jack henry™

FactorSoft™

• Release v4.7

Lien Monitoring

Limitations on Maintenance Services

The FactorSoft™ application is intended for use in accordance with the standards and processes described within this documentation. Efforts to investigate and/or repair FactorSoft™ application or data integrity issues caused by activities or integrations outside of the intended use of the FactorSoft™ platform will be subject to the then-current Jack Henry Professional Services billable hourly rate.

Standard Maintenance Services (Technical Support) does not include the following:

Investigation and Remediation of errors and data integrity issues caused, contributed to, or by any of the following:

- a software program that was not originally provided by Jack Henry

  - third-party automation, BOT/Screen Scraping technology, custom importers, or any other integration with FactorSoft™ that was not created by or in conjunction with Jack Henry.

- any modification not provided by Jack Henry to the software or standard database schema

  - the addition of custom database elements including triggers, stored procedures, tables, and columns

  - the alteration of standard FactorSoft™ triggers, tables, columns, stored procedures and indexes

  - the execution of T-SQL scripts resulting in changes to the data stored within the FactorSoft™ database

- equipment, software, networks or any other infrastructure in the customer's environment that does not meet the minimum requirements described within the then-current FactorSoft™ product documentation

Please note that if you are exploring possibilities with third-party software providers or considering altering the FactorSoft database in any way, it is strongly recommended that you discuss your plans with the FactorSoft™ support team before making any commitments or changes. As your software partner, we may be able to help solve your business problem in a way that does not introduce risk, data corruption, or system instability.

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Lien Monitoring

FactorSoft has implemented account monitoring in a partnership with First Corporate Solutions (FCS), allowing users of FactorSoft to monitor clients and debtors for Federal or State government tax liens and expedite and automate notifications of liens.

First Corporate Solutions monitors client and debtor names to ensure you are notified about any other filings made against the same client or debtor name. The sooner you discover a UCC, state tax lien, federal tax lien or abstract of judgment, the faster you can take action to protect your security interest.

Why monitor?

As a lender, you need to know if the Federal or State government has filed a tax lien against an existing or potential account. With Account Monitoring by First Corporate Solutions, you can quickly identify the breaking of negative covenants, fraudulent terminations, and amendments while mitigating your risk from tax authorities and judgment creditors.

Using Lien Monitoring functions in FactorSoft, you will:

- Simplify the setup and termination of Account Monitoring targets by integrating them into the FactorSoft user interface.

- Automate the connection of incoming alerts with the appropriate clients, customers, and debtors.

- Reduce financial risk by automatically flagging clients, customers, and debtors with outstanding alerts and preventing purchases against those parties, if you so desire.

- Maximize notification time by displaying alerts within FactorSoft. Shorten notification time and speed up your reactions by monitoring alerts displayed within the FactorSoft interface

For information on First Corporate Solutions Account Monitoring Services, call 877-230-8933 or email info@ficoso.com to start reducing risk via integration with FactorSoft.

How it Works

Using Lien Monitoring:

- The FactorSoft user creates new requests for monitoring of a "target" client, debtor, or an individual associated with the client or debtor (owner, partner, etc.)

- The request is transmitted to First Corporate Solutions for monitoring via the Engine. The Engine will send new target requests repeatedly with each scheduled process until the start date is returned from the vendor.

- First Corporate Solutions searches and monitors Federal, State, and county records for liens.

- If a lien is discovered, an alert is generated and retrieved into FactorSoft via the Engine as an Open Alert.

- When a Client or Debtor has an open alert, this causes a no-buy condition on the account, and FactorSoft can be configured to prevent purchase update or warn prior to update for these accounts based on System Preference.

- Once the alert has been appropriately handled, it is marked as "handled" by the user to move it from the Open Alert queue to a Handled Alert list.

Setting Up Lien Monitoring

This section shows you how to set up Integrated Account Monitoring in FactorSoft. The setup requirements are:

- Activation

- Set Security Roles

- Set System Preferences

- Set User Preferences

Activation

To use the Lien Monitoring functions in FactorSoft, you must obtain a user account with First Corporate Solutions. The First Corporate user credentials are used in the set up of FactorSoft. For more information, contact First Corporate Solutions at call 877-230-8933 or email info@ficoso.com.

Security Roles

Set the Security Roles under **Administrative Functions**, **Monitoring** and under **Alerts**, **Handling** and **Monitoring** to set access, update levels, and functional access for users. There are two roles that can be set to limit access to theLien Monitoring features. These are described below:
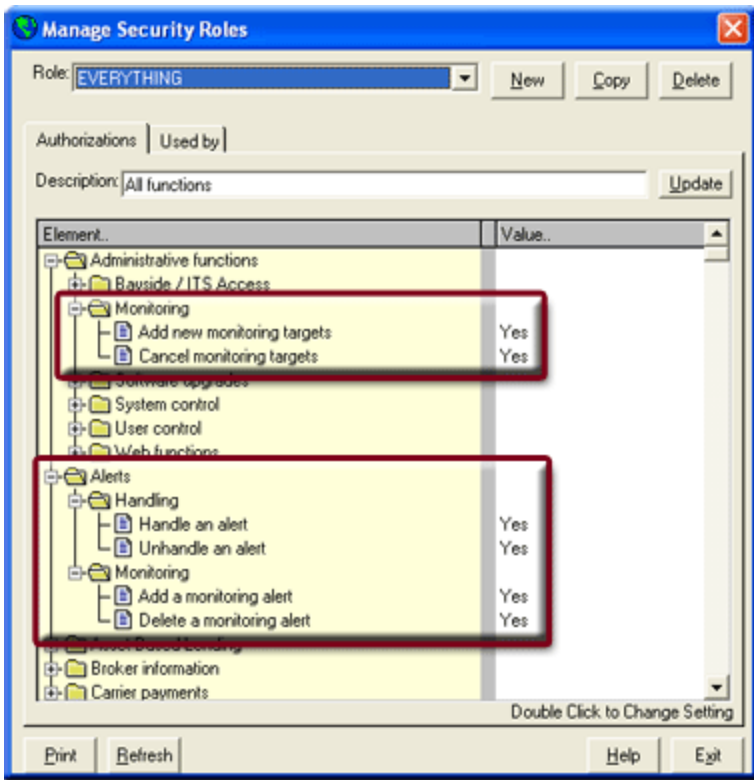
Role	Description
Monitoring	
Add new monitoring targets	Enables users with this role to create a new client or debtor monitoring target on the Monitor Requests screen.
Cancel monitoring targets	Enables users with this role to cancel an existing client or debtor monitoring target on the Monitor Requests screen.
Alerts	
Handle an Alert	Set to **Yes** to enable the Flag as Handled button on the Open Alerts tab of the Monitor Request screens. If set to **No**, this button does not appear and the user does not have access to this function.
Unhandle an Alert	Set to **Yes** to enable the Flag as Unhandled button on the Handled Alerts tab of the Monitor Requests screen. If set to **No**, this button does not appear and the user does not have access to this function.
Add a monitoring target	Set to **Yes** to enable the **New** button on the Requests tab of the Monitor Requests screen, which allows the user to create a new request. If set to **No**, this button does not appear and the user does not have access to this function.

Role	Description
Delete a monitoring target	Set to **Yes** to enable the Cancel button on the Requests tab of the Monitor Requests screen, which allows the user to cancel an active monitoring request. If set to **No**, this button does not appear and the user does not have access to this function.

The following Security Role under **Alerts**; **Handling** determines the user's level of access and update rights for the alert snooze feature:

Role	Description
Snooze an alert	Set to **Yes** to allow users with this role to snooze alerts on the Requests tab of Monitor Requests screen.
Unsnooze an alert	Set to **Yes** to allow users with this role to unsnooze alerts on the Snoozed Alerts tab of the Monitor Requests screen.

System Preferences

Set the following options in **Identification/System Constants**, **Interface Parameters**, **Monitoring** folder.

Preference	Description
Allow client monitoring	Set to **True** to enable the Account Monitoring button on the Liens/monitoring panel of the Client Information screen. This button is used to access the Monitor Requests screen for the selected client.
Allow debtor monitoring	Set to **True** to enable the Account Monitoring button on the Address panel of the Debtor Information screen. This button is used to access the Monitor Requests screen for the selected debtor.
Email accounts to receive out-of-sync target alerts	Enter the ProfitStars®, First Corporate, and lender email addresses to receive the "out of sync" email that occurs when there is a discrepancy in the number of monitoring targets between First Corporate and FactorSoft.
Folder location to store monitoring log files	If a valid folder location is entered in this preference, FactorSoft produces a log file containing the transmission details between First Corporate and FactorSoft. This is a ProfitStars® troubleshooting feature, and should not be populated for normal operations.
First corporate monitoring username	Enter the username with which you log into the monitoring interface, supplied to you by First Corporate Solutions. This username, along with the password, is passed to the monitoring interface by FactorSoft to permit integrated mon-

Preference	Description
	itoring.
First corporate monitoring password	Enter the password, supplied by First Corporate Solutions, used to log into the monitoring interface.
First Corporate monitoring web services URL	Enter the Web Services URL provided by FSC required for Authorization
First Corporate monitoring API URL	Enter the API URL provided by FSC required for Authorization.
First Corporate Client ID	Enter the Client User ID
First Corporate monitoring Client Secret	Enter the Client Secret

Set the following options in the **Data entry behavior**, **General** and **Purchase update** folders. These system preferences determine how FactorSoft will handle an attempt to purchase on the Purchase/Schedule Batch screen when a client or debtor has open alerts in the Alerts queue:

Preference	Description
General	
Do not allow input if there are open alerts	Select the action that FactorSoft is to take if the client has an open alert when the user attempts to update a purchase: • **No**: allow the update without interruption. • **Yes**: prevent update.
Purchase update	
Action if a debtor has an open alert	Select the action that FactorSoft is to take if the debtor has an open alert when the user attempts to update a purchase: • Nothing: allow the update without interruption. • Warning: display a warning message before allowing the update. • Do not allow update: prevent update.
Action if a debtor is no-buy	Select the action that FactorSoft is to take if the debtor is flagged with a no-buy reason when the user attempts to update a purchase:

Preference	Description
	• Nothing: allow the update without interruption.
	• Warning: display a warning message before allowing the update.
	• Do not allow update: prevent update.

If either or both of these options is set to **Warning**, FactorSoft displays a warning message when attempting to access the Purchase/Schedule Batch screen.

> **NOTE**
> In addition, FactorSoft's automatic approval logic honors these system preference settings and prevents automatic approval of invoices affected by the system preferences.

To enable limiting reserve release with an open alert, set the following System Preference in the **Client rules/defaults**, **Ineligibility/summary calculation**, **Release tab**, folder:
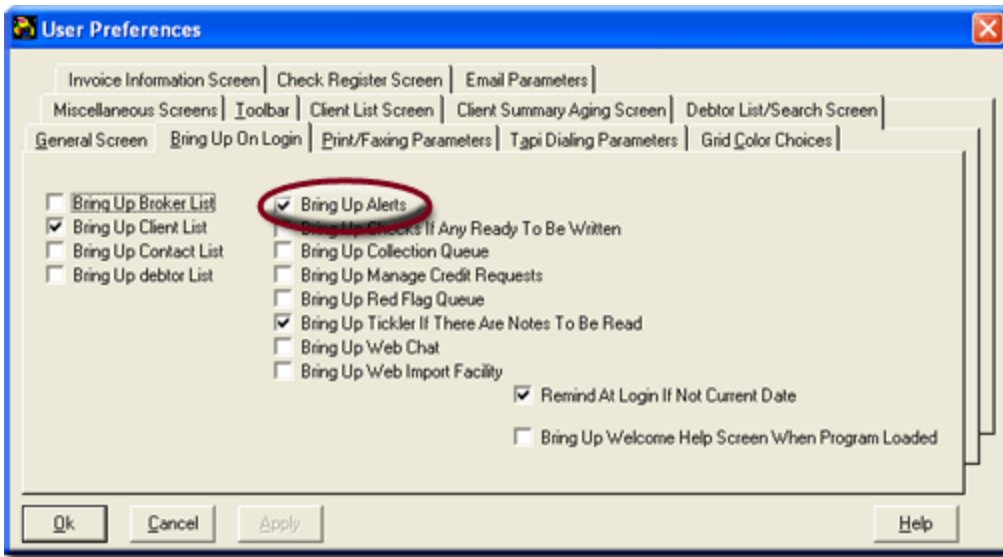
Preference	Description
Do not allow reserve release if there is an open alert	Set to **True** to prevent reserve release on any client that has an open alert returned from the monitoring vendor.

To enable the alert Snooze function, set the following System Preferences in **Fields/screen behavior**, **Screens**, **Monitor** alerts:

Preference	Description
Allow alert snoozing	Set to **True** to enable the alert snooze function.
Default snooze time in hours (default is 24)	Set the default number of hours to suspend the affect of the alert.

Set User Preferences

An option on the User Preference screen allows you to display the Monitor Alerts screen at login to FactorSoft. Access User Preferences from the System menu in cad and select the Bring Up on Login tab, as shown below:

Preference	Description
Bring Up Alerts	Select this option to display the Monitor Alerts screen on login to FactorSoft.

Scheduling the Lien Monitoring Service

The Account Monitoring service is scheduled using the Schedule Task Processor option accessed from the Administration module's System menu. To schedule the service, create a name for the template in the **Service template** field, select the **First Corporate Monitoring** service on the Parameters tab, and save the template. Then, update the Scheduling tab to run the service at the desired intervals and save the template.

For detailed instructions on updating the Schedule Services screen, see Scheduling Reports and Services in the FactorSoft Reports Guide.

> **NOTE**
>
> The **Account Monitoring** task must be enabled in the Engine for requests to be sent and alerts received.
>
> Also, note that the Account Monitoring service must have been scheduled and processed at least one time for the Jurisdiction table to be accessed from the monitoring agency. Until this is done, the State and Jurisdiction lists in the Monitor Requests screen will be empty.

Accessing Lien Monitoring Screens

The Account Monitoring functions are accessed on two screens: The Monitoring Request screen and the Monitoring Alerts screen.

Monitoring Request Screen

Click the **Account monitoring** button on either the Liens/monitoring tab of the Client Information screen or the Address tab of the Debtor Information screen to access the Monitoring Requests screen:
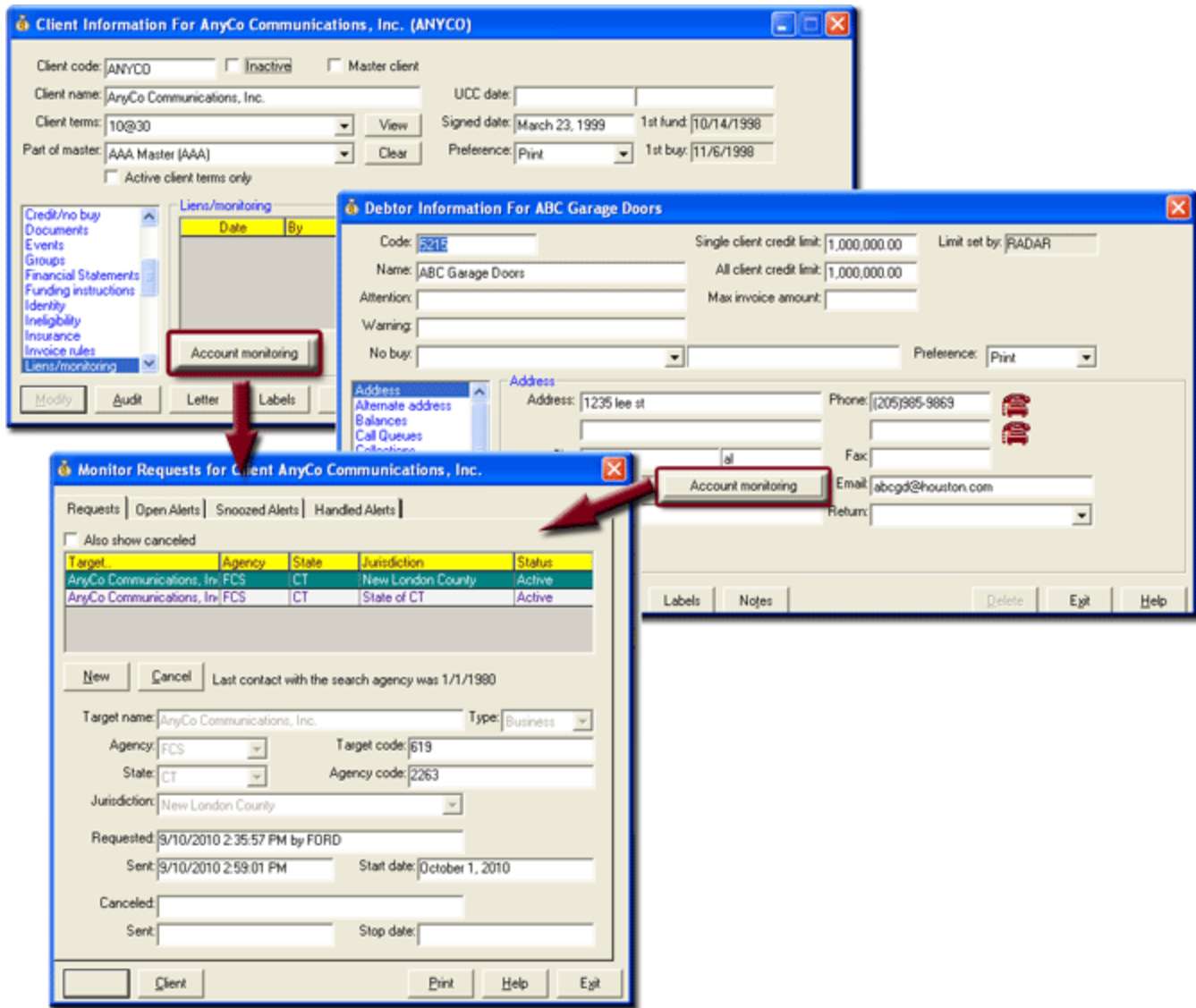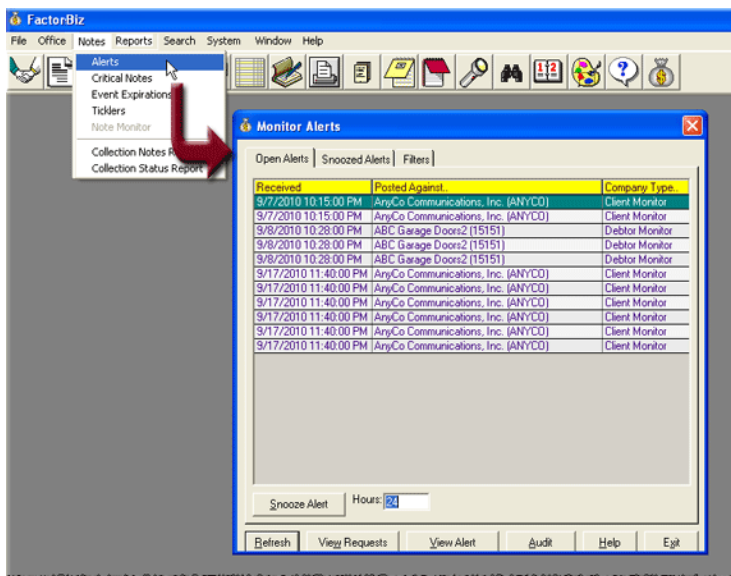

The Monitoring Requests screen is used to:

- Create new monitoring targets

- Monitor open alerts

- Marking alerts handled

- Cancel monitoring on a target

- Snoozing alerts

Monitor Alerts Screen

The Monitor Alerts screen is accessed from the Alerts option in the Notes menu. This screen is used to monitor open alerts received on monitoring targets.

Monitor Requests Screen

The Monitor Request screen is used to create, and displays details for already existing, monitoring targets. A monitoring target is the combination of a client, debtor, or individual associated with client or debtor, and a state and jurisdiction.

Lien Monitoring Functions

The following sections of this guide describe the procedures for creating and monitoring accounts using the Lien Monitoring.

Creating New Monitoring Targets

A monitoring target is the combination of a client, debtor, or individual associated with client or debtor, and a state and jurisdiction. The following instructions detail the steps for creating the target.
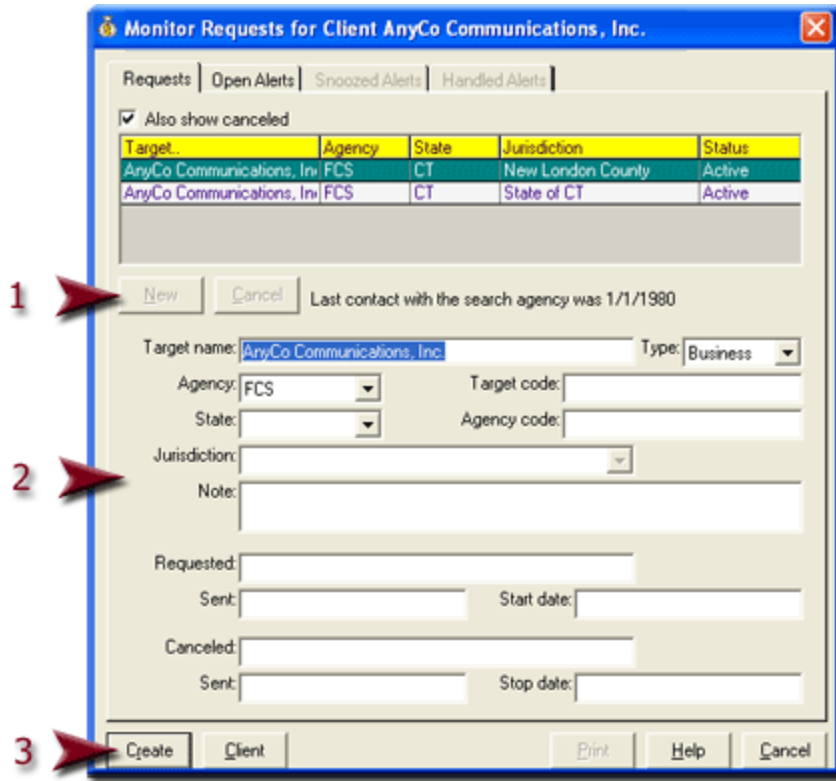
> **NOTE**
> Once the target is created, the request is transmitted to First Corporate Solutions via the Engine.

To create a monitoring target, access the Requests tab on the Monitor Requests screen for the client or debtor as described in Accessing the Account Monitoring Screens above, and then:

1. Click the **New** button.

   The fields on the screen are cleared to allow you to create a new request.

2. Complete the data entry fields, as described below:

Field	Description
Also show canceled	Select this option to show active and canceled targets in the grid. If this field is not selected, only active targets are displayed.
Grid	The grid displays monitoring requests previously submitted for the client or debtor: • Target. The entity being monitored • **Agency.** The monitoring agency • State. The State in which the target is monitored • Jurisdiction. The jurisdiction in which the target is monitored • Status. The status of the request (Active, Waiting Add, Canceled, Waiting Cancel)
Target name	Enter the name of the entity to be monitored. This field displays the client or

Field	Description
	debtor name by default, but you can enter the name of another business or individual liable for the client or debtor.
Type	Select the target type. • Business. Select this type if the target is a company or other business entity. • Individual. Select this type if the target is a person.
Agency	Defaults to FCS.
State	Select the State for the monitoring target. A target always contains both a State and Jurisdiction, even if the Jurisdiction is the state.
Jurisdiction	Select the jurisdiction for the monitoring target. The Jurisdiction is either a county within the selected State, or the State itself. In addition, FCS does not monitor strictly at the county level. If monitoring is defined by county, FCS automatically sets up the client and/or the debtor by state.
Note	Add notes specific to the request when the new request is entered. The notes are then displayed in this field when the user views an existing request on this screen.
Target code	After the target is saved, this field displays a FactorSoft generated Target Code, which is used for internal purposes.
Agency code	After the target is saved, this field displays a FactorSoft generated Agency Code, which is used for internal purposes.
Requested	After the target is saved, this field displays the date and time that monitoring was first requested, as well as the user who submitted the request.
Sent	After the target is transmitted, this field displays the date and time the monitoring request was sent to First Corporate Solutions from FactorSoft.
Start date	Displays the Start Date for monitoring (the official date First Corporate will begin monitoring the target). This is returned to FactorSoft from FCS after the monitoring request is transmitted

Field	Description
Canceled	Displays the date and time that monitoring was canceled for the target, as well as the user who canceled the request, if applicable.
Sent	Displays the date and time the request to cancel monitoring for the target was sent to FCS from FactorSoft.
Stop Date	Displays the Stop Date for monitoring (the official date FCS will halt monitoring the target). This is returned to FactorSoft from FCS after the cancellation request is transmitted.
Debtor or Client	Click this button to display the Client Information or Debtor Information screen for the selected client or debtor.

3. Click the **Create** button to save and transmit the target.

   The request is transmitted to First Corporate Solutions via the Engine. When the confirmation response is returned to FactorSoft, the **Start Date** field is completed, as shown next:

   > **NOTE**
   > The start date is always the first day of the month following the request date. For instance, if the requested date is 11/15/22, the start date will be 12/1/22.

Monitor Alerts

The *Monitor Alerts* screen displays open alerts for clients. Alerts are returned from a third-party lien monitoring service.

> **NOTE**
>
> Before Integrated Account Monitoring functions are available in FactorSoft, a user account with First Corporate Solutions (FCS) must be obtained. The liens monitoring is activated in System Preferences and FactorSoft can also be configured to warn or prevent purchase when a client has an open alert. See System Preferences below for details.

Users that are tasked with monitoring client alerts can elect to automatically display the Monitor Alerts screen on login to FactorSoft. In User Preferences, select the Bring up on Login tab, and select the **Bring up Alerts** option.

Open Alerts Tab

Use this tab to view alerts for clients based on your selection criteria specified on the **Filters** tab.

Monitor Open Alerts

When an alert is returned to FactorSoft from FCS on a monitored target, the client or debtor associated with the monitoring target is automatically updated to a No-buy state (if System Preferences **Action if a debtor has an open alert** and **Do not allow Input on client with open alert** are so configured).

Two methods are provided to access and review alerts returned by the monitoring service.

1. First, you can review all alerts for all clients or debtors by selecting the Alerts option on the **Notes** menu.

Field	Description
(Grid)	Displays open alerts for all clients. • Received: the date on which the alert was received • Posted Against: the client or debtor name for which the alert was received (Alerts received for a debtor that has been combined into another debtor are displayed in the Alerts panel under the name of the debtor into which the original debtor was combined. Also, the grid can be sorted in ascending alphabetical order by Posted Against name by clicking this column heading) • **Type**: the alert type within partner/provider • Company: the alert partner/provider (Ansonia, MCB, etc.)
Snooze Alerts	Click this button to delay the No-Buy affect of the selected alert for the displayed default number of **Hours**. The Alert is moved from the Open Alerts tab to the Snoozed Alerts tab for the specified number of hours.
Refresh	Click this button to update the information in the grid of the Monitor Alerts

Field	Description
	screen.
View Requests	Select a line-item and click this button to view the Monitor Requests screen for the client or debtor associated with the alert.
View Alert	Select a line-item and click this button to open a browser that displays the formatted alert from First Corporate Solutions, as shown next.

The Alerts tab lists the alerts returned by the monitoring service. The screen can list all alerts if unfiltered, or can be filtered using the Filter tab. A message appears on the Alerts tab when the results are filtered.

History Tab

The History tab list alerts received within a given date range.

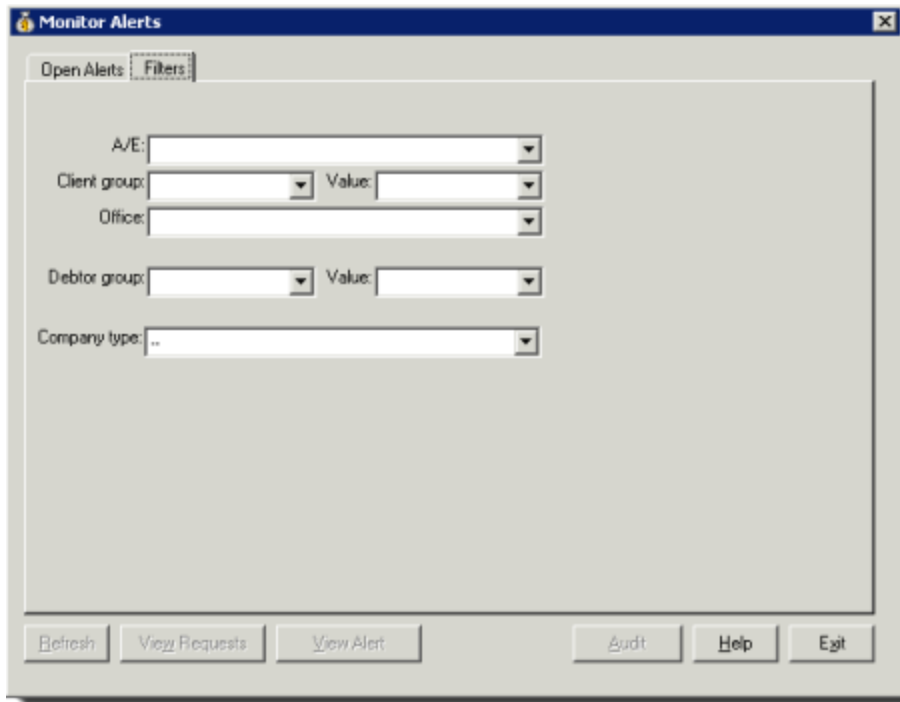| Field	Description
Date From	Enter the beginning date of the date range for alerts to be displayed.
Thru	Enter the ending date of the date range for alerts to be displayed.
Load	Click this button to display alerts matching the date range parameters in the grid.
(Grid)	Each alert matching the date range parameters is displayed as a line-item in the grid with the following details. • Received. The alert date • Posted Against. The debtor name • Company. The alert partner/provider (Ansonia, MCB, etc.) • Type. The alert type within partner/provider • Closed. The alert closed date, where applicable.

Snoozed Alerts Tab

If the Account Monitoring module is configured to allow alert snoozing, the user can set a time period for an open alert in which the No-Buy condition of the client or debtor affected by the alert is suspended. Once the time period expires, the alert takes effect and the client or debtor is flagged as No-Buy. The snooze can be set on an alert from either the Monitor Alert screen or the Monitor Request screen.

The Snoozed Alerts tab of the Monitor Alerts screen displays the alerts that are currently snoozed.

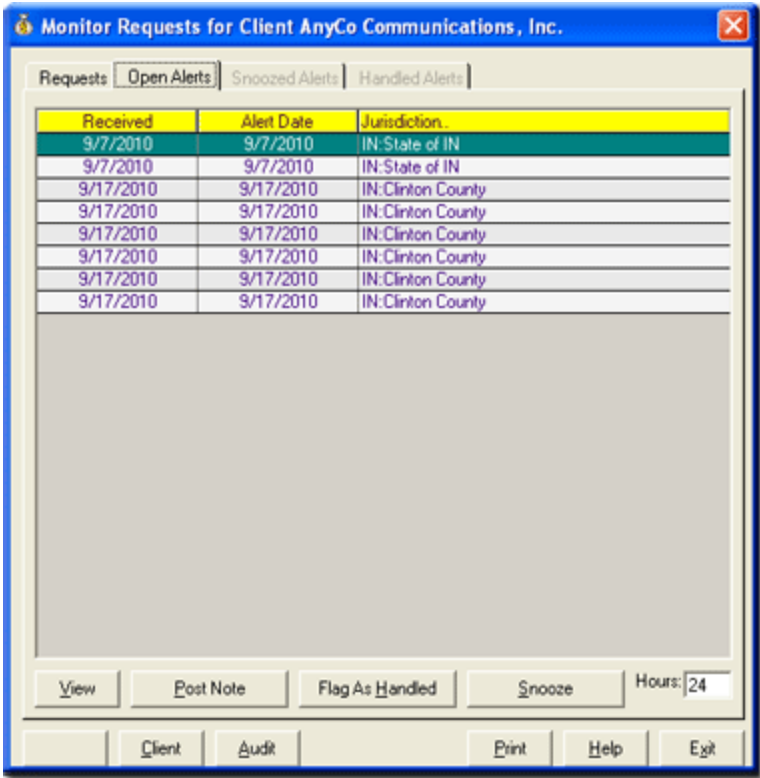| Field	Description
(Grid)	Displays snoozed alerts for all clients.
View	Select a line-item and click this button to display the
Un-snooze Alert	Select an alert line-item and click this button to cancel the snooze function on the alert when the snooze hours have not yet expired.

Filters Tab

The Filters tab is used to select selection criteria for the alerts to be displayed on the Alerts tab. Note that a message appears on the Alerts tab when the results are filtered.

Field	Description
A/E	Select an Account Executive to which to limit the alert queue, or leave this field blank to include all AE's.
Client group	Select the client group to which to limit the alert queue results from the list. Client Groups are defined in the Client Group Code Table.
Value	Select the specific client group value to which to limit the alert queue results from the list.
Office	Select the office to which to limit the alert queue results from the list. Offices are defined in the Office Table.
Debtor group	Select the debtor group to which to limit the alert queue results from the list. Debtor Groups are defined in the Debtor Group Code Table.
Value	Select the specific debtor group value to which to limit the alert queue results from the list. Debtor Groups are defined in the Debtor Group Code Table.

Field	Description
Company type	Select the company type to which to limit the alert queue results from the list. Available types are: • Client Monitor • Debtor Credit (TransCredit) • Debtor Credit (MCB) • Debtor Credit (Ansonia) • Debtor Monitor

2. You can also view the alerts for specific clients or debtors from the Monitor Requests screen's Open Alerts tab:

Field	Description
Grid	Displays all open alerts for the client or debtor. If an alert has a note posted to it, the note text appears when you float the cursor over the line-item.

Field	Description
View	Select a line item and click this button to open a browser that displays the formatted alert from FCS.
Post Notes	Select a line item and click this button to add a note to the alert. The Post Note Against Alert screen appears. Enter the note text in the screen and click OK to post the note to the alert.
Flag as Handled	Select a line item and click this button to flag the line item as handled. This moves the item from the Open alerts list to the Handled alerts list.
Snooze	Select an alert and click this button to delay the No-Buy affect of the alert for the displayed default number of Hours. This button only appears if System Preference Field/screen behavior, Screens, **Monitor alerts**, **Allow alert snoozing** is set to **True**.
Hours	Enter the number of hours to snooze the alert and then click Snooze to delay the affect of the alert for a specified number of hours. This field is only required if you are snoozing the alert for a number of hours other than the default. This field only appears if System Preference Field/screen behavior, Screens, Monitor alerts, Allow alert snoozing is set to **True**.

Interface Credentials Tab

The Interface Credentials tab displays the login status for third-party interfaces. Each time a FactorSoft service passes login credentials to an interface, the success or failure of that attempt is recorded as a line-item in the Interface Credentials tab. Note that the Descr column is the template name configured for the service in the Schedule Services screen of the Administration module.

System Preferences

The following system preferences for this function are found in the Administration module, System Preferences,**Client rules/defaults**, **Ineligibility/summary calculation**, **Release tab** folder.

Preference	Description
Do not allow reserve release if there is an open alert	Select the action that FactorSoft is to take if the client has an open alert when the user attempts to release reserves: • No. Allow the release without interruption • Yes. Prevent release

The following system preferences for this function are found in the Administration module, System Preferences,**Data entry behavior**,**General** folder.

Preference	Description
Do not allow input if there are open alerts	Select the action that FactorSoft is to take if the client has an open alert when the user attempts to update a purchase: • No. Allow the update without interruption • Yes. Prevent update

The following system preferences for this function are found in the Administration module, System Preferences,**Data entry behavior**,**Purchase update** folder.

Preference	Description
Action if a debtor has an open alert	Select the action that FactorSoft is to take if the debtor has an open alert when the user attempts to update a purchase: • Nothing. Allow the update without interruption • Warning. Display a warning message before allowing the update • Do not allow update. Prevent update.
Action if a debtor is no-buy	Select the action that FactorSoft is to take if the debtor is flagged with a no-buy reason when the user attempts to update a purchase: • **Nothing.** Allow the update without interruption • **Warning.** Display a warning message before allowing the update • **Do not allow update.** Prevent update

The following system preferences for this function are found in the Administration module, System Preferences,**Identification/system constants**, **Interface parameters**, **Monitoring** folder.

| Preference	Description
Allow client monitoring	Set to **True** to enable the Account Monitoring button on the Liens/monitoring panel of the Client Information screen. This button is used to access the Monitor Requests screen for the selected client.
Allow debtor monitoring	Set to **True** to enable the Account Monitoring button on the Address panel of the Debtor Information screen. This button is used to access the Monitor Requests screen for the selected debtor.

Preference	Description
First corporate monitoring username	Enter the username with which you log into the monitoring interface, supplied to you by First Corporate Solutions. This username, along with the password, is passed to the monitoring interface by FactorSoft to permit integrated monitoring.
First corporate monitoring password	Enter the password, supplied by First Corporate Solutions, used to log into the monitoring interface.

Marking Alerts as Handled

When you have reviewed the alert and have, based on your internal procedures, resolved the issue related to the alert, you remove the alert from the Open Alerts list by marking it as "handled". Note that flagging an alert as handled merely moves it from the Open Alerts list to the Handled Alerts list – there is no transaction associated with this action.

To flag an alert as handled on Monitor Requests screen:

1. Select the line-item for the alert in the Open Alerts tab's list.

2. Click the **Flag as Handled** button.
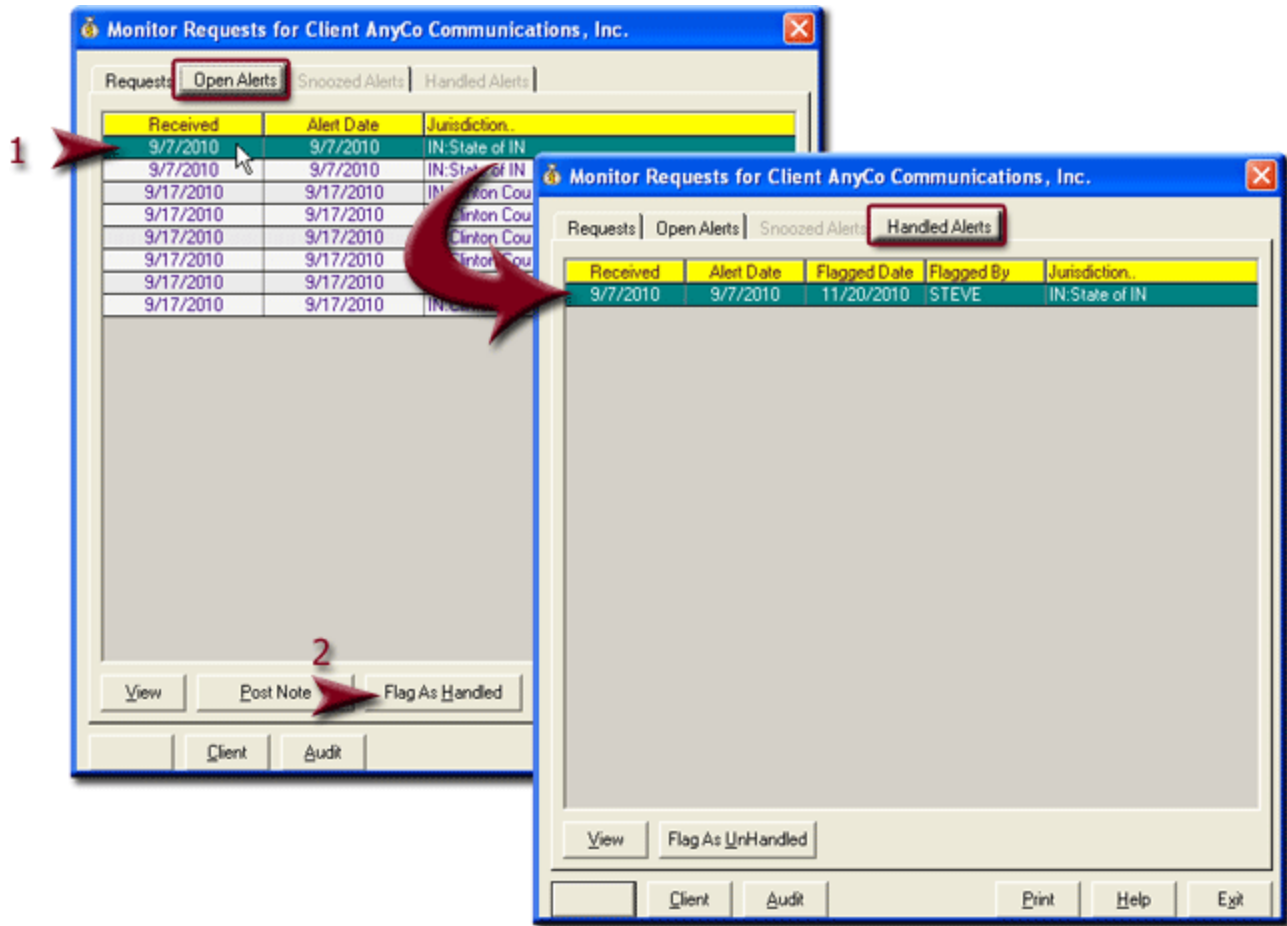
The alert is moved from the Open Alerts tab to the Handled Alerts tab.

> **NOTE**
> The **Flag as UnHandled** button on the Handled Alerts tab. You can use this button if, for instance, an alert is marked as handled by mistake. Select a handled alert from the grid and click this button to move the alert back to the Open Alerts queue.

Canceling Monitoring of a Target

Typically, you will monitor a target only temporarily or periodically. For instance, you may choose to monitor a new or prospective client at the beginning of the relationship and then after the lien search is performed with no alerts, you may wish to stop monitoring the client.

To cancel monitoring for a target, on the Requests tab of the Monitor Request screen:

1. Select the line-item for the monitoring target from the grid.

2. Click the **Cancel** button.

   The Engine will send target monitoring cancellation requests repeatedly with each scheduled process until the stop date is received from the vendor.
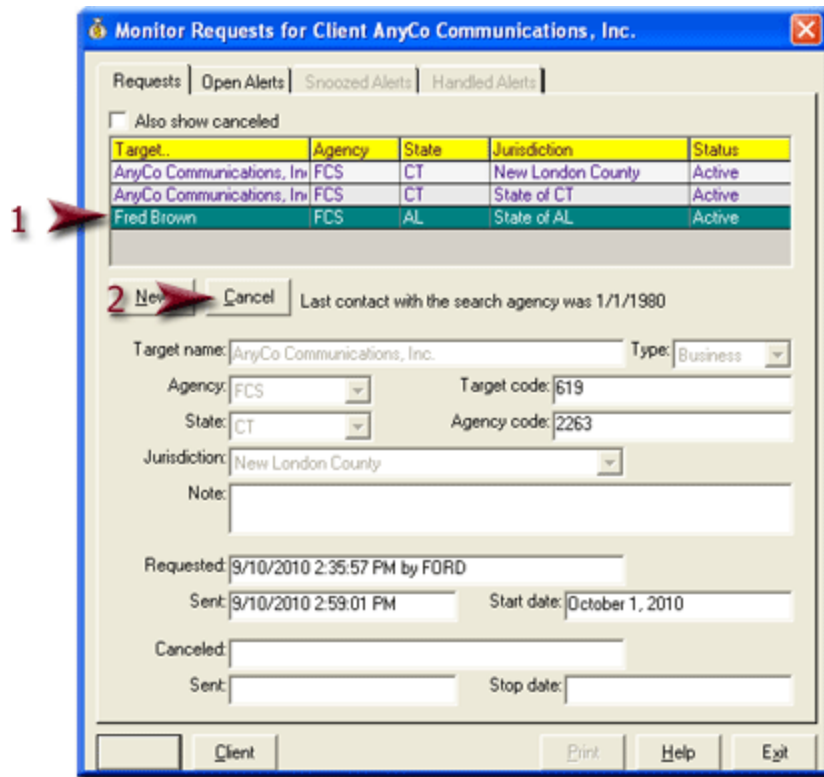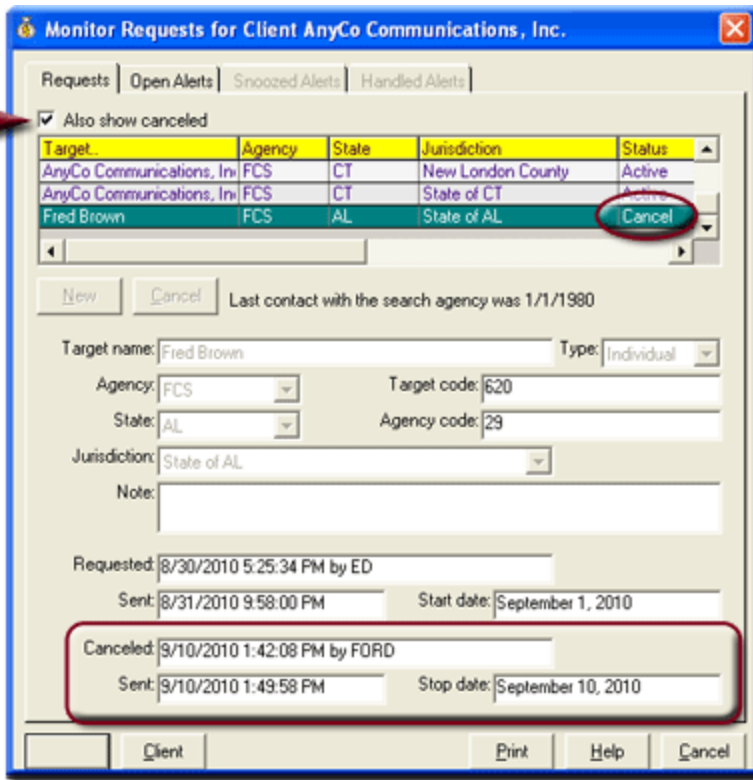

The target is hidden from the grid.

3. To view canceled targets for the client or debtor, select the **Also show canceled** option.

   Note that the **Status** for the target is **Cancel** and that the **Canceled, Sent,** and **Stop date** fields are populated, as described below the illustration:

| Field	Description
Canceled	Displays the date and time that monitoring was canceled for the target, as well as the user who canceled the request, if applicable.
Sent	Displays the date and time the request to cancel monitoring for the target was sent to FCS from FactorSoft.
Stop date	Displays the Stop Date for monitoring (the official date FCS will halt monitoring the target). This is returned to FactorSoft from FCS after the cancellation request is transmitted.

Alert Snooze

If the Account Monitoring module is configured to allow alert snoozing, the user can set a time period for an open alert in which the No-Buy condition of the client or debtor affected by the alert is suspended. Once the time period expires, the alert takes effect and the client or debtor is flagged as No-Buy. The snooze can be set on an alert from either the Monitor Alert screen or the Monitor Request screen. This function is enabled in System Preferences. See the System Preferences section of this guide for details.

Snoozing an Alert

When the snooze function is enabled, a Snooze button and Hours field is included on the Open Alerts tab of the Monitor Requests screen, and a Snooze Alert button and Hours field is included on the Open Alerts tab of the Monitor Alerts screen, as shown below.
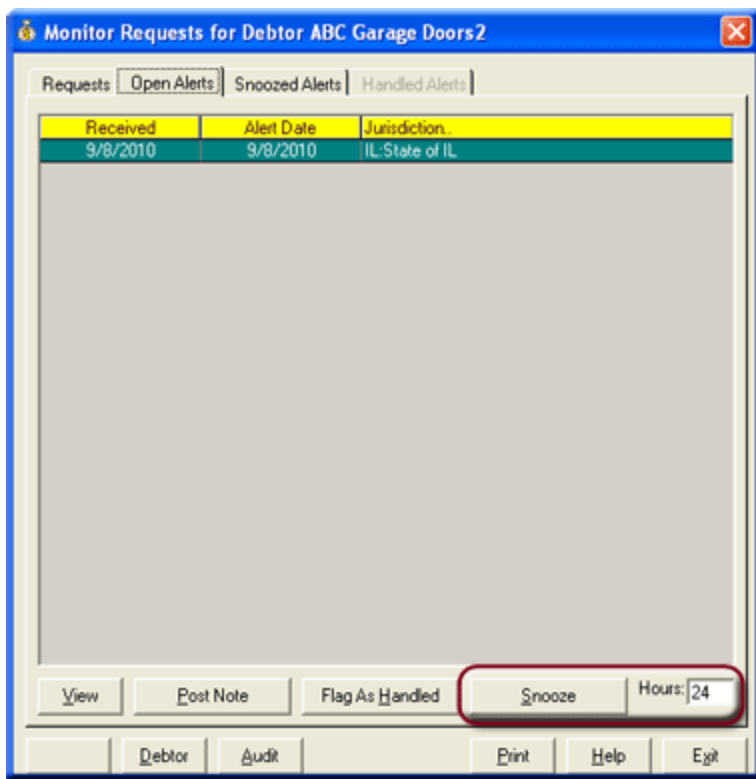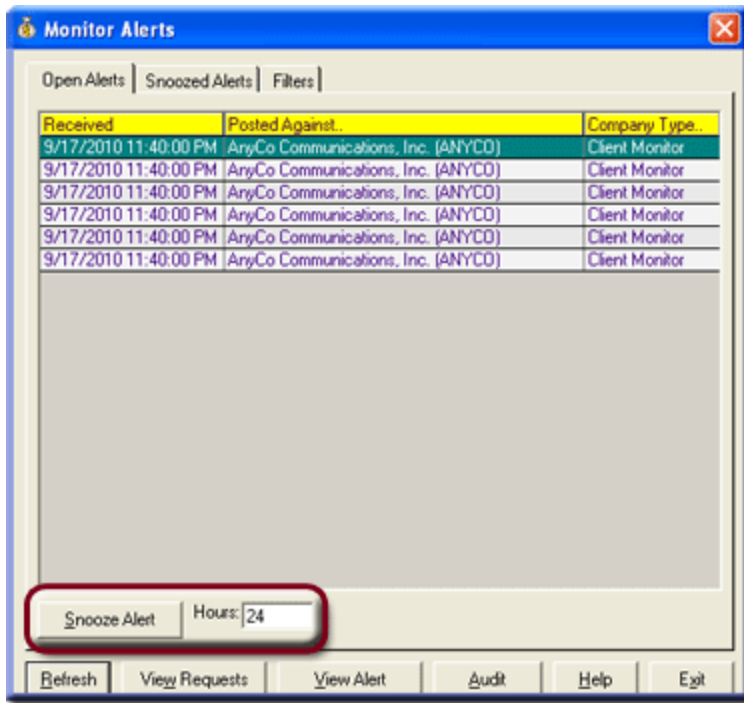
To mark an alert as snoozed and suspend the No Buy condition on the affected client or debtor:

- Select an alert from the list.

- Click **Snooze** or **Snooze Alert** to delay the No-Buy affect of the alert for the displayed default number of Hours.

  > **TIP**
  > If you want to snooze the alert for a different number of hours than the default, enter that number of hours first and then click Snooze.

  The Alert is moved from the Open Alerts tab to the Snoozed Alerts tab for the specified number of hours.

Canceling an Alert Snooze

To cancel the snooze function on an alert when the snooze hours have not yet expired:

- Select the Snoozed Alerts tab on either the Monitor Alerts screen or the Monitor Requests screen for the client, select the snoozed alert in the grid, and click the **Unsnooze** button, as shown below
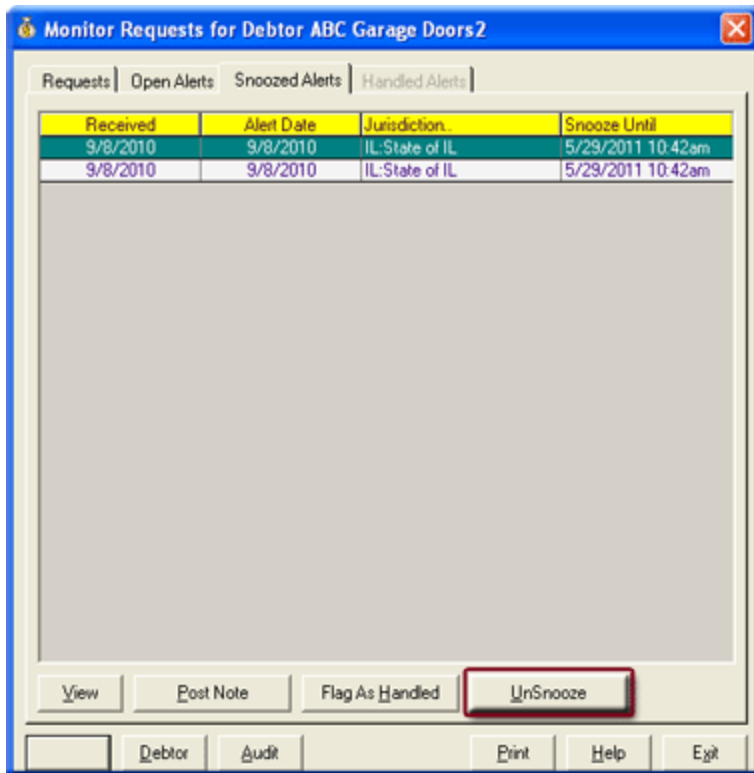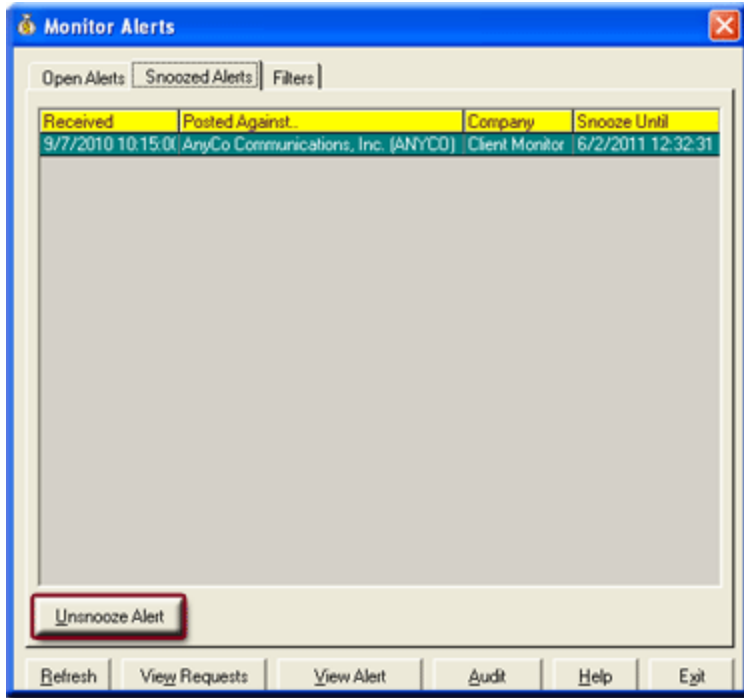
- The alert is moved from the Snoozed Alerts tab to the Open Alerts tab, and the No-Buy status is applied to the client or debtor.

  Note that the grid displays the date through which the alert is suspended.