



PBC Alerts

Quick Reference Card | June 2020

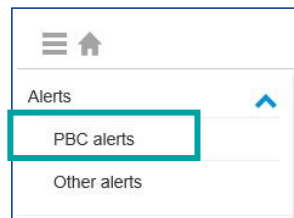
Overview

You can set alerts to receive notifications for the following items:

- Overdue and upcoming PBC alerts
- PBC comments alerts
- PBC custom alerts

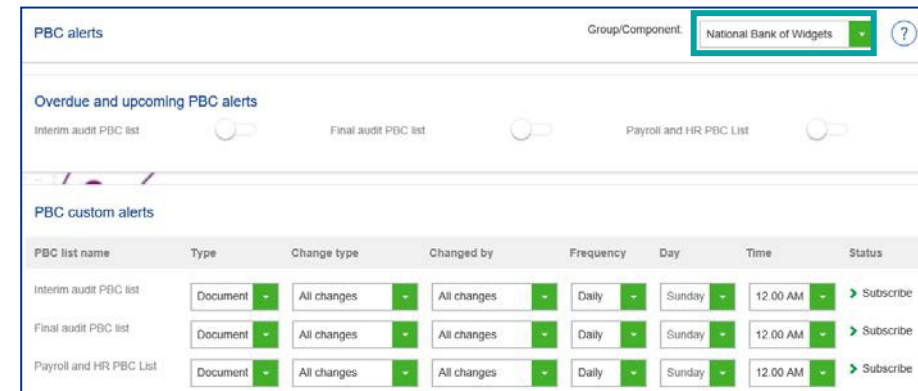
PBC alerts

To access the PBC alerts page, navigate to Home Menu > Alerts > PBC alerts.



Activate alerts to notify you of changes to a PBC list or to documents uploaded to a PBC list, including when the client uploads documents.

If you have access to multiple components, you must select the relevant group/component to populate the PBC lists.

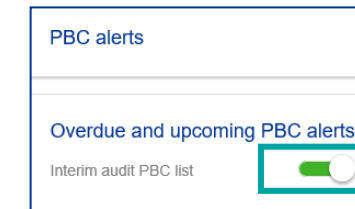
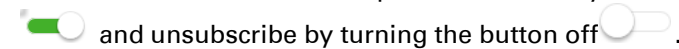


Three types of alert are available:

Overdue and Upcoming PBC alerts

Activate alerts to notify you of the PBC requests which are overdue or will become due in the next seven days and are still pending.

Subscribe to these alerts for specific PBC lists by turning the button on





You will only receive an alert if you are either the client contact or KPMG contact.



Interim requests											
Category ALL PBC Show past due PBC documents Export											
ID	Category	Name	Detailed description	Due date	eAudit reference	Client contact	Status	Comments	KPMG contact	Add document	No. of documents
1	Borrowings	Loan confirmations	Signed bank confirmation letters for each loan account with confirmation response to be addressed to KPMG.			Echols, Lo	Uploaded		Prakash, Lauren A	Upload	1

PBC comments alerts

Activate alerts to notify you of new comments added to PBC requests or PBC documents.

Subscribe to these alerts for specific PBC lists by turning the button on  and unsubscribe by turning the button off. 

You will only receive an alert if you are the client contact or KPMG contact on the PBC item.

Interim requests											
Category ALL PBC Show past due PBC documents Export											
ID	Category	Name	Detailed description	Due date	eAudit reference	Client contact	Status	Comments	KPMG contact	Add document	No. of documents
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PBC custom alerts

Activate alerts to notify you of changes/updates in the PBC document libraries.

PBC document alerts will notify you of documents which have been




uploaded to PBC requests.

PBC request alerts notify you of new PBC requests added into PBC management that have been assigned to you.

You can also select type 'All' to subscribe to both alerts.

Subscribe to or modify these alerts for specific PBC lists by using the following dropdown menus:

PBC custom alerts									
PBC list name	Type	Change type	Changed by	Frequency	Day	Time	Status		
Interim audit PBC list	All	All changes	All changes	Daily	Sunday	9:00 AM	Subscribe		
Final audit PBC list	Document	New items are added	Someone else changes a document	Weekly	Thursday	2:00 PM	Update Unsubscribe		
Payroll and HR PBC List	Request	All changes	All changes	Daily	Sunday	12:00 AM	Subscribe		

- Type:** specify the type of PBC alert subscription. Document (default value), Request, or All.
- Change type:** specify what type of change to be alerted to. All changes (default value), New items are added, or Items are deleted.
- Changed by:** specify changed by criteria. All changes (default value), Someone else changes a document, or Someone else changes a document created by me.
- Frequency/day/time:** specify frequency of alert receipt (based on Eastern time zone).
- Status:** user can subscribe to an alert by clicking  Subscribe Click  Update to save any changes to alert subscription. Click  Unsubscribe to delete alert subscription.

PBC request alerts are sent daily with the Overdue and Upcoming PBC alerts mail.