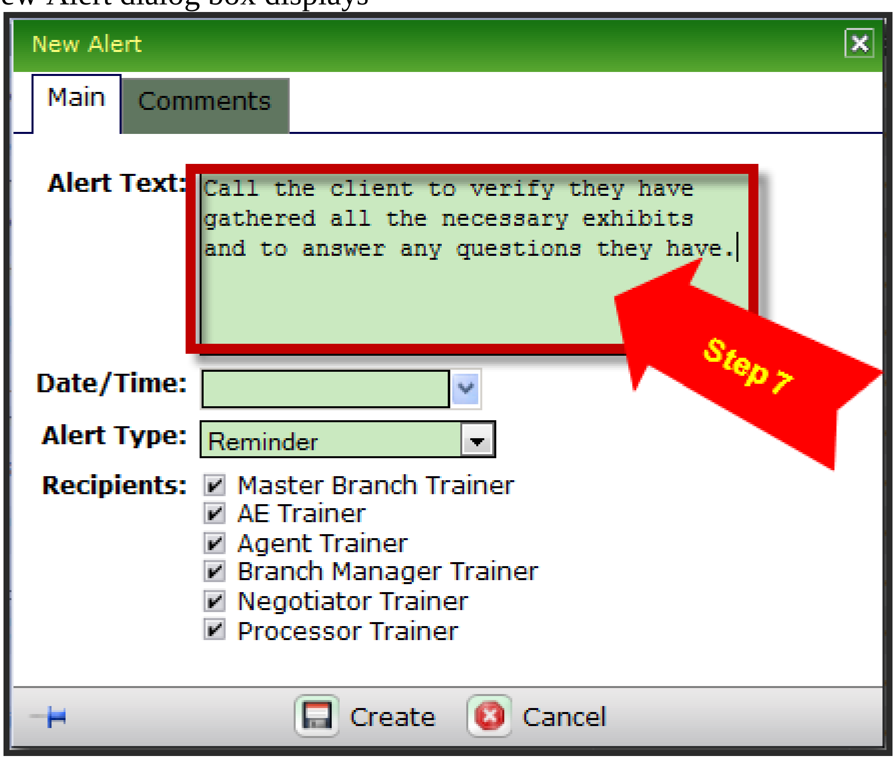


5. Click the Alerts/Reminders tab in the left hand navigation menu

- The Alerts and Reminders on this File dialog box displays



6. Click the New Alert button
   - The New Alert dialog box displays



7. Enter the text you want displayed when the alert is triggered

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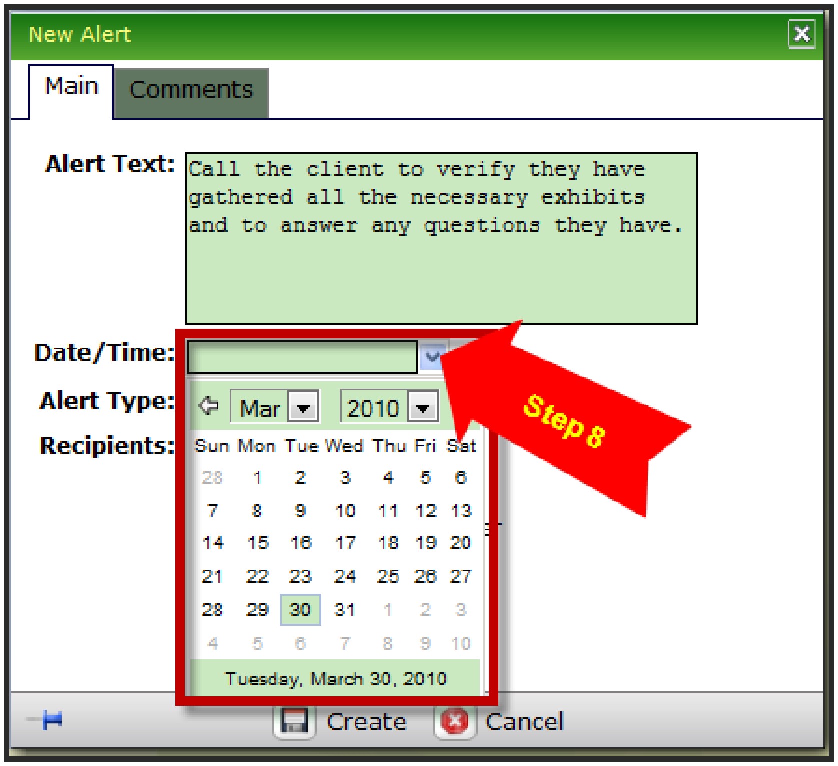
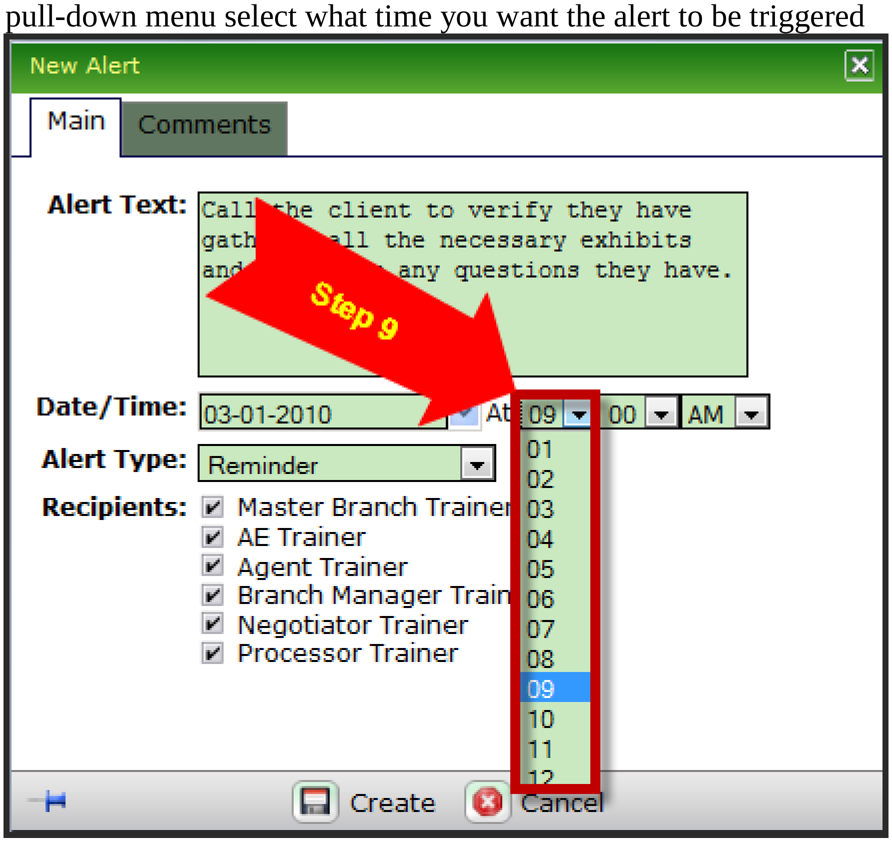
8. Using the Date/Time: pull-down calendar select the date you want the alert to be triggered



9. Using the Time pull-down menu select what time you want the alert to be triggered



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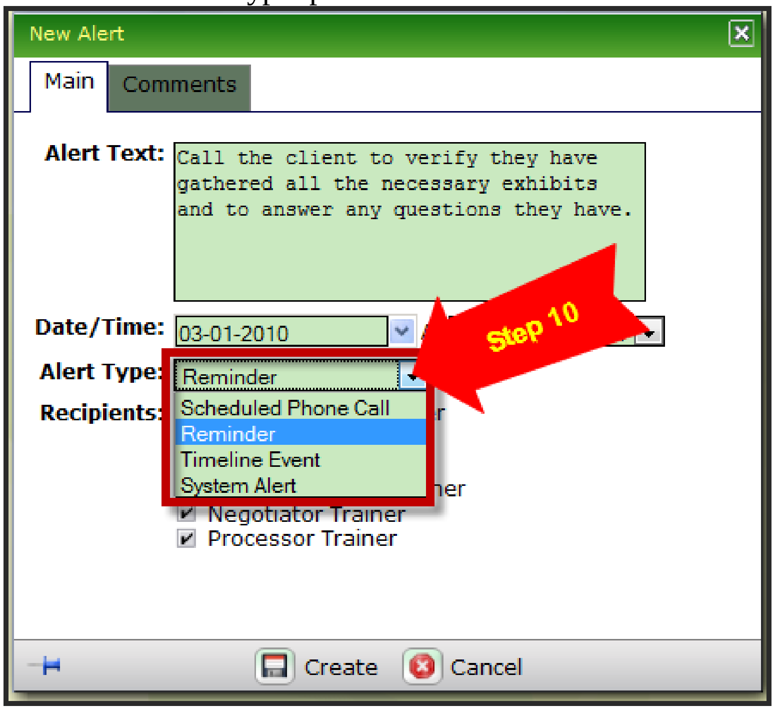
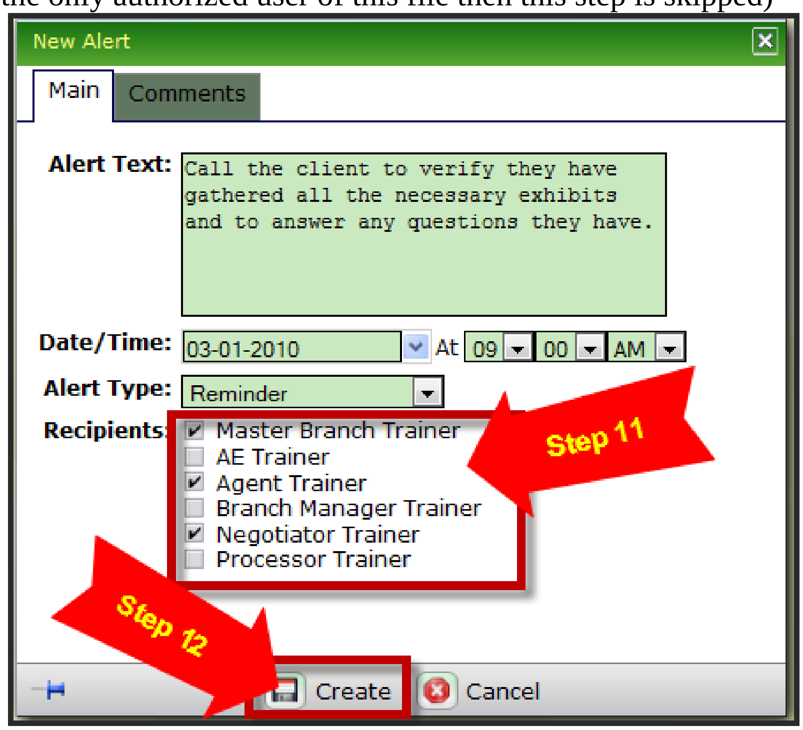
10. Select the type of alert from the Alert Type: pull-down menu



11. Select which persons should receive this alert when it is triggered by checking the appropriate boxes. (NOTE: If you are the only authorized user of this file then this step is skipped)



12. Click the Create button