Agent Portal Notifications Quick Card

Agent Portal Notification Functionality

- Current Alerts Functionality
- Notification Alert Bell
- Notification Slide Out Tray
- Notification Center

- Notification Preferences
- Notification Subscription Cards
- Agent Profiles

Alerts

Currently the Alerts link displays in the header of your Agent Portal screens. It will display the number of Alerts that are active for your Agent Portal account.
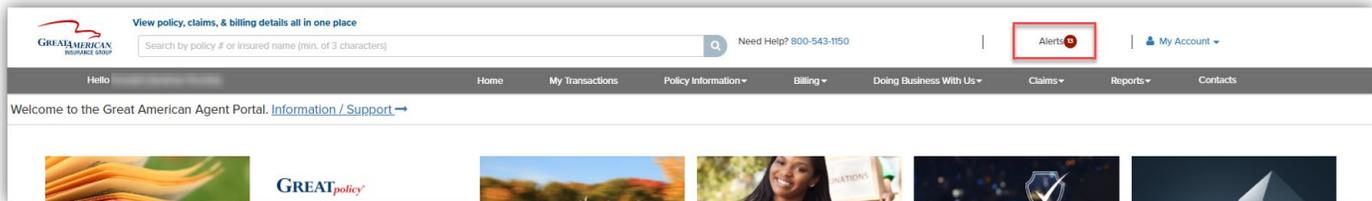
The Notification Alert Bell will replace the Alerts link in the header of your Agent Portal screens. The Bell will only display if there is an active Alert or Notification for your Agent Portal account. The Bell will display the total number of currently active Alerts and Notifications within the past 14 days.
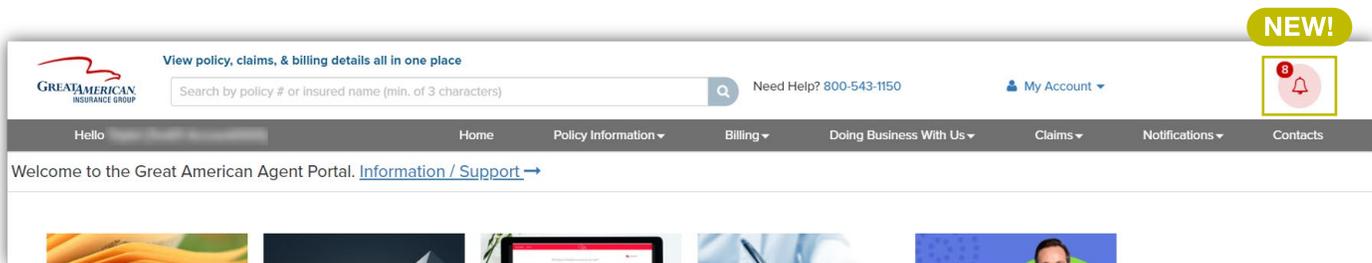
Notification Slide Out Tray

When the Notification Alert Bell is selected a Notification Slide Out Tray will descend from the top right of your screen. The Notification Slide out Tray will contain headers for Alerts and Policy Notifications. The counts next to the headers depict the number of active Alerts and Notifications within the tray. The Agent can select the headers to expand the display. The Notification header will be sorted by date to which you can drill down further.

Within the Notification Tray there also are links to the Notification Center, Alerts Notification Center, and the Recent Policy Documents Page. Similar to the Recent Policy Documents page, the Notification Tray will display the past 14 days of notifications. Within each Policy Notification card will be a link to the Policy Document, Policy Name, Policy Number, and Process Date.
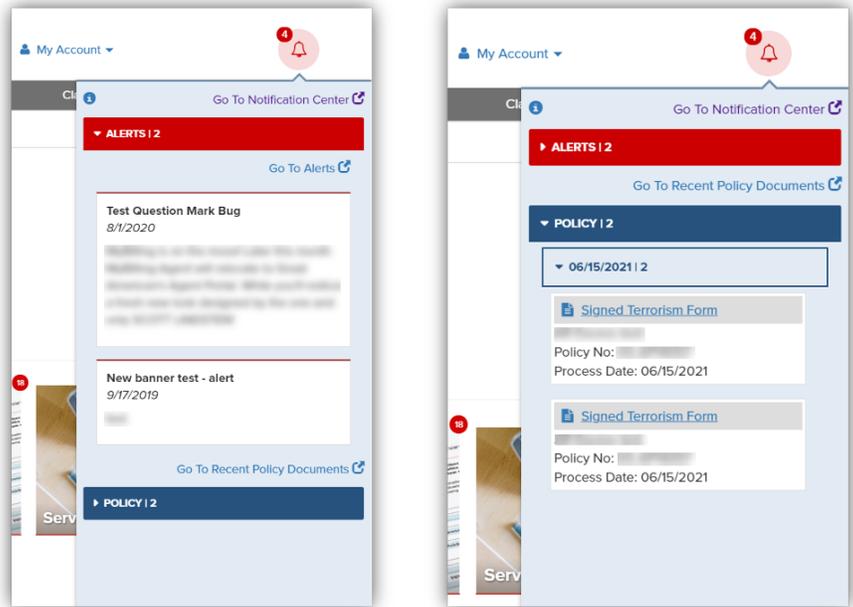
Notification Center

The Notification Center page displays the Agents Active Alerts and Policy Notifications. The Agent can select the headers to expand the displays and select the Notification document links. The Notification Center will store Policy Notifications for 90 days. There is also a link to Manage your Notification Preferences.
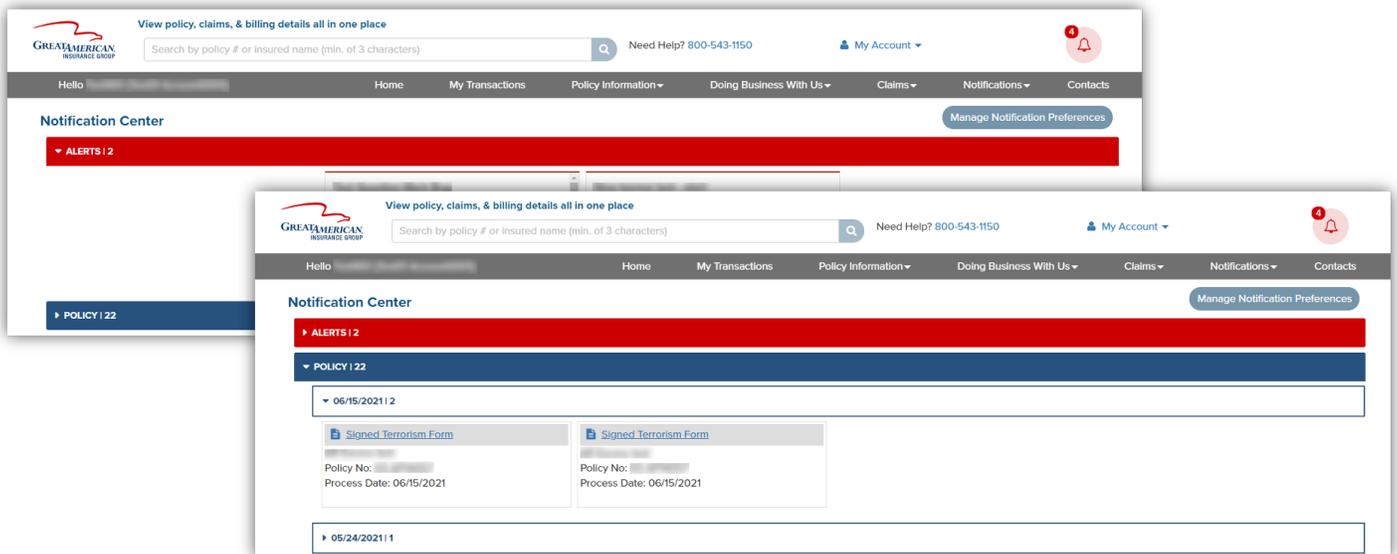
Notification Preferences

The Notification Preferences Page allows the agent to create new Policy Notifications. Select the "New Subscription" button to create a new Policy Subscription. Select the check box if you would like the Policy Notifications emailed to your Agent Portal login email address. Select the "Subscribe" button to save the Notification Subscription.
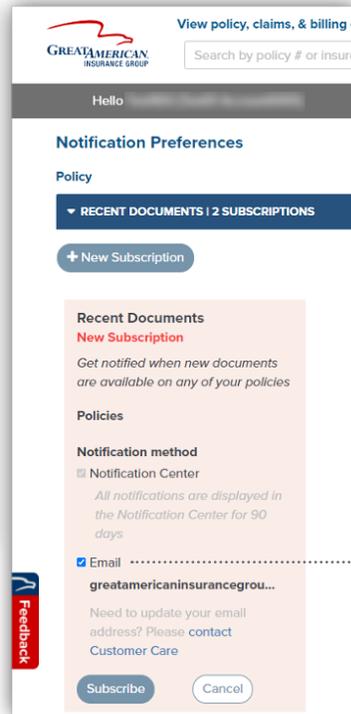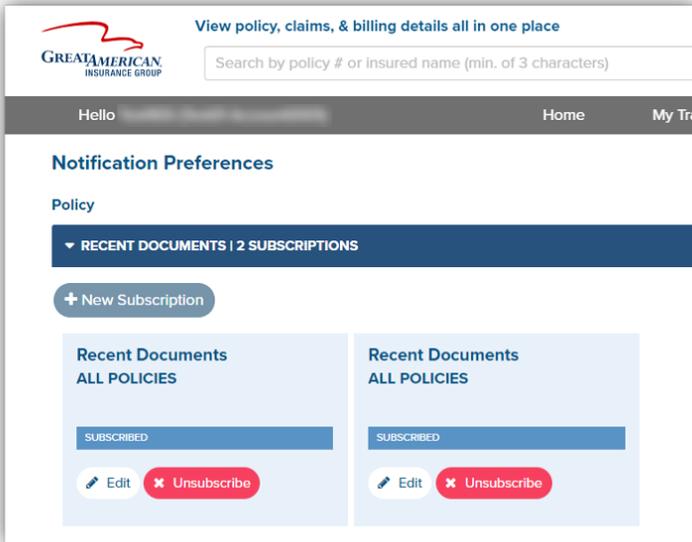
Note: If email is selected you will be prompted to review the "Terms and Conditions" for the first subscription.

Saved Subscriptions will display as blue subscriptions cards.

Agent Profile

Agents can access their "Profile" information from the "My Account" dropdown. From the Profile section the Agent can navigate to the Notification Center and Notification Preferences pages.