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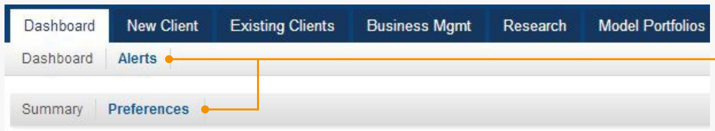
Elevate help guide: Set up and manage alerts

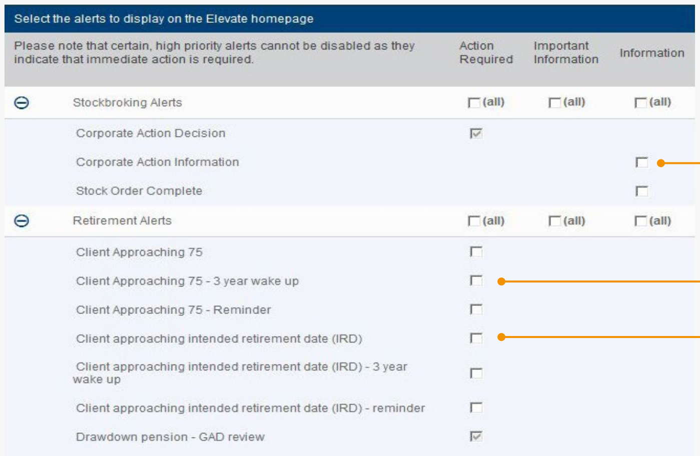
Standard Life
There's a lot to look forward to

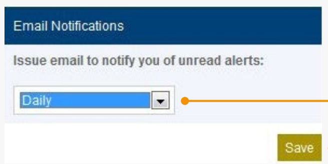
Set and amend alerts that you receive

What you will see

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







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.

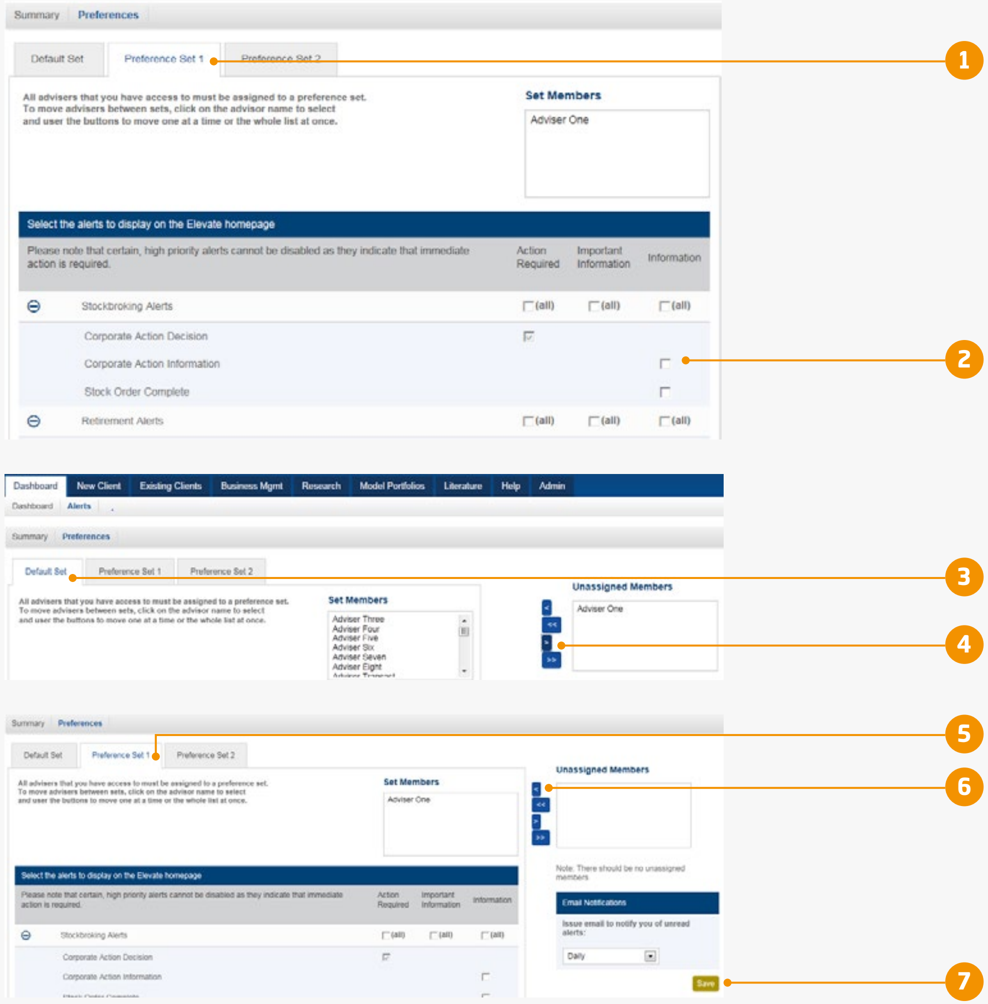
3. These are emails to let you know you have an unread alert.

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.



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.

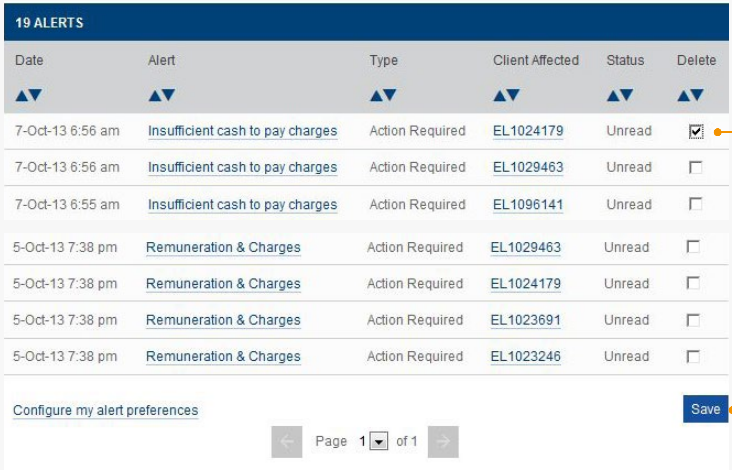
If you want to keep the same alert preferences for all users, you can skip this section.

Checking and deleting your alerts

What you will see

Checking your alerts

Deleting your alerts



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

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.

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