

# Ctrl Alerts



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Instruction for using the Alert Dashboard

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# 1 Using the Alert Dashboard

The Alert Dashboard is the central location in the ctrl portal where intermediary users will receive notifications (Alerts) in response to various activities on the ctrl portal. The Alert Dashboard will pop up immediately when the user logs into ctrl.

## 1.1 Interaction on the Alert Dashboard

### 1.1.1 Open Alert

As is customary with the most common applications, an Alert can also be opened by using the left mouse button to click the description of an Alert.

### 1.1.2 Toolbar

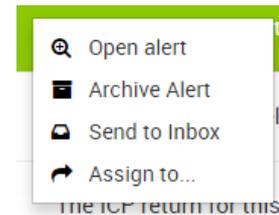
Several options are available once an Alert has been opened. These options are shown in the toolbar.



### 1.1.3 Right mouse button

The options shown in the toolbar are also always available through the right mouse button in the overview screen.

Depending on the Alerts selected, the options available may differ.



### 1.1.4 Collective Alert

When five or more of the same Alerts are available in the same month, they will be grouped and shown as follows:

You will be able to see the individual, underlying Alerts and the related companies by clicking the collective Alert.

**(9)Messages**

## 2 Filtering & Searching

### 2.1 Filtering

The Alert Dashboard has a number of filter options. If you click a filter it becomes green. If you click this active filter once again it becomes inactive. If all filters are inactive (grey), all Alerts are shown. This is also the default position of the Alert Dashboard after an intermediary user has logged into the ctrl portal.



### 2.2 Searching

In addition to the various filter functions it is possible to search for specific Alerts through the Search window. The Search window can be combined with the filters available.



#### Find an alert

The Search window can be used for a full text search according to a description of an Alert but also according to a customer's name and assignment manager.

Through the dashboard icon  at the top right of the screen the intermediary user can return to the original default position of the Alert Dashboard (without filters). In addition, it is also possible to delete the search entry manually and change active/inactive filters, if necessary.

## 3 SBR

SBR, or "Standard Business Reporting", is the national standard for the digital exchange of all business reports. SBR is the standard used to send all documents offered to the ctrl portal (such as tax returns, annual accounts for publication purposes and credit revisions) to the government institutions and/or banks involved.

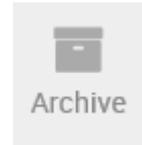
When the intermediary user activates the SBR button, this will show all SBR documents ready to be approved/sent by the customer. Each intermediary user may thus monitor whether the customer has already forwarded the documents to institutions like the Chamber of Commerce or the Tax Administration.

A limited group of intermediary users can also file these documents on behalf of the customer. Should you need information on the approval of SBR documents, please consult the separate manual through "Help & Contact".

# 4 Archive

## 4.1 General

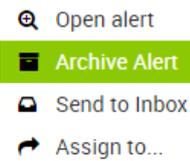
Once Alerts have been performed they need to be archived. All archived Alerts can be viewed by clicking the Archive icon.



## 4.2 Archive Alert

Alerts can be added to the archive in three ways:

- Automatically: after, e.g., an SBR Alert has been dealt with
- Manually: through the right mouse button (see the box next to this)



- Manually: through the toolbar buttons



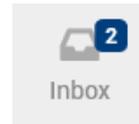
If an Alert is added to the archive, a log is created about who has archived this specific Alert. The name of this colleague will subsequently be stated in the Alert line.

Description	Archived by
The ICP return for this company could not be delivered to the Belastingdienst. Check the details.	M. van Eeten

# 5 Inbox

## 5.1 General

The inbox is the location where all intermediary users can find Alerts assigned to him or her.



## 5.2 Assign to...

Individual Alerts can be assigned to colleagues by clicking an Alert with the right mouse button and then opting for "Assign to..."

- 🔍 Open alert
- 📁 Archive Alert
- 📧 Send to Inbox
- ➡️ Assign to...

**➡️ Send alert** [x]

Receiver

Subject

Message

**Send**

A new window is opened in which a colleague can be chosen, after which a "Subject" and "Message" should be filled in as additional information for this colleague.

After the Alert has been sent, the name of the colleague will be stated in the Alert and it will be shown in the Inbox of this colleague.

Note: This administration has GL accounts that are not linked to the schema. Financial alerts will not be generated.  
*Claudia Licher*

## 5.3 Send to inbox

Individual Alerts can be added to one's own ctrl inbox by clicking an Alert with the right mouse button and then choosing for "Send to Inbox".

The Alert is added to your inbox.

Now, the name of the colleague to whose personal ctrl inbox the Alert has been sent, that is you, will be shown just under the Alert title.

To remove the Alert, click the Alert with the right mouse button to open the menu and select "Remove from Inbox".

Alerts in your inbox cannot be assigned to anyone else by your colleagues.

- 🔍 Open alert
- 📁 Archive Alert
- 📧 Send to Inbox
- ➡️ Assign to...

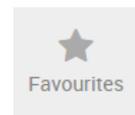
- 🔍 Open alert
- 📁 Archive Alert
- 🗑️ Remove from Inbox
- ➡️ Assign to...

- Rob H [x] 🔍 Open alert
- BMM [x] 📁 Archive Alert

# 6 Favourites

## 6.1 General

In addition to the filter options described earlier, it is possible to create a Favourites filter. Activating the Favourites filter will only show all Alerts of clients designated as favourites.



## 6.2 Management

The Favourites can be managed in  "Management". Management can be activated by clicking the "sprocket". This is where the user has the possibility to add and delete favourite ctrl links. Of course the intermediary user will only be able to choose from clients in respect of which the user involved has been assigned rights.