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# Elevate help guide: Set up and manage alerts

**Standard Life**

There's a lot to look forward to

# Set and amend alerts that you receive

## What you will see

This screen lets you configure the types of alerts that you want to receive.

The screenshot shows the 'Alerts' preferences page. At the top, a navigation bar includes 'Dashboard', 'New Client', 'Existing Clients', 'Business Mgmt', 'Research', and 'Model Portfolios'. Below this, a sub-navigation bar has 'Dashboard' and 'Alerts' (with a red dot and callout 1). Under 'Alerts', there are 'Summary' and 'Preferences' tabs, with 'Preferences' selected (callout 2). The main content area is titled 'Select the alerts to display on the Elevate homepage' and includes a warning: 'Please note that certain, high priority alerts cannot be disabled as they indicate that immediate action is required.' Below this is a table with columns for 'Action Required', 'Important Information', and 'Information'. The table lists various alert types with checkboxes for each column. Callout 3 points to the 'Retirement Alerts' section, and callout 4 points to the 'Save' button at the bottom. Below the table is an 'Email Notifications' section with a dropdown menu set to 'Daily' (callout 3) and a 'Save' button (callout 4).

	Action Required	Important Information	Information
Stockbroking Alerts	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)
Corporate Action Decision	<input checked="" type="checkbox"/>		
Corporate Action Information			<input type="checkbox"/>
Stock Order Complete			<input type="checkbox"/>
Retirement Alerts	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)
Client Approaching 75	<input type="checkbox"/>		
Client Approaching 75 - 3 year wake up	<input type="checkbox"/>		
Client Approaching 75 - Reminder	<input type="checkbox"/>		
Client approaching intended retirement date (IRD)	<input type="checkbox"/>		
Client approaching intended retirement date (IRD) - 3 year wake up	<input type="checkbox"/>		
Client approaching intended retirement date (IRD) - reminder	<input type="checkbox"/>		
Drawdown pension - GAD review	<input checked="" type="checkbox"/>		

## What you will need to do

1. Go to **Dashboard > Alerts > Preferences**.

You'll see a list of alerts, including your fixed mandatory alerts.

2. Tick the alerts you want to receive and untick any you don't.

3. In **Email Notifications**, set the frequency of your email alerts.

4. Click **Save** to update your preferences.

## Notes

1. You can only configure your alerts if your firm settings allow you to do so. Speak to your Elevate super user or contact us for more information.

3. These are emails to let you know you have an unread alert.

4. You can amend these preferences at any time.

# Setting your alerts for different adviser users in your firm

## What you will see

You can choose to receive the same alerts for all users, or you can choose to receive different alerts for different users or groups of users.

The screenshots show the 'Preferences' page for 'Preference Set 2' in the first image, 'Preference Set 1' in the second, and 'Preference Set 2' in the third. The 'Alerts' table in the first screenshot has the following rows and columns:

	Action Required	Important Information	Information
Stockbroking Alerts	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)
Corporate Action Decision	<input checked="" type="checkbox"/>		
Corporate Action Information			<input checked="" type="checkbox"/>
Stock Order Complete			<input type="checkbox"/>
Retirement Alerts	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)	<input type="checkbox"/> (all)

The 'Set Members' list in the second screenshot contains: Adviser Three, Adviser Four, Adviser Five, Adviser Six, Adviser Seven, and Adviser Eight. The 'Unassigned Members' list in the second screenshot contains: Adviser One.

## What you will need to do

1. Go to **Preference Set 1** or **Preference Set 2**.
2. Tick the alerts you want to receive and untick any you don't.
3. Return to **Default Set**.
4. Move users from **Set Members** to **Unassigned Members** using the arrow buttons.
5. Go back to **Preference Set 1** or **Preference Set 2**.
6. Move users from **Unassigned Members** to **Set Members** using the arrow buttons.
7. Click **Save**.

## Notes

Paraplanners may find this is useful; for example, if they only want to receive alerts for accounts managed by certain advisers within their firm.

If you want to keep the same alert preferences for all users, you can skip this section.

# Checking and deleting your alerts

## What you will see

### Checking your alerts



### Deleting your alerts

A screenshot of the Alerts table. The table has columns for Date, Alert, Type, Client Affected, Status, and Delete. The first row is highlighted with a circled '1' pointing to the 'Delete' checkbox, which is checked. Below the table is a 'Save' button and a pagination control showing 'Page 1 of 1'.

Date	Alert	Type	Client Affected	Status	Delete
7-Oct-13 6:56 am	<a href="#">Insufficient cash to pay charges</a>	Action Required	<a href="#">EL1024179</a>	Unread	<input checked="" type="checkbox"/>
7-Oct-13 6:56 am	<a href="#">Insufficient cash to pay charges</a>	Action Required	<a href="#">EL1029463</a>	Unread	<input type="checkbox"/>
7-Oct-13 6:55 am	<a href="#">Insufficient cash to pay charges</a>	Action Required	<a href="#">EL1096141</a>	Unread	<input type="checkbox"/>
5-Oct-13 7:38 pm	<a href="#">Remuneration &amp; Charges</a>	Action Required	<a href="#">EL1029463</a>	Unread	<input type="checkbox"/>
5-Oct-13 7:38 pm	<a href="#">Remuneration &amp; Charges</a>	Action Required	<a href="#">EL1024179</a>	Unread	<input type="checkbox"/>
5-Oct-13 7:38 pm	<a href="#">Remuneration &amp; Charges</a>	Action Required	<a href="#">EL1023691</a>	Unread	<input type="checkbox"/>
5-Oct-13 7:38 pm	<a href="#">Remuneration &amp; Charges</a>	Action Required	<a href="#">EL1023246</a>	Unread	<input type="checkbox"/>

## What you will need to do

1. Go to **Dashboard > Alerts > Summary**.

1. Tick **Delete** and click **Save** to remove any alerts you don't want to keep.

## Notes

1. You'll see the most recent alerts first, the type of alert and if any action is required.

## Hints and tips

- Certain high-priority alerts cannot be changed as they need immediate action. Other Elevate alerts are non-mandatory and you can amend them at any time.
- Alerts are triggered on the Elevate platform to provide you with information and raise awareness of actions required on a client account. For example, an alert would be triggered if the client is approaching retirement or if there was insufficient cash to pay charges.
- You'll receive an email letting you know you need to log in to read the alert and take the appropriate action. We'll continue to send you email notifications until you've read the alert.

## Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

If there is anything more you want to know, please contact us.

### Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

### Email us at [Elevate\\_Enquiries@standardlife.com](mailto:Elevate_Enquiries@standardlife.com)

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

### Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

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