## **PR**<sup>O</sup>FORMEX

## 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** 

Notification Preferences		
My Notifications Firm Notifications		
Report Notifications	Enabled	
Policy Report Notifications ①		Watched Reports
Report Shared ①		

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.

## **Servicing Notifications**

Policy Review is Ready to Finalize (i) Policy Review is Completed (i)

Process Document Deleted (i)

Document Uploaded For Storage (i)

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

ය Bus	siness People	Reports Servicing A	dministration					
		Policy Reports						
Policy R		Agent Reports						
	O Search	Insured Reports						6
	Search	Owner Reports						
	Name	Proformex Insights	Description	Shared With	Report Creator	Create Date	Watchers	
	Conversion P	Policy Dashboard Analytics	Default report containing policies with a conversion period end date approaching within the next 90 days. This report is limited to policies where the conversion period end date is available within the application.	All Users	Default	-	<b>@</b> 0	•

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** 

<mark>0</mark> 0
Watch as Digest (i)
Start watching
Watching Report No watchers
+ Add watchers

Enabled

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"

This will consolidate notifications for all new contracts on this report to a single email. Watch as Digest (i)

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