

For financial adviser use only.

Elevate help guide

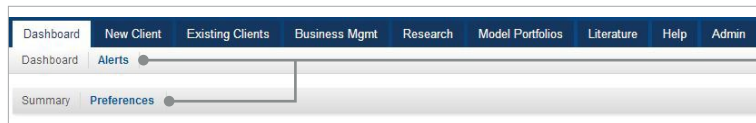
Set up and manage alerts

abrdn.com

Set and amend alerts that you receive

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

What you will see



1.

Select the alerts to display on the Elevate homepage

Please note that certain, high priority alerts cannot be disabled as they indicate that immediate action is required.

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

2.

Email Notifications

Issue email to notify you of unread alerts:

3.

4.

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

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 see

The screenshot shows a multi-step process for configuring alerts. Step 1 shows the 'Preference Set 1' tab with a 'Set Members' list containing 'Adviser One' and a table of alert types with checkboxes. Step 2 highlights the 'Corporate Action Decision' checkbox. Step 3 shows the 'Default Set' tab. Step 4 shows the 'Unassigned Members' list with 'Adviser One' and arrow buttons. Step 5 shows the 'Preference Set 1' tab again. Step 6 shows the 'Unassigned Members' list with a note 'There should be no unassigned members'. Step 7 shows the 'Email Notifications' section with a 'Daily' dropdown and a 'Save' button.

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

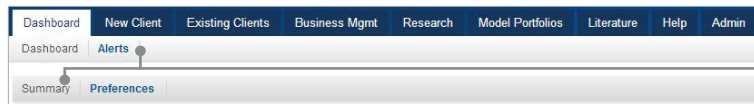
Paraplanners may find this is useful; for example, if they only want to receive alerts for accounts managed by certain advisers within their firm.

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

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

[Configure my alert preferences](#) Save

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.

Helpful Hints

- 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 9am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@abrdn.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

For more information visit abrdn.com/adviser

Elevate Portfolio Services Limited is part of abrdn Group, which comprises abrdn plc and its subsidiaries.

Elevate Portfolio Services Limited is registered in England (01128611) at 280 Bishopsgate, London EC2M 4AG and authorised and regulated by the Financial Conduct Authority.

SLE0100 1222

abrdn.com

STA1222443084-001