Automated Notifications in Producer Manager

The **Notifications** service in Producer Manager will automatically send scheduled notification emails to your firms, individual licensees, and/or staff members regarding upcoming license renewals and license expiration dates.

Setting up Notifications

To open the **Notifications** page, from the **Administration** menu, select **Notifications**. The **Notifications** page will open.

You may take the following actions on this page:

- Click the **Edit** button (✎) to open the **Notification Configuration** page, where you can design and schedule the notification.

- Click the **Enable** button (●) to activate a scheduled notification

- Click the **Disable** button (●) to inactivate a scheduled notification

- **Return**: Click to re-open the Producer Manager main page.

Note: The Enable (●) and Disable (●) buttons will not display if no schedules are set up.

Configuring the Notifications

To open the **Notification Configuration** page, click the (✎) button on the **Notifications** page that corresponds to the notification type you wish to work with.

The **Notification Configuration** page is set up in a wizard style and consists of the following sections:

- Notification Details
- Scheduled Notifications

Notification Details

Use the **Notification Details** section to design the notification email template. Information you enter in this section will apply to all scheduled notifications for the type you selected on the **Notifications** page.

Enter a valid email address in the **From Email Address** field. This email address will populate the "From" field in the header of all email notifications that are based on that template.

Producer Manager has provided some very basic general content that will be included in all emails sent based on that template, but you may wish to add your own text to all emails. Do this in the **General Instructions** section of the page. Any text you add in this section will immediately appear in the **Email Content** section.

You may also wish to include specific instructions for producers in certain states. This can be done using the **State Specific Instructions** section. The custom text will automatically be included in every scheduled notification email of the selected notification type that is concerned with the configured states.

- Select from the **<Add State>** dropdown menu the name of the state to display a text box in which you can add new state-specific text.

- Click the **Add** button to save the state-specific text, or click the **Cancel** button to abort the operation.

- To modify or clear existing state-specific text, click the **Edit** button (✎) corresponding to a specific state, and then change or remove the text in the text box.

- To remove a state's specific content from a scheduled notification, click the **Delete** button (✖).

Click the **Save and Continue** button to save all edits on the page and open the **Scheduled Notifications** page of the **Notification Configuration** wizard.

Scheduled Notifications

All configured schedules (if any) that can be used to send notifications are listed on the **Scheduled Notifications** page.

Edit an existing notification schedule by clicking the **Edit** button (✎), and delete an existing notification schedule by clicking the **Delete** button (✖).

Click the **Add new Scheduled Notification** link to create a new schedule by which the notification can be sent. Producer Manager will not send automated notification emails until at least one scheduled notification is configured. This is a three step process:

1. **Who should be considered?**: When reviewing an existing scheduled notification, displays currently

selected notification group criteria. When updating an existing scheduled notification or adding a new scheduled notification, allows you to define producers to be eligible to receive the scheduled notification. Click the radio button that corresponds to an existing group of producers, or click the **New Custom Producer Group** radio button to define a new custom group. Configuration options include the following:

- o **Producer Type**: This field is disabled, as it defaults to the type you chose on the Notifications page – Firm or Individual.

- o **Producer Status**: Click to checkmark the checkbox, and then click to choose the record status of a producer, either "Active," "Inactive," or "Pending." If desired, press the CTRL key and click to select multiple statuses.

- o **Maximum number of days that the Producer Status is unchanged (1-365)**: Click to checkmark the checkbox, and then enter a whole number representing the maximum number of elapsed days since a change in a producer's record status in order to be eligible to receive the scheduled notification.

- o **Producers that hold an active license**: Click to checkmark the checkbox to include a producer with a license status of active as being eligible to receive the scheduled notification.

- o **Business Unit**: Click to checkmark the checkbox, and then click to select a business unit to which a producer must belong in order to be eligible to receive the scheduled notification. Press the CTRL key and click to select multiple business units.

2. **When should notifications be sent?**: When reviewing an existing scheduled notification, displays currently selected notification timing options. When updating an existing scheduled notification or adding a new scheduled notification, allows you to set timing options for delivering the scheduled notification to defined producers. Configuration options include the following:

- o **How many days after a license's expiration date should the producer be notified?**: Expired license notification type only. Enter a number representing the number of days after a producer's license expiration date that Producer Manager will send the producer the scheduled notification.

- o **How many days prior to a license's expiration date should the producer be notified?**: Pending license expiration notification type only. Enter a number representing the days prior to a producer's license expiration date that Producer Manager will send the producer the

scheduled notification. Then select one timing option condition, as follows:

- ■ **Always send this notification by this schedule**: Click to select the radio button to make the selected timing option unconditional.

- ■ **Only send this notification by this schedule if the state has also sent renewal paperwork**: Click to select the radio button to make the selected timing option depend on whether a state has generally issued license renewal paperwork.

- ■ **Only send this notification by this schedule if the state has opened its renewal period**: Click to select the radio button to make the selected timing option depend on whether a state's license renewal period is ongoing.

> **Note**: Producer Manager will not stop notifications for states that do not issue renewal information.

3. **Which additional recipients should be notified?**: The Send to Producer checkbox, when checked, will allow email notifications to be sent to the producer. If left unchecked, Producer Manager will only send notifications to the staff members identified.

> **Note**: When configuring a notification for a firm, the Send to Producer checkbox does not appear. In this case, you may only send the notification to Producer Manager users.

Select the names of one or multiple Producer Manager users from a list to be sent the scheduled notification emails. Press the CTRL key and click to select multiple users.

Viewing the Emails

Once sent, actual text of the emails and the date sent will be recorded on the producer record in the **Emails** section of the page.

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