

Setting up Email Notifications in Message Center

Overview

Have you ever wished you could get an automatic notification of an approval or denial response from a state regarding a license application or appointment transaction? With Vertafore Sircon's **Message Center**, you can do just that.

Note: Only users with administrative privileges can open the **Message Center** page.

Getting Started

- To open the **Message Center** page if you are using Producer Manager, go to the **Express Services** menu, and then click **Administration**.
To open the **Message Center** page if you are using Compliance Express, click the **Administration** link in the **Online Services** menu on the left of the page. The **Administration** menu page will open.
- Click the **Message Center** link.

Note: If you are using Producer Manager, the link will be called **Producer Manager Message Center**. If you are using Compliance Express, the link will be called **Compliance Express Message Center**.

The **Message Center** page will open.

Compliance Express Message Center

Manage your e-mail notifications by setting your preferred options below.

Current Email Notifications

Delete	Service Type	Notification Type	Response Type	
<input type="checkbox"/>	Appointment Processing	Additional State Response	Approved	Edit
<input type="checkbox"/>	Appointment Processing	Additional State Response	Rejected	Edit
<input type="checkbox"/>	Appointment Processing	Form Generated - Subscriber	Approved	Edit
<input type="checkbox"/>	Appointment Processing	State Response	Approved	Edit
<input type="checkbox"/>	Appointment Processing	State Response	Rejected	Edit
<input type="checkbox"/>	License Application	Additional State Response	Approved	Edit
<input type="checkbox"/>	License Application	Additional State Response	Status Update	Edit
<input type="checkbox"/>	License Application	Form Generated - Producer	Approved	Edit
<input type="checkbox"/>	License Application	Form Generated - Subscriber	Approved	Edit
<input type="checkbox"/>	License Application	State Response	Rejected	Edit

Add/Update Email Notifications

Service Type: * Required

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Using the Message Center

Current Email Notifications, if any, are displayed at the top of the page. In the **Add/Update Email Notifications** section you can begin to set up new notifications.

- From the **Service Type** dropdown menu, select, either Appointment Processing or License Application, depending on the type of notifications you'd like the system to send. Once you've made your selection, the **Email Notification Type** dropdown menu will appear.

Add/Update Email Notifications

Service Type: Appointment Processing * Required

Email Notification Type: * Required

Additional State Response
Form Generated - Subscriber
State Response

- From the **Email Notification Type** dropdown menu, select an event that will trigger the automated notification. Choose "State Response," or "Additional State Response."

Note: If it appears in your menu, do not choose "Form Generated – Subscriber." This service is no longer supported.

State Response is the initial response of "approved" or "denied" from the state regarding your appointment or license application transaction.

Additional State Response: This is a response the state might send *after* the transaction has been initially approved or denied. This is a rare occurrence, but it is a possibility and Vertafore recommends setting up email notifications for this response type.

- Once you've chosen an **Email Notification Type**, the rest of the page will display. Choose a response from the **Response Type** dropdown menu, either Approved or Rejected.
- In the next section you have three choices:
 - "Send appointment process notifications to the subscriber rep who submits the request."

By choosing this option, only the user who submits the transaction will receive an email update on its status. This is a useful option to choose if all users are responsible for following up on their own submissions.

- “Send appointment process notifications to the subscriber rep who submits the request and a copy to a specified e-mail address.”

By choosing this option the user who submits the transaction *and* someone you identify will both be notified by email of any status changes to the transaction. Perhaps you would like the user and an administrator, or the user and a group email box to receive the update? You can do so by entering an email address (only one is allowed) in the **E-mail** box at the bottom of the section.

- “Send appointment process notifications to a specified e-mail address.”

By choosing this option the user will *not* be notified of any update to their submissions, and instead notifications will only go to the email address specified in the **E-mail** field at the bottom of the section. You may only enter one email address in the field, but this can be a useful option especially for clients who have an email address set up to go to an in-box that multiple people have access to; if someone is out of the office others can follow up.

Note: In order to receive automated notifications, users must have a valid email address associated with their user accounts. To verify users' email addresses and to add email addresses if necessary, use the **Maintain Subscriber Representative** page.

Configure the Email

In the next section of the page you will edit the text of the email to reflect information you wish to see when you receive the notification.

1. In the **Subject** field, edit the email subject line.
2. In the **Message** box, enter modify or delete text and/or tokens (field codes) that will appear in the email body.
3. In the **From Email Address** field, enter a valid email address to be included in the “From” or “Reply To” line of email message.
4. When you are finished, click the **Save** button. The automated notification will be saved to the system and display in the **Current Email Notifications** section of the **Message Center** page.

Using Format Tokens in your Email

Add "format tokens" to your email message to automatically insert customized details into the email. It

might help to think of format tokens as form letter merge fields.

For example, you want the subject of an email regarding a license application to be:

“License Application Status for [producer’s name] from [state]”

You would enter the following:

“License Application Status for <NAME> from <ST_CD>”

By setting up your email message with tokens, your email will give you specific information regarding the transaction, so if there is anything you need to follow-up on you can easily find the information.

Sircon offers a list of tokens that will work in your message. To view this list on the page while you are setting up your email, click the **Click here for more format information** link.

This will open a separate pop-up window with a list of all possible tokens you can use. You can even copy and paste the tokens from the pop-up window into your email message.

When inserting format tokens into your email, be sure to include the token text as well the brackets at the beginning and end. All tokens must have the < bracket at the beginning and the > bracket at the end.

Note: For <TIN>, if it is the individual's SSN, only the last 4 digits will be displayed such as XXX-XX-1234.

Need More?

If you need further assistance with Vertafore Sircon products or services, contact your assigned account representative, send an email to plmsupport@vertafore.com, or open a case in the Self-Service Portal.