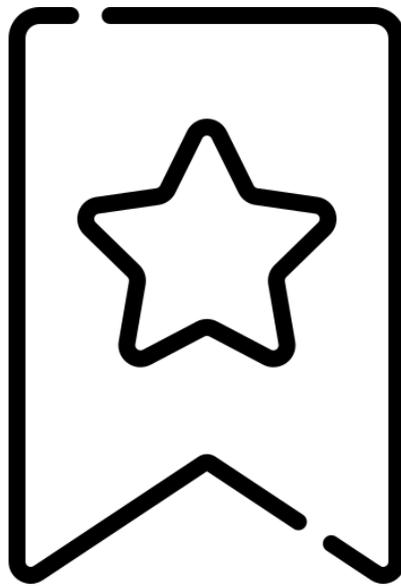


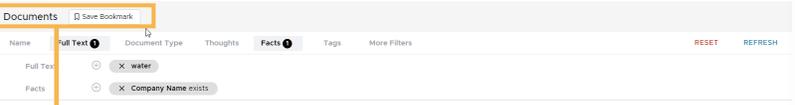
ThoughtTrace Quick Start Guide



Bookmarks

Adding A Bookmark

1. Start by filtering your library using filters like shown below.



CREATE BOOKMARK

Bookmark Name
Force Majeure Report

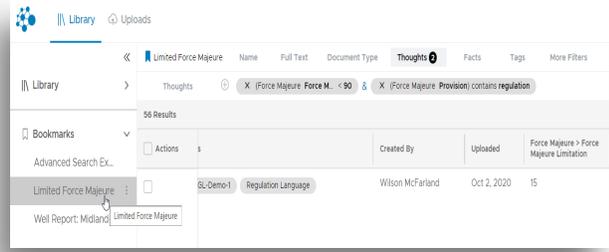
Description
Add a description to your bookmark

Sharing If your bookmark is shared
 Share with all users
 Search Users
 Bob.blubbaw@lawtv
 Hughh.maenn@coolmail.net
 Peter.person@ez.org
 WI

SAVE CANCEL

2. Next, click the bookmark icon. A details pane will slide out on the left-hand side of your screen. From here you can set the bookmark name, description, and **select which users you would like to share this bookmark with.**

Using A Bookmark



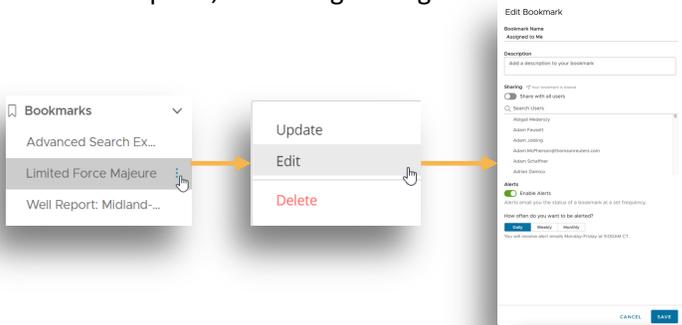
1. Select the **bookmark icon** or the **shared bookmark icon** (👤) on the left-side of your library page. This will cause an option pane to expand.
2. From here, select the bookmark that you would like to use. The filters will be applied to your **library view**.

NOTE: A bookmark that has been shared will have the (👤) symbol next to it.



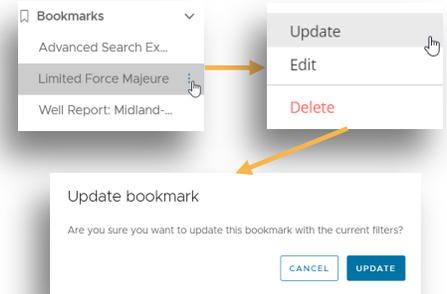
Edit A Bookmark

1. Select the **bookmark icon** on the left-side of your library page. This will cause an option pane to expand.
2. **Hover** your mouse over the bookmark that you would like to edit. This will cause **3 dots** to appear to the right of the bookmark (⋮). Click the dots.
3. Select **Edit**. An edit menu will slide out from the left-hand side of the screen. Use this view to make any changes to the bookmark name, description, or sharing settings.



Update A Bookmark

1. If you wish to add/remove filters from a bookmark, start by selecting the bookmark.
2. Next, add/remove/edit any filters you wish to change for this bookmark.
3. Then, hover the bookmark that you would like to use, select the 3 vertical dots to open the extended menu, and then click update.
4. A pop-up will appear asking if you are sure you want to update the bookmark with the current filters. Select **“Update”**.





Creating an Alert

1. Open the Bookmark Settings
2. Toggle the “Enable Alerts” option on
3. Select the frequency that you want to receive alerts

NOTES:

- Alerts will go to the email associated with your ThoughtTrace account
- Bookmarks report the number of documents that fit the saved search criteria
- Bookmarks deliver on Central Time Zone

