

Wealthscape Notifications

Wealthscape

Description

Wealthscape Notifications is a toolbar within Wealthscape that consolidates a list of actionable items from multiple systems and perpetually presents it to users while they navigate the platform. This direct access and display reduces the need for users to check multiple source systems for these items and enables them to determine which items they need to address.

Functionality

Callout 1: A "To Do" list displays to users on the left hand navigation.

Callout 2: Users can flag items for quick access and deep link to items that are on their watch list.

Market Movers & Diaries Table:

Symbol	Last	Change	%Change	Volume
NM	3.99	+0.39	+10.83%	101,412
FSLY	23.76	+2.26	+10.51%	8,410,263
CVIA	3.45	+0.30	+9.52%	833,198
AFI	11.50	+0.98	+9.27%	109,407
CAE	25.84	+2.07	+8.71%	315,388
OBE	0.31	+0.02	+7.10%	1,010,550
UAA	23.27	+1.39	+6.35%	4,858,009

Market Diaries Summary:

- 2039 Advancing
- 2517 Declining
- 459 Unchanged

Volume Summary:

- 65243211 Advancing
- 62766615 Declining
- 126268849 Unchanged

* in thousands

- Displays a preset list of actionable transactions based on account access and entitlements. Actionable items include Service Messages, Service Requests, ICP transactions and UAO transactions.
- Provides near real-time updates when items become both actionable and no longer actionable.
- Directly links to the details of the actionable transaction for review or resolution, thereby eliminating multiple clicks.

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Additional Features

The screenshot shows the Wealthscape interface with the Notifications panel open. The panel includes a search bar, sorting options (Group By, Sort By, Display), and a list of notifications. A notification for 'NIGO' is selected, showing details like 'BMA-000176 | CLIENT' and a 'Review / Resolve' link. A 'Dismiss All' button is visible at the bottom of the panel. Red callout boxes with arrows point to these features, explaining their benefits.

By sitting on top of the main portal, reviewing action items does not take a user out of their current navigation.

High level details of the item allows a user to get a quick sense of the transaction and immediate next steps.

Deep linking to core applications in the context of the selected item eliminates the need to filter again to find the transaction.

Dismiss All function available to clear list with one click.

Refer to the [View and Organize Notifications](#)* training, which demonstrates how to view and organize items that appear on the Notification panel in Wealthscape.

**You must be logged into Wealthscape to view this training.*

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