

ALERTS

What is an Alert?

An Alert within NorthStar provides an additional notice or warning for a particular account. Alerts may be assigned at the Account/Occupant level or Debtor/Customer level. Additionally, Alerts may be created as a hard alert (pop-up window when the account is opened) or a soft alert located at the top of the record in pink/purple font.

Benefits of Using Alerts

- Ability to add, edit, and remove alerts as needed.
- Easily draws attention to specific items regarding accounts.
- Alerts may be raised within multiple functions of NorthStar (account level, cashiering, billing).

Step-by-Step Procedures

Note: The following Step-by-Step instructions are to add, edit, or remove an alert from an individual account.

Adding Alerts

In Account Gateway, locate the account to receive the alert.

From the Menu tab, open the Additional Information folder.

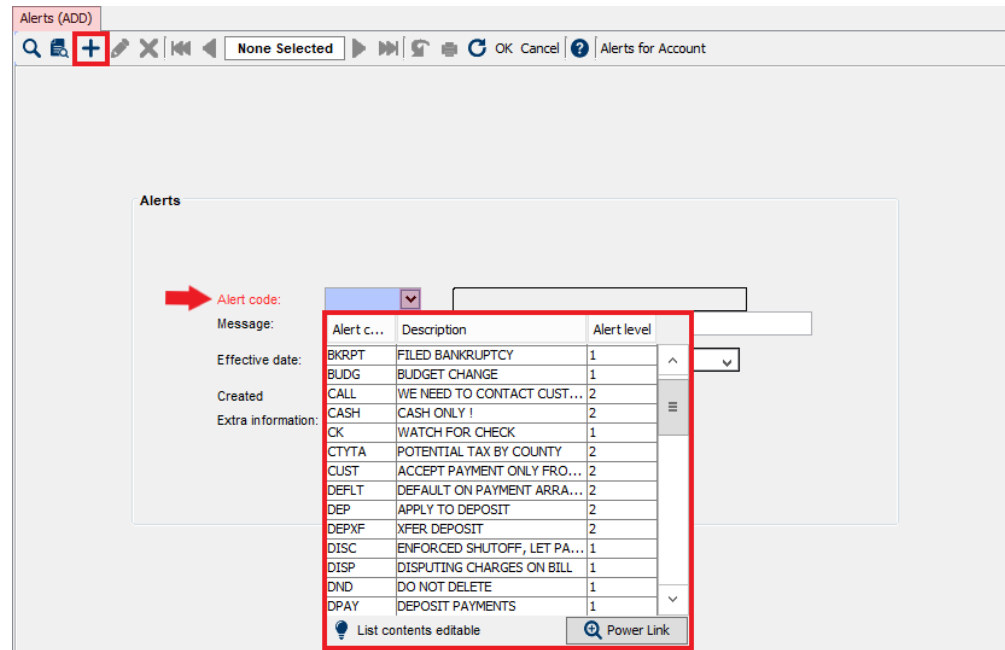
Select the **Alerts** table.

Account Gateway > Menu tab > Additional Information > Alerts

The screenshot displays the NorthStar Account Gateway interface. The top navigation bar includes 'Account Gateway', 'CARE', 'Cashiering', 'Journals', 'Reports', 'Meter Reading', 'Credit Control', 'Utilities', 'Setups', and 'Contact Management'. The main window is titled 'Waupun Default (100-21)' and shows 'Account Management View (BROWSE) ACTIVE'. The 'Alerts (BROWSE)' table is highlighted with a red box, and the 'Alerts' table is visible in the main content area. The 'Alerts' table has the following fields: Alert code, Message, Effective date, Ending date, Created, and Extra information. A red arrow points to the 'Alerts' table in the left-hand menu.

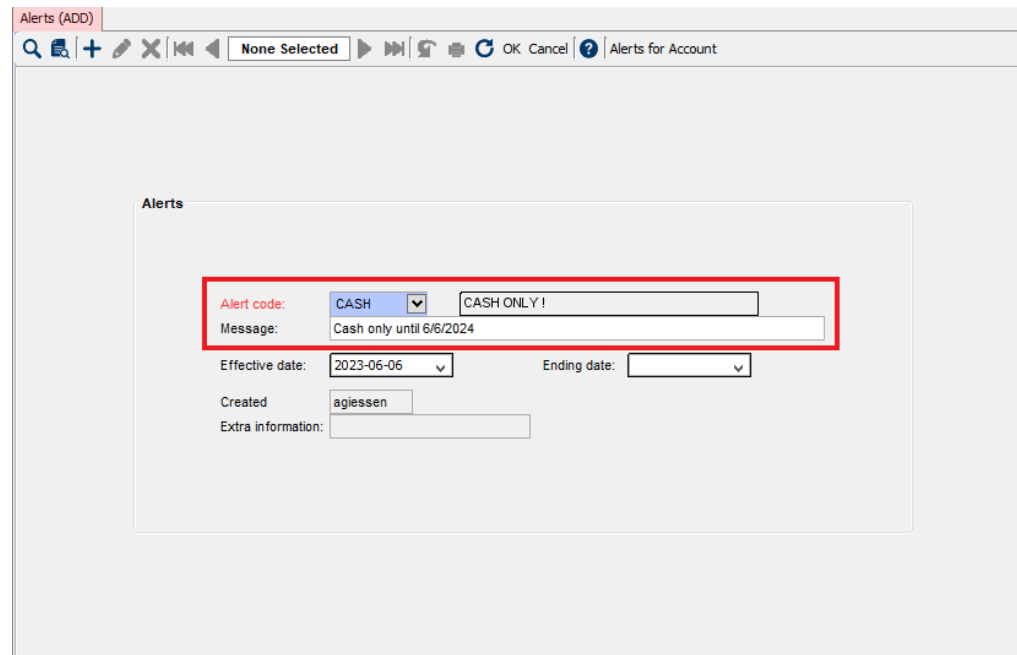
Click the **Add** icon.

At **Alert code**, select the code to from the drop-down menu.



At **Message**, enter any additional comments if desired.

An additional message is not required.



In the **Effective Date** field, enter the date the Alert is to begin. The date defaults to the current date.

NOTE: If entering the date manually, it must be in the YYYY-MM-DD format.

The **Ending Date** field does not auto-populate unless the selected alert code has a designated number of days that it should be enabled.

If no date is entered, this alert will remain in effect until it is manually deleted.

The **Created** field auto-populates with the creator's username.

Click **OK** to save.

The screenshot shows a software window titled "Alerts (BROWSE)". The window has a toolbar at the top with icons for search, add, edit, delete, and navigation, along with a page indicator "1 of 1" and buttons for "OK", "Cancel", and a help icon. The main content area is titled "Alerts" and contains the following fields:

- Alert code:** A dropdown menu set to "CASH" and a text field containing "CASH ONLY!".
- Message:** An empty text field.
- Effective date:** A date picker set to "2023-06-06".
- Ending date:** A date picker set to "2024-06-06".
- Created:** A text field containing the username "agiessen".
- Extra information:** An empty text field.

A red rectangular box highlights the "Effective date" and "Ending date" fields.

Click the **Refresh** icon.

A pop-up Alert window appears with the warning which includes the date the alert was assigned to the account.

Click **Close** to exit the Alert message screen.

The screenshot shows the 'Account Management View (BROWSE)' interface. At the top, it indicates 'ACTIVE CASH'. The main area is divided into 'Account Info' and 'Service Address' sections. A 'Quick Info' bar shows '1 of 850' records. A 'Refresh' icon (a circular arrow) is highlighted with a red box. Below the main form, a 'Service Summary (BROWSE)' table is visible. An 'Alert' window is overlaid on the table, containing a warning message: 'Warning' followed by 'DEFAULT ON PAYMENT ARRANGEMENT : 2023-05-16' and 'CASH ONLY ! : 2023-06-06'. The alert window has a 'Close' button at the bottom right, which is highlighted with a red arrow.

Name	Balance	Last Read	Last Billed	Amount
ELECTRIC	0			0.00
SEWER	0			0.00
WATER	0			0.00
STORMWTR	0			0.00
RECYCL	0			0.00

Totals: Balance: 0.00 Deposit: 0.00 Dep Req'd: 0.00 Amount: 0.00

Editing Alerts – Changes to Message, Effective Date, Ending Date

In Account Gateway, look up the account requiring the edit to the alert message.

From the Menu tab, open the Additional Information folder.

Select the **Alerts** table.

Account Gateway > Menu tab > Additional Information > Alert

The screenshot displays the Account Gateway software interface. The top navigation bar includes tabs for Account Gateway, CARE, Cashiering, Journals, Reports, Meter Reading, Credit Control, Utilities, Setups, and Contact Management. The main window is titled "Waupun Default (100-21)" and shows "Account Management View (BROWSE) ACTIVE CASH".

The left sidebar contains a "Menu" tab and a "Favorites" section. Under "Standard", the "Additional Information" folder is expanded, and the "Alerts" table is selected, indicated by a red arrow.

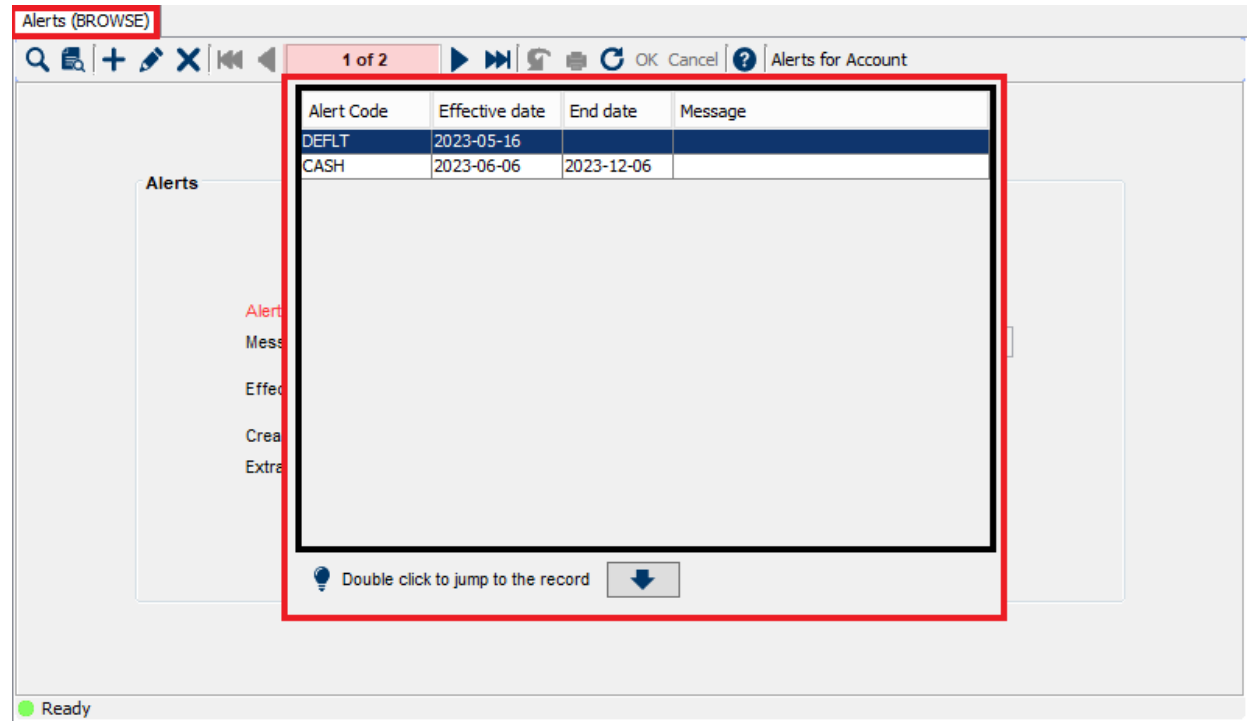
The main content area shows the "Alerts" table with the following details:

- Alert code: DEFLT (dropdown menu)
- Message: DEFAULT ON PAYMENT ARRANGEMENT
- Effective date: 2023-05-16 (dropdown menu)
- Ending date: (empty dropdown menu)
- Created: agiessen
- Extra information: (empty text field)

A status bar at the bottom of the Alerts table reads "Please select alert code...".

Note: If multiple alerts exist on the account, use the **Browse** box to view and locate the specific alert that needs modifying.

Double click the Alert to edit.



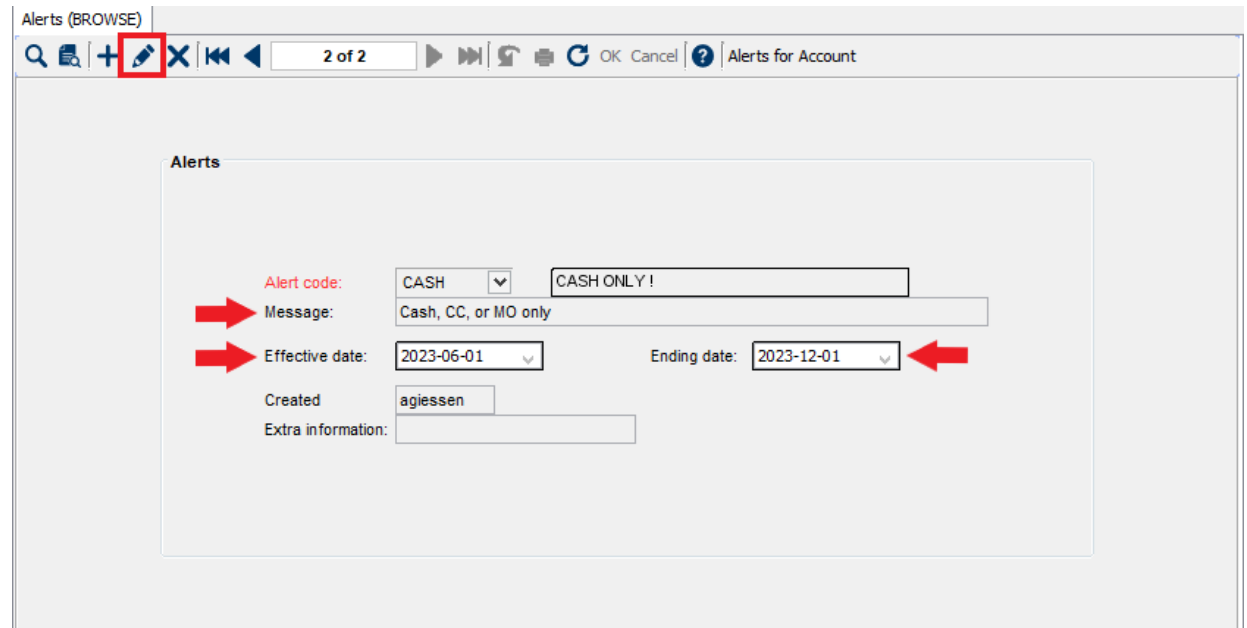
Click the **Edit** icon.

Tab or mouse to the field to make changes.

*NOTE: If changing the **Ending date**, the alert will be active until midnight of the date selected.*

Use the previous day's date to end the Alert immediately.

Click **OK** to save.



Removing Alerts

In Account Gateway, look up the account requiring the edit to the alert message.

From the Menu tab, open the Additional Information folder.

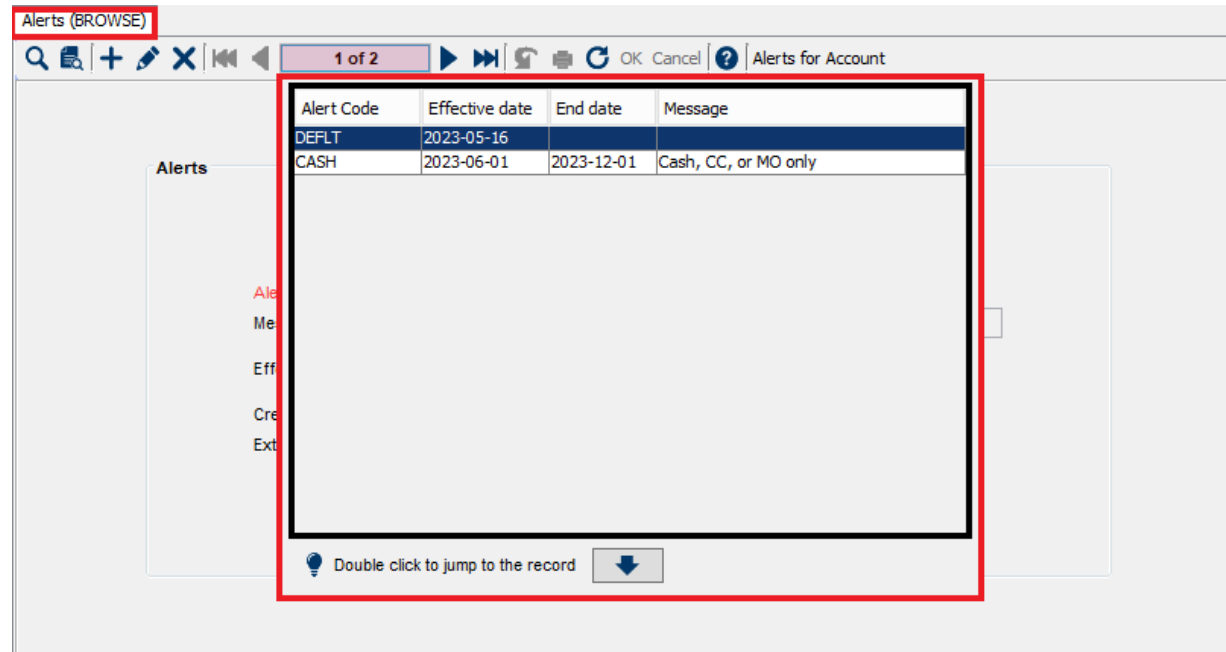
Select the **Alerts** table.

Close the pop-up Alerts window if one is active.

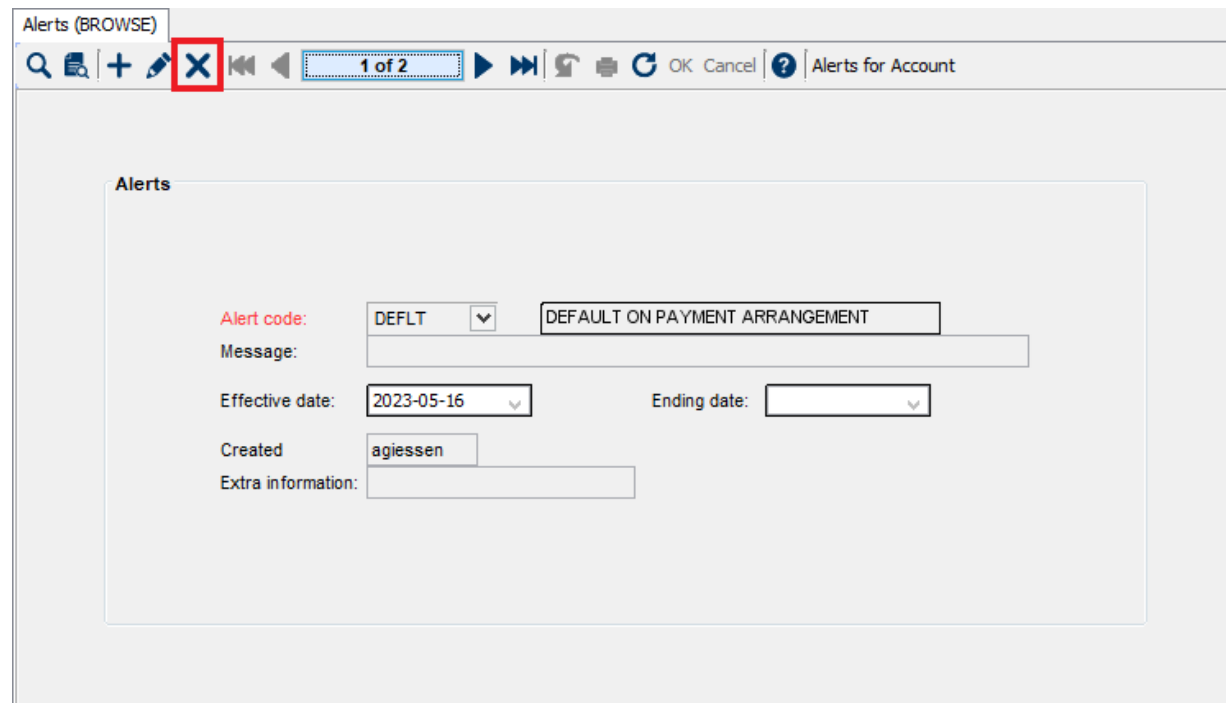
The screenshot displays the Account Gateway interface for account 'Waupun Default (100-21)'. The main window is titled 'Account Management View (BROWSE) ACTIVE CASH' and shows account details such as 'Account: 100 21', 'Name: Mickey Mouse', and 'Customer: 1793'. A 'Service Address' section is also visible with fields for House #, Region, City, State, and Zip. Below the account details, the 'Alerts (BROWSE)' window is active, showing a list of alerts. A red arrow points to the 'Alert' entry in the left-hand navigation menu. A pop-up window titled 'Alert' is displayed in the foreground, showing a warning message: 'Warning: DEFAULT ON PAYMENT ARRANGEMENT : 2023-05-16' and 'CASH ONLY ! - Cash, CC, or MO only : 2023-06-01'. A red arrow points to the 'Close' button in the pop-up window.

Use the **Browse** box to view the current alerts on the account.

Double click the Alert that should be removed. The selected alert is displayed on the table.

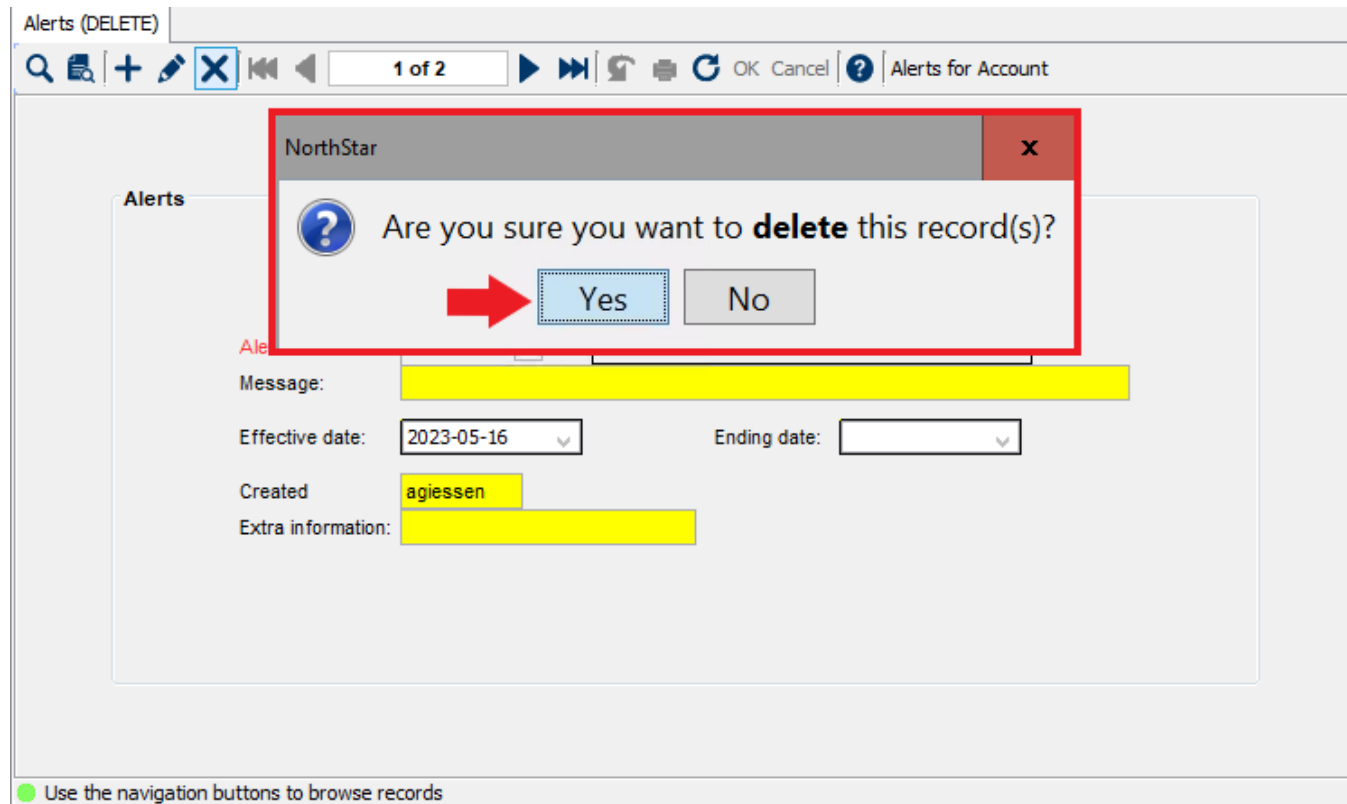


Click the **Delete** icon on Alert tool bar.



A pop-up window appears prompting verification of the selected action.

Click **Yes** to continue with the alert removal.



Click the **Refresh** icon at the top of the record.

Confirm the Alert was deleted.

The screenshot displays a software interface for account management. At the top, a navigation bar includes icons for Account Gateway, CARE, Cashiering, Journals, Reports, Meter Reading, Credit Control, Utilities, Setups, and Contact Management. The main window is titled 'Waupun Default (100-21)' and shows 'Account Management View (BROWSE) ACTIVE CASH'. A toolbar at the top of the main window contains various icons, with a refresh icon (a circular arrow) highlighted by a red box. Below the toolbar, there are sections for 'Account Info' and 'Service Address'. The 'Account Info' section includes fields for Account (100, 21), Name (Mickey Mouse), and Customer (1793). The 'Service Address' section includes fields for House # (100), Street (MADISON ST), City (ANYTOWN), and Zip (53123). A 'Favorites' sidebar on the left lists various menu items, with 'Alert' highlighted by a red arrow. Below the main window, there is a 'Service Summary (BROWSE) Alerts (BROWSE)' section. This section displays a table of alerts with the following details: Alert code: CASH (dropdown), Message: CASH ONLY!, Effective date: 2023-06-01 (dropdown), Ending date: 2023-12-01 (dropdown), Created: agiessen, and Extra information: (empty field). The status 'Ready' is shown at the bottom of the interface.