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News & Updates Overview

The News & Updates feature allows you to post information related to plans, events, or business units. Some configurations may also provide content from RSS feeds or other mediums.

News & Updates

Filter

Add



Title ↑	Date	Actions
News 1	09/24/2018 11:25:00 AM	 
News 2	09/24/2018 03:29:00 PM	 

Page size

10 ▼

<< < Page 1 of 1 > >>

Displaying 1 - 2 of 2

Add News & Updates

1. To add a news or update record, click News in the navigation bar, then click Add.
2. Enter a name for the record in the Title field.

News & Updates

General

Title:

Folder:

News

 [Choose Folder](#)

Additional Information +

Add & Exit

Add & Continue

Cancel

3. If required, select an alternate folder for the record.
4. Complete any custom fields in the Additional Information section.
5. Click Add & Continue to save your changes and view additional options.

View, Filter & Sort News & Updates

To view an existing News & Updates record, click the News icon in the navigation bar, then click the  icon in the Actions column. To edit the record, click the  icon.

News & Updates

Filter

Add



Title ↑	Date	Actions
News 1	09/24/2018 11:25:00 AM	 
News 2	09/24/2018 03:29:00 PM	 
News 3	09/24/2018 03:55:00 PM	 

Page size

10 ▾

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1

 of 1 > >>

Displaying 1 - 3 of 3

To filter the records by folder, click Filter, then select a folder.

To sort the records, click the column headers.

Filter By Folder



 New Org

 ☒ News

Filter

News & Updates Files

1. To upload a file to a news/update record, click News in the navigation bar, then open the record.
2. Click the Files tab.

News & Updates

General **Files** Categories Properties

Browse for a File to Upload:

Choose File

No file chosen

Upload

No Files have been Uploaded

3. Click Choose File, locate the file you want to upload, then click Open.
4. Click Upload.

News & Updates

General **Files** Categories Properties

File: Document.docx successfully attached

Browse for a File to Upload:

Choose File

No file chosen

Upload

File Name	Type	Actions
Document.docx	application	  

News & Updates Categories

The Categories tab allows you to index the News & Update record with categories and additional searching capabilities.

1. To select a category for a document, click News in the navigation bar, then open the record.
2. Click the Categories tab.
3. Click a category to select it and add it to the Current Categories section. The available categories are configured in the [Referential Data](#) settings.

News & Updates

[General](#) [Files](#) **Categories** [Properties](#)

Available Categories

 General

 Miscellaneous

 Test

 Weather

Browse

Filter - Results

Filter

Reset

Current Categories

 Miscellaneous

News & Updates Properties

The Properties tab of a record allows you to select an account or role as an owner of the record, review system information, schedule reviews, view existing schedules, pending reviews, and the record's history.

Contacts

General Contact-Methods Account Photo Relationships Shares Forms Locations **Properties**

Ownership

Owner: No Owner Specified

[Choose Owner](#)

Added By: 

Added Date: 09/17/2018 05:13:08 PM

Last Updated By: 

Last Updated Date: 09/17/2018 05:13:08 PM

Reviews

New Schedule: Title:

Type:

Trigger: ☒ Schedule ☐ Dependent

Due Every:

Start Date: [Set to Now](#)

AT: :

Assigned To: 

[Set Assignment](#)

☐ Automatically Notify Assignee When Assigned?

