Customer Education How to Resolve Scout Alerts



All documents sent through Levelset first go through our research team to make sure the information provided is the most up to date and correct and then to fill in any gaps left. Depending on how you've set up your scout settings (click here for more on that), you may be alerted about information found and then you'll have to log in to resolve that alert. Read on to learn how!

Step One: Check your notification center. If you have an alert from our Scout Research team, you'll see a little yellow number hovering over the bell icon of your notification center when you log in (you'll also be emailed about these alerts). Click the bell icon and then click the notification itself to be directed to the document that needs your attention.



Step Two: Find the documents that need alerts resolved. When you click the notification, it will bring you to the **"Research"** tab where you'll see the document(s) listed that have alerts. Hover over the document and click *View*.

Create	Document Alerts Project Suggestions Total (1) If Customize Columns) = Filters + [25 +]						
Dashboard	Status	Core Document Info	Outstanding Amount	Project Info	Customer Info	Alert Expiration Da	10
Actions @ Research	Expires in 4 days	Preliminary Notice Preliminary Notice #2705035	\$0.00	Browne Building [1234] 18 Fake Street Beverly Hills, CA 90210	Fake General Contractor 1234 Not Real Rd South Beverly Hills, California 90210	9/22/2019	⊘View

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Step Three: Look over the scout suggestions and decide which information you'd like to use. Once you're in the document details, you'll be able to see the scout suggestions, marked with a yellow "Suggestion Found" tag. Once you've reviewed what the scout has found versus what you entered, you'll have the option to "Use Scout's", "Use Yours", or, in some cases, "Use Both". Click whichever button you decide to resolve the alert. You'll also be able to leave comments, questions, or more information for the Scout Team member on the right hand side of the page under "Comments".

•	Document Alerts Project Sugge	stions	Browne Building (1234) Alert Pending (2705035) 18 Fake Street Beverly Hills, CA 90210				
Create معر Dashboard	Total (1) Status Core Document Info Status Preliminary Notice Preliminary Notice #2705035		Preliminary Notice Details Comments				
Actions @ Research			Hannah Aufdembrink - Scout Researcher September 18 at 10:07am Here are the research suggestions I have found for this order. Property Owner / Public Entity Suggestion Found	Send			
Companies			Scout Found You Entered Property Owner Not provided 18 Fake Street Not provided Beverly Hills, California 90245 We will have a researcher workit document shortly.	ing on your			
Projects			Use Scout's Use Yours Use Both Post your questions and add information for them he	litional re.			

Once you decide which information to use and then click the corresponding button, the alert is resolved and the tag will switch to a green "**Resolved**" tag. Your document is now processed and ready to be created and sent! You can track the status of your document from the "**Documents**" tab.

M LEV	/ELSET Research		← Back				View All I	Document Detail:
Create	Document Alerts Total (0)	Project Suggestions	Document: Preliminary Notice M Notice Sent [2705035]	Project: Browne Building [1234] 18 Fake Avenue Beverly Hills, CA 90212		K		
ی Actions	Status	Core Document Info	Preliminary Notice Details			Comments		
Research			Property Owner / Public Entity	Property Owner 18 Fake Street Beverly Hills, California 90210	Resolved View Details	With Scout	With Recipients	Send
Invoices			Project Address	18 Fake Avenue Beverly Hills, Los Angeles County California 90212	Resolved View Details			A
Projects			General Contractor	Fake General Contractor 1234 Not Real Rd South. Beverly Hills, California 90210	Confirmed			

Last Updated: September 23rd, 2019