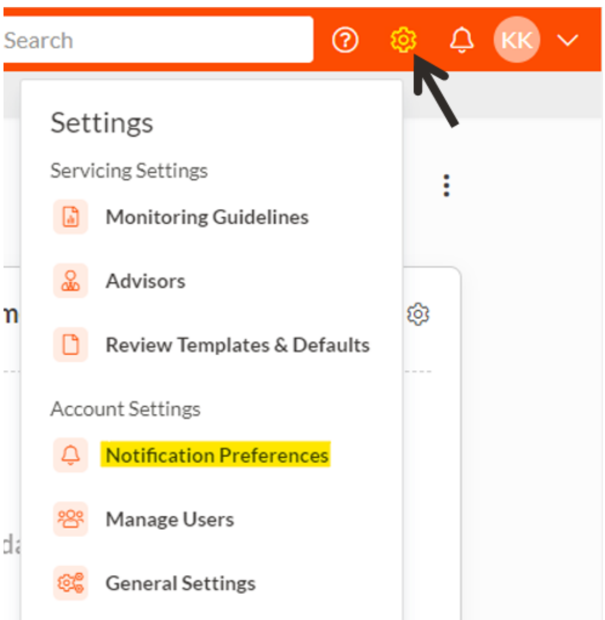
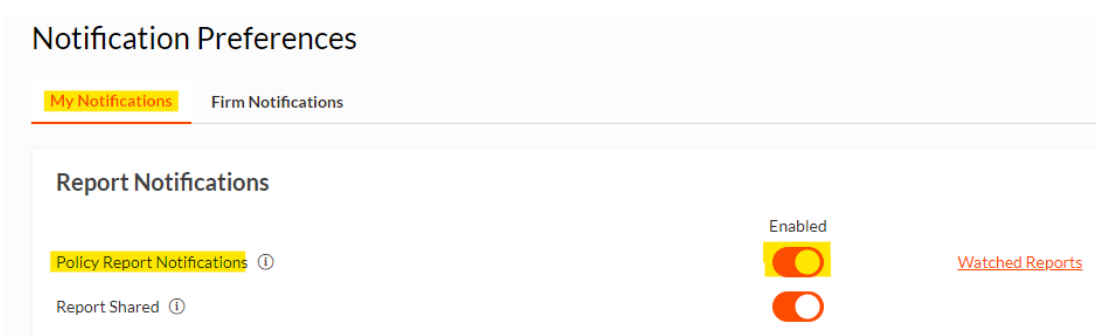
How to Setup User Notifications

Configure alerts for policy events you want to keep an eye on. Notifications are based on policy reports - we have some great default reports, and you can build your own. Read more below on how to start "watching reports".

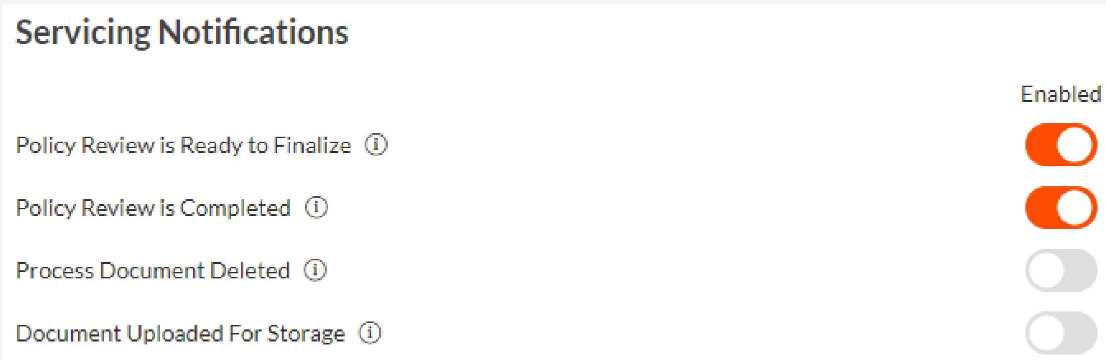
1. First navigate to **Settings** > **Notification Preferences**



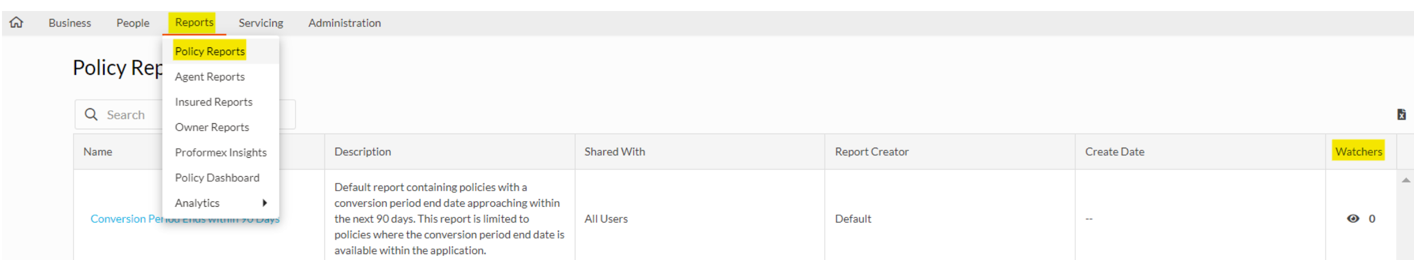
2. Ensure Firm Notifications are enabled, if you're not sure ask your Firm Admin or Customer Success Manager. Under My Notifications, **toggle on Policy Report Notifications**



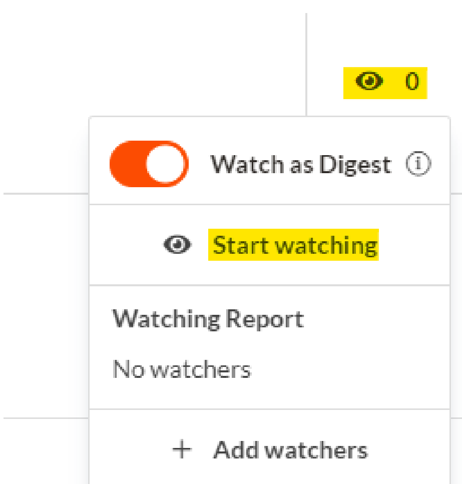
While you're at it, you can also enable Servicing Notification, if you have the Document Processing add-on. Toggle on the alerts as desired.



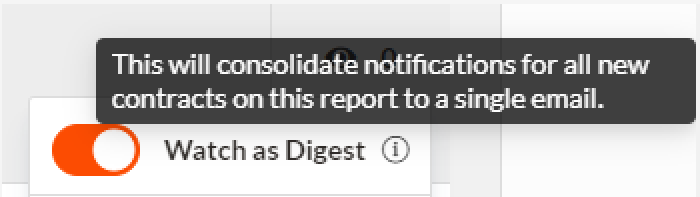
3. Navigate to **Reports** > **Policy Reports** where you will now see a Watchers column.



4. Click the **eye icon** next to any report to be notified when a new policy meets the criteria of that report. Click **Start watching**



The digest format is enabled by default. If you'd like to receive individual email notifications rather than the consolidated digest, toggle off "Watch as Digest"



For additional questions or to learn more on how to create new policy reports, please refer to our [Help Center] or reach out to your Customer Success Manager