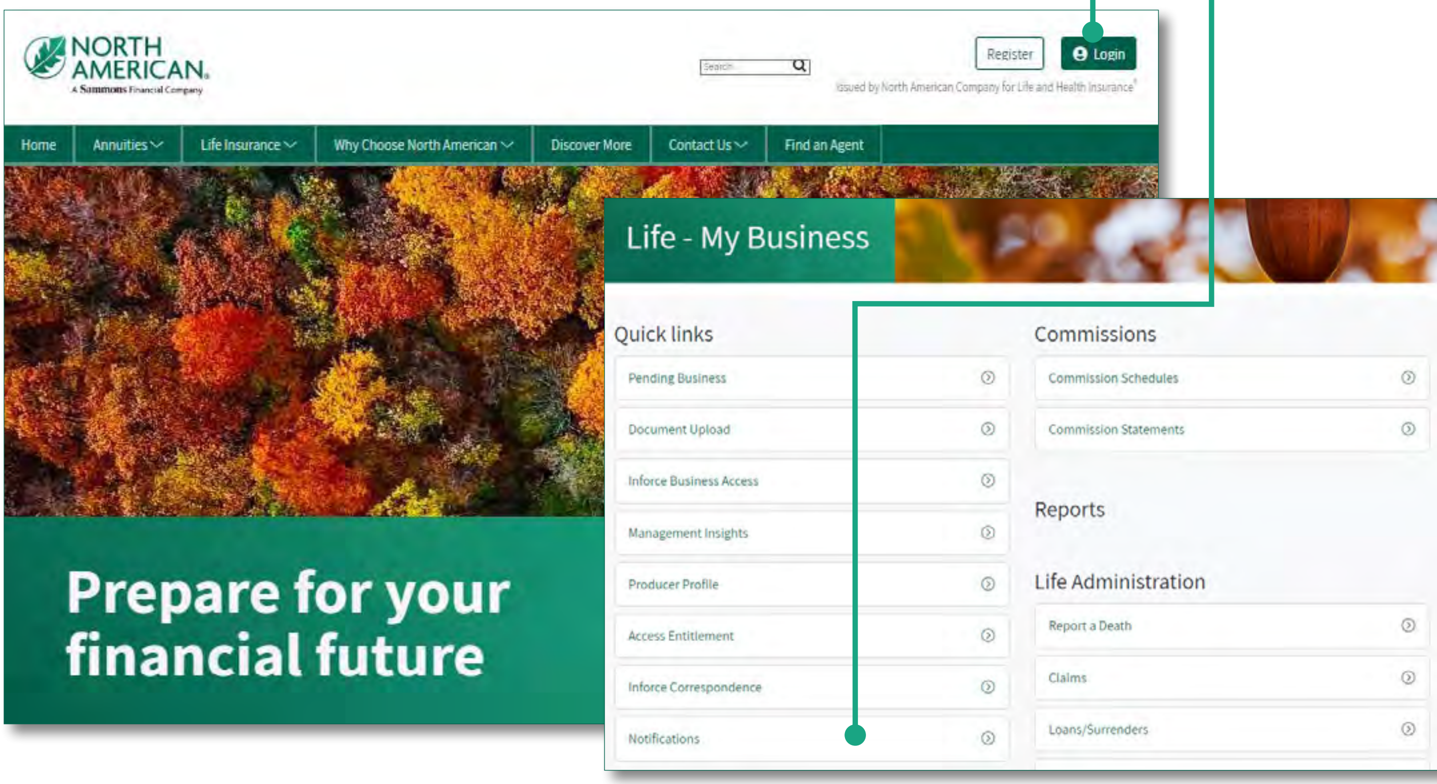
Life

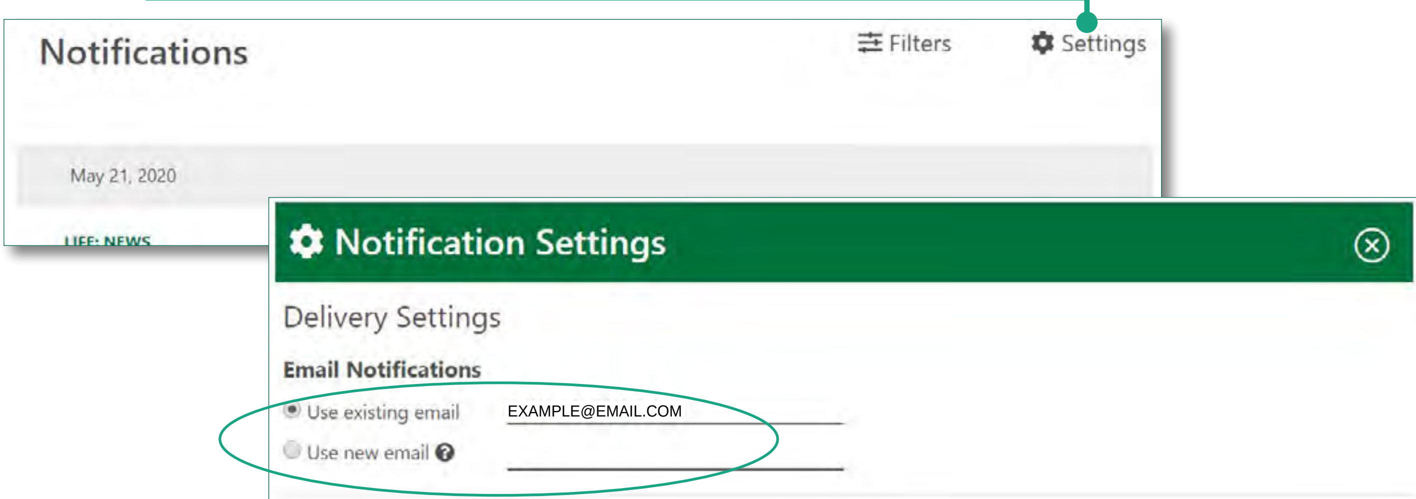
North American Company for Life and Health Insurance®

Setting up for agent notifications

After **logging into** the website, select **notifications** under My Business.



Under **Settings**, select the **email** address where you would like to receive the notification.

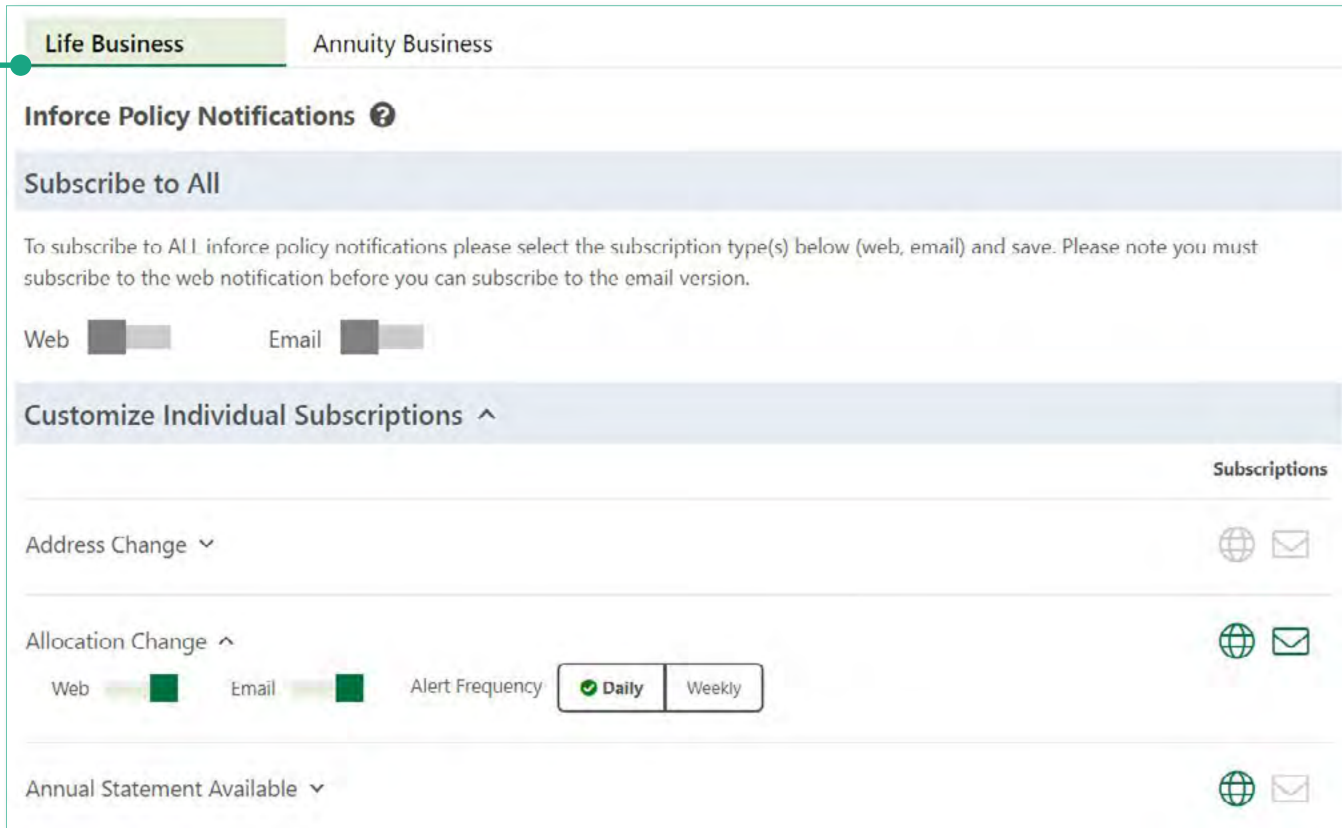


Select preferred notifications

On this same page below subscription settings, select what **notifications you want to receive**. This needs to be done for Life and Annuity.

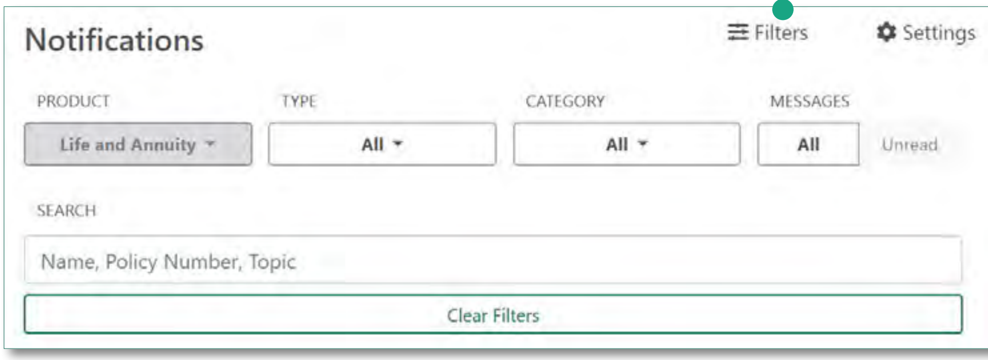
Once all wanted notifications have been selected, select **save changes**.

- If web alerts are selected, the notification will be on the website under **Notifications** only.
- If email alerts are selected, an email will be sent to the address provided under delivery settings. (Web alerts will also need to be selected).
- The **Alert Frequency** and **Threshold** amount can be filled out to your specifications.

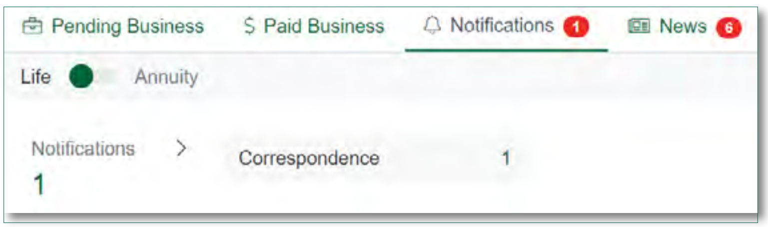


Once notifications are set up, they will be viewable under **Notifications**. Items can be searched by policy/contract number and date range under **filters**.

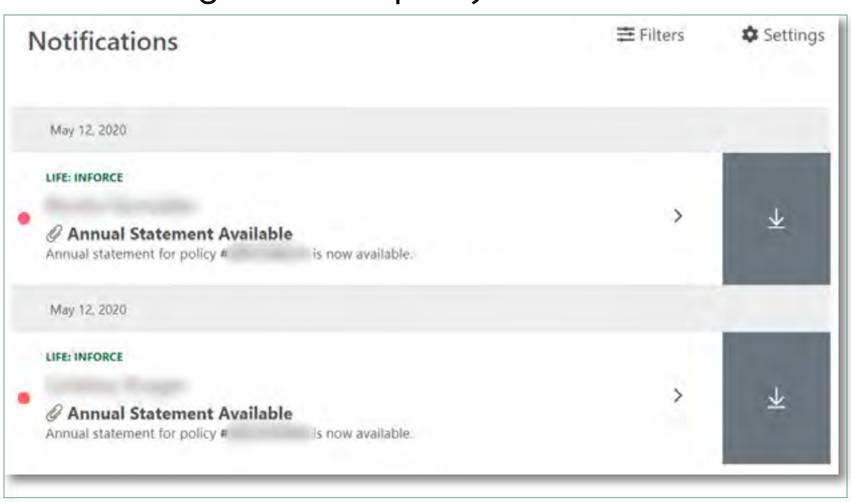
- There is also the ability to select the category by clicking on **filters**. There is a different tab for notifications based on Life or Annuity.



- A summary of all recent notifications is also available on the agent homepage viewable by category. The number of new unread notifications is displayed in red on the notifications tab.



- These items will be on the website for 30 days. For certain items such as annual statements, they will show under notifications for 30 days and then be available indefinitely when searching under the policy number.



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