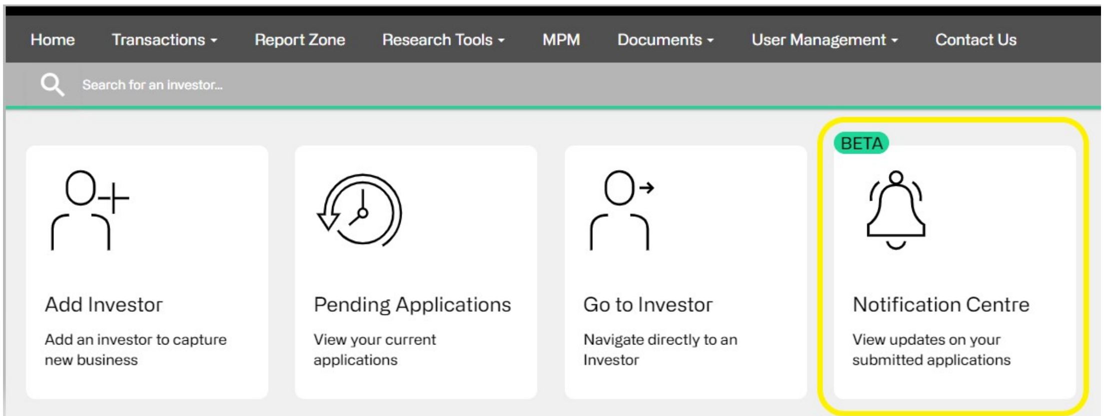
# Your guide to the Notification Centre

We're currently rebranding from Novia to Wealthtime. You'll notice that some of our products and services still use the name Novia while we're transitioning over to the new name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

The Notification Centre has replaced the Status Update section on Adviser Zone. It’s your one-stop shop for updates on client cases and submissions. You can track all in progress client business and view the details on completed cases.

It can be found here on the Adviser Zone dashboard:




You can use it to:

- Filter by investor, product or process.
- View the most requested updates using quick picks.
- Enjoy dual screen functionality.
- Use our improved case tracker.
- Receive transfer out updates.
- Quickly respond to document required notifications.

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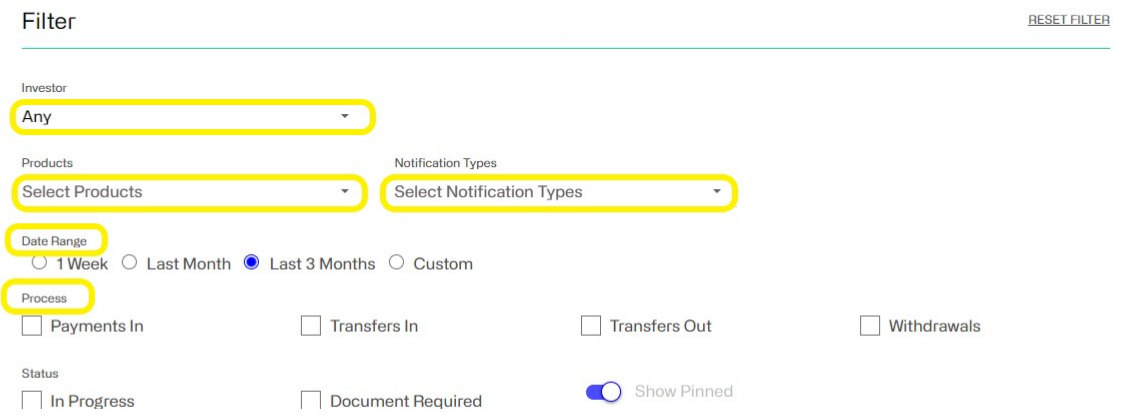
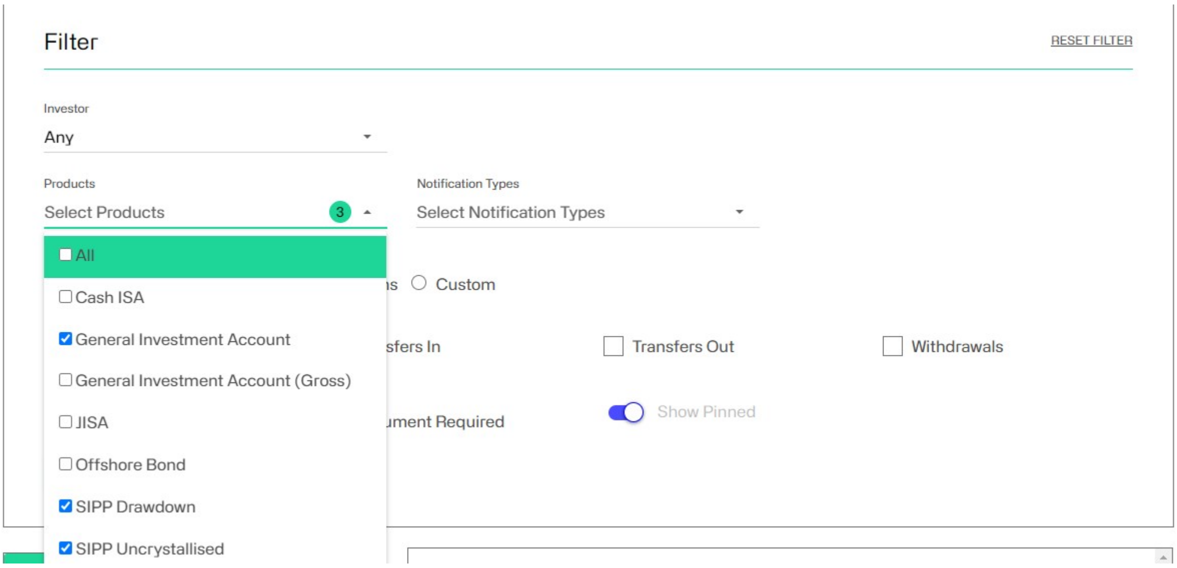
## Filtering by investor, product or process

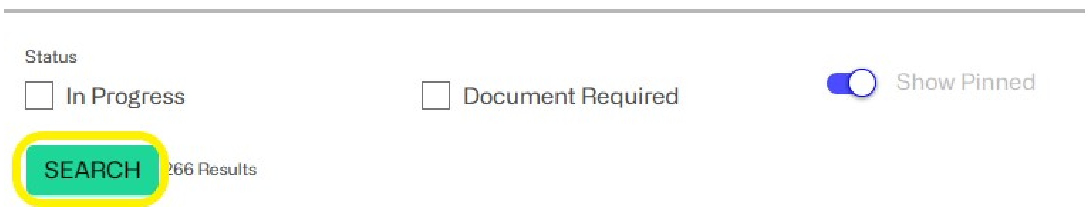
You can search by investor, product or process and use one of three date ranges (one week, one month or last three months), or a custom date range.




You can filter using multiple options within the product and notification type dropdowns:




Once you've selected the relevant filters, select search:



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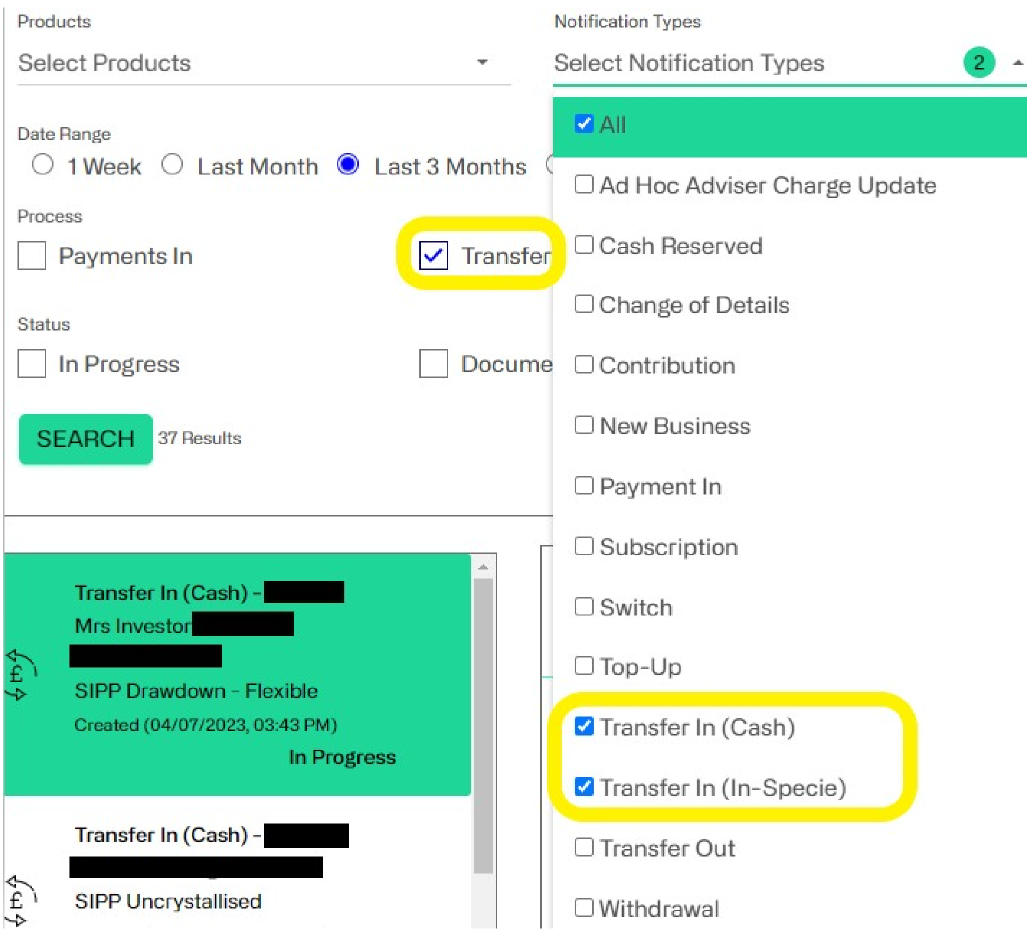
## Use quick picks to view the most requested updates

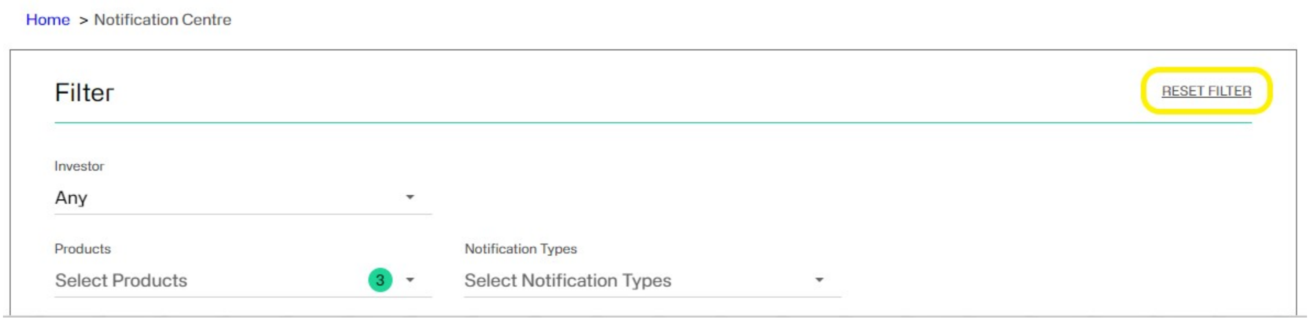
Quick picks allow you to view the most sought-after notifications.

Start by selecting the relevant process:


This will automatically filter the notification types to include any relevant items:




You can reset the filters using the 'Reset Filter' button.



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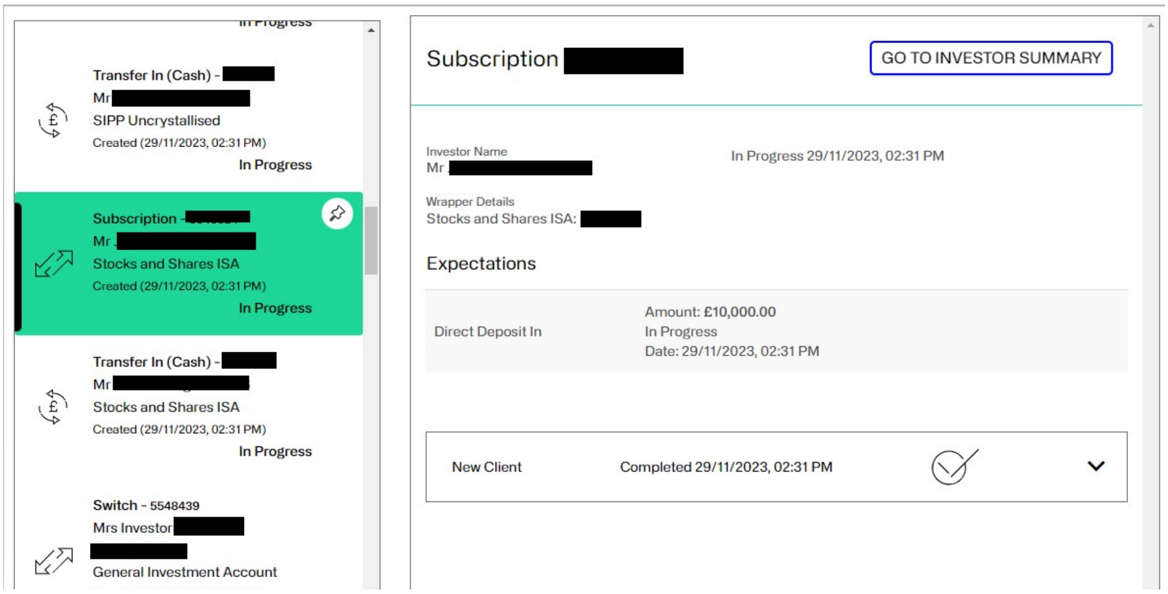
## Dual screen functionality

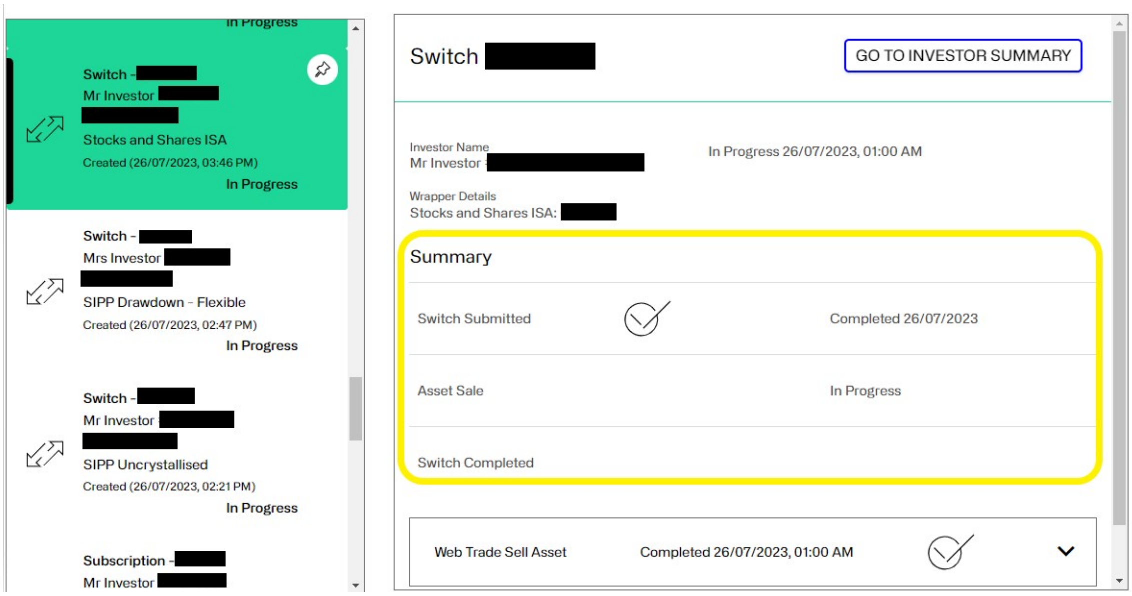
Dual screen view allows you to see notifications on the left-hand side of the screen and details of the selected notification on the right-hand side. You can view all the relevant information quickly and easily, without having to go into a separate page.




## Use our improved case tracker

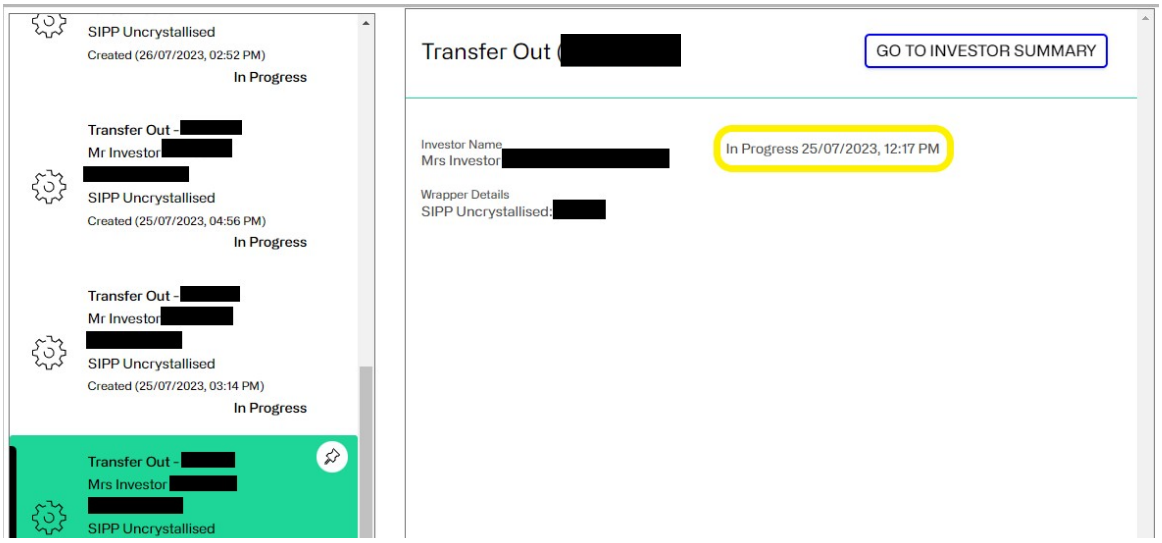
There is a different case tracker for each notification type. Previously in our Status Updates section, any switches showed as 'Completed' as soon as they were submitted.

We've improved this by keeping the status of the switch as 'In Progress' while trades are still pending, and adding details of the current switch status:

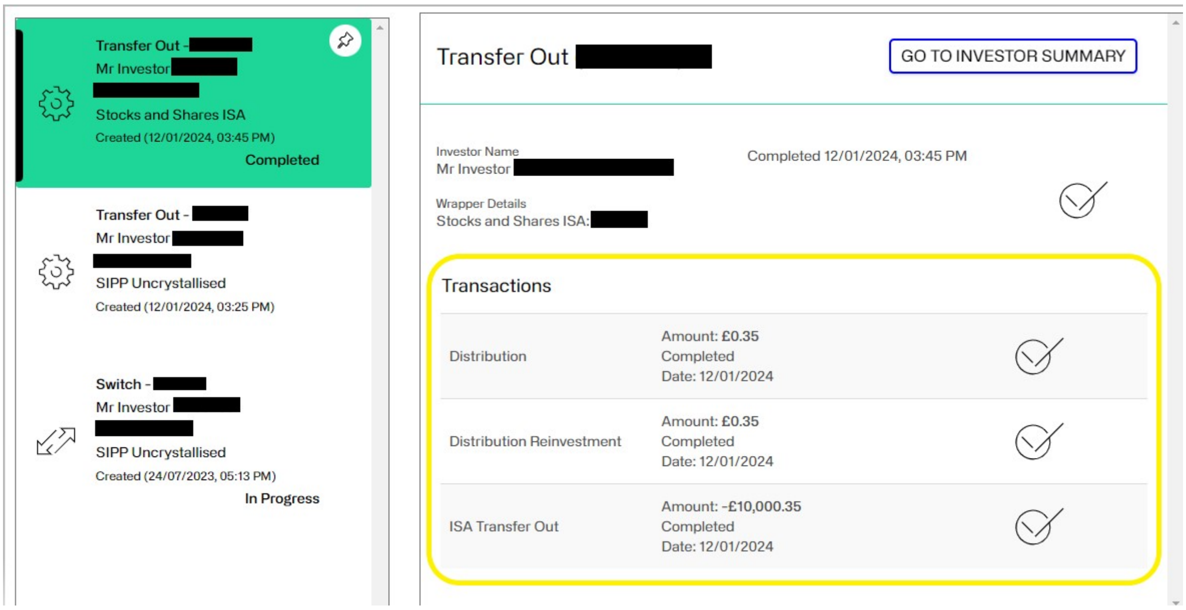


## Receive transfer out updates

You can now receive a notification when a transfer out request is received.
You can see if the transfer is in progress or completed.




Once the transfer has completed, any associated transactions will be displayed:



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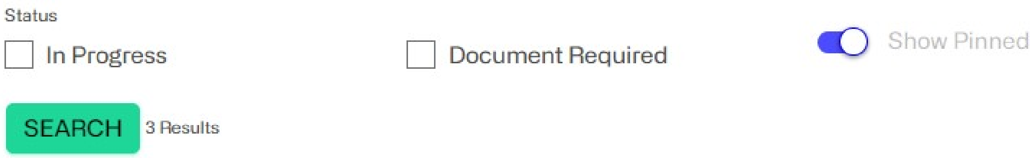
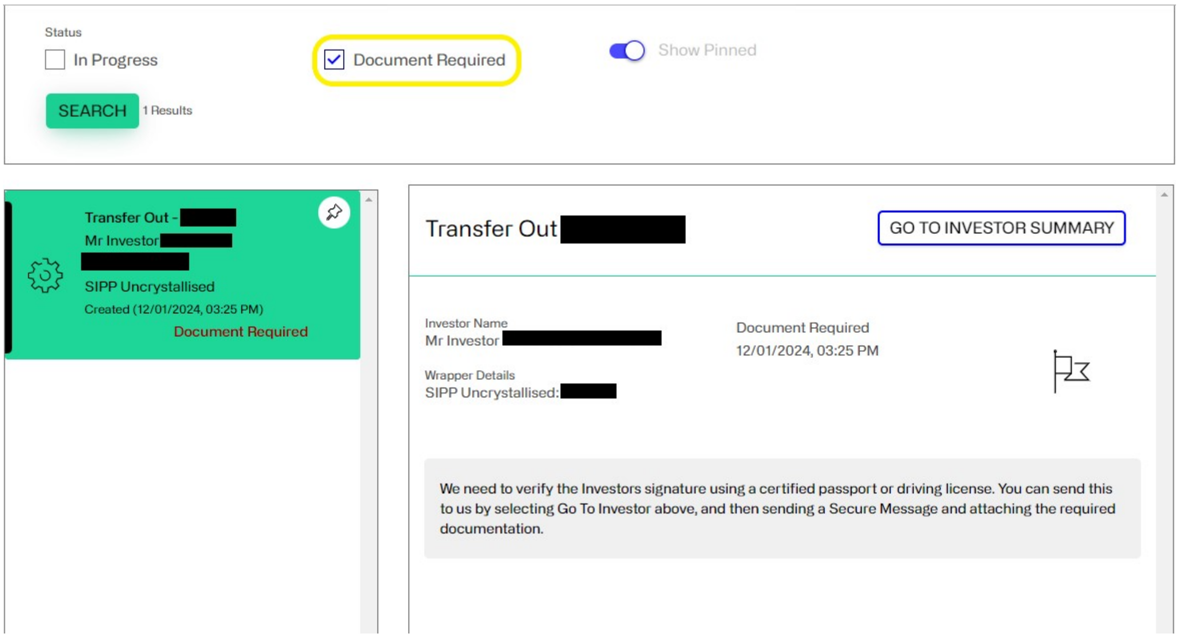
## Quickly respond to document required notifications

Under the status tab, filter by 'Document Required':




Select search to see any notifications that require documents:

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