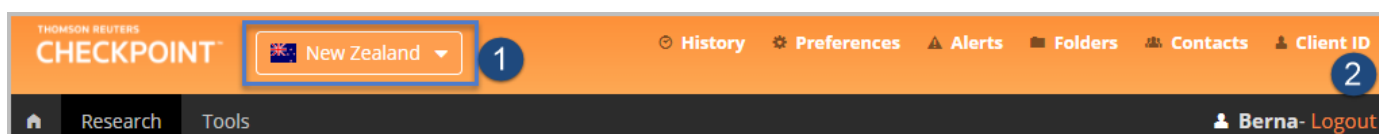# Checkpoint
## Homepage features

Checkpoint's homepage is designed to allow easy access to different areas and features such as search history and folders, as well as quick access to products, tools, and search templates.

## Navigation

The orange and black menu bars are available at the top of every screen in Checkpoint.

1. If you subscribe to both New Zealand and Australian publications, you can move between Checkpoint New Zealand and Checkpoint Australia by selecting the appropriate country from the dropdown.
2. Use the **Logout link** to end your Checkpoint session.

**Note: Workflow** and **Learning** options are not available on the Checkpoint New Zealand site.



The functions of each menu option are listed in the table below:

| SYSTEM TOOLBAR | DESCRIPTION |
| --- | --- |
| HISTORY | Access your recent searches and the documents you have viewed. Checkpoint records and saves your research for a period of 14 days |
| PREFERENCES | Set your preferences for interacting with Checkpoint, including search results display and document export format |
| ALERTS | Access a list of all your alert notifications you have set up. You can view and edit your alerts. |
| CONTACTS | Access a list of contacts within your Checkpoint subscription so you can share folders with |
| FOLDERS | Retrieve search results and documents you have saved in the past. You can organise your saved searches and documents into folders for easy retrieval |
| CLIENTS ID | Enter a client ID to help distinguish documents between projects and clients |

| NAVIGATION TOOLS | DESCRIPTION |
| --- | --- |
| HOME | Click Home for direct access back to the Home page |
| RESEARCH | Click Research to access content specific search templates for searching and browsing |
| TOOLS | Click Tools to access calculators, checklists, decision tree, flowcharts, templates, and model documents |

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## Overview

Each box on the homepage contains specialised content. All of these, excluding the search bar, can be moved around the homepage to suit your specific needs by 'dragging and dropping'. Each box can also be minimised or maximised by clicking the — minimise icon in the top right-hand corner.



1. Conduct a Terms & Connectors search across all your subscribed products, including Tools, by entering your keywords into the search field. As you type, suggested terms may appear to assist in your research.
2. Click the **Help with your Search** link to view a list of Terms & Connectors available to use.
3. To run a more targeted search, select one of the **Browse by Topic** links to be directed to a topic-specific search template.
   **Note:** These templates are subscription dependent.
4. You can also access these and other search options by clicking **Research** in the black navigation toolbar.
5. **My Quicklinks** are content that you bookmark in Checkpoint. You can create a quicklink anywhere you see a star icon by clicking on the star, entering a relevant name, and clicking save.
6. The **Tax and Accounting Compliance Calendar** displays relevant compliance dates which are highlighted in orange. Click on the date to view the calendar item and applicability.
7. **News Headlines** provides a daily feed to selected Thomson Reuters Tax and Accounting news articles.
8. **What's New** provides links to new training material and other resources.
9. **Customer Service** provides links to Australian and New Zealand contact information.
10. **My Products** lists up to 20 of your subscribed products in alphabetical order. To view a complete list, click the **View More Products** link. To search or browse a product, click the title.
11. **My Tools** lists up to 10 tools in alphabetical order. To view a complete list, click the **View More Tools** link. To search or browse a tool, click the title.