

## TIPS & TRICKS

October 2015

*“One of the best things I like is having the daily report. It helps me to keep up with the activity on our account on a daily basis. I don’t have to wait until the end of the month to resolve any issues which may need some attention, such as an outstanding check or deposit. Thank you to everyone at iTracs for making things so much easier.”*

—Sherry S. O’Neill  
N.C. Certified Paralegal  
Stephen C. Holton, Attorney at Law

### User-Defined Alerts

**User-Defined Alerts** enable you to monitor specific types of transactions which have been outstanding for a pre-determined amount of time. When transactions in your account meet the criteria defined in alerts, they appear on your Morning Report. iTracs is delivered pre-packaged with a standard set of alerts we have defined for all of our clients. However, you may find that you desire additional alerts.

### Potential User-Defined Alert Criteria

- Disbursements made to specific lenders
- Disbursements made to a specific individual
- Disbursements made for certain services such home inspections or surveys
- Realtor commission checks
- Credit card payoffs

### How Do I Add a New Alert?

- Select **Alert Criteria** on the left side of the RynohTrax menu
- Click **ADD** to add a new alert
- From the first drop down box, select the desired criteria for which to base the alert: Payee, Purpose, or Amount
- Fill in the fields with the desired parameters
- Check the box next to **Only managers can edit/delete this alert** if you would like to restrict the ability to edit to those with management privileges
- Select the accounts to which the alert applies
- Click **SAVE** when done

For more resources visit [www.invtittle.com/itracs](http://www.invtittle.com/itracs).