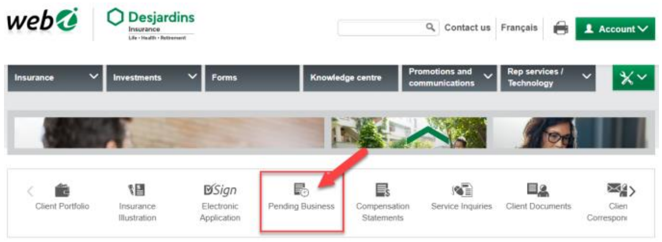
Define communication preferences

To facilitate follow-up, the Pending Business and Client Documents applications generate different types of notifications. The Communication Preferences tool allows you to define the recipient and the type of notification sent.

1

Open Webi, then go to **Pending Business**.

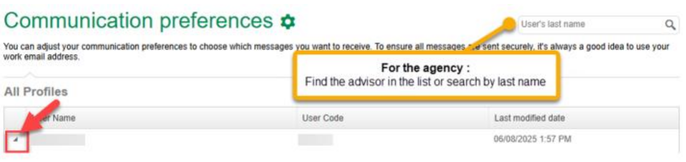


2

Click on **Communication Preferences**.

3

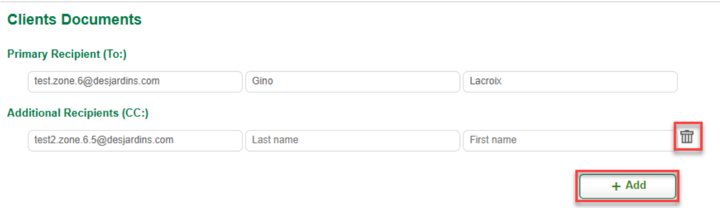
Click the **arrow to open** the representative's profile.



4

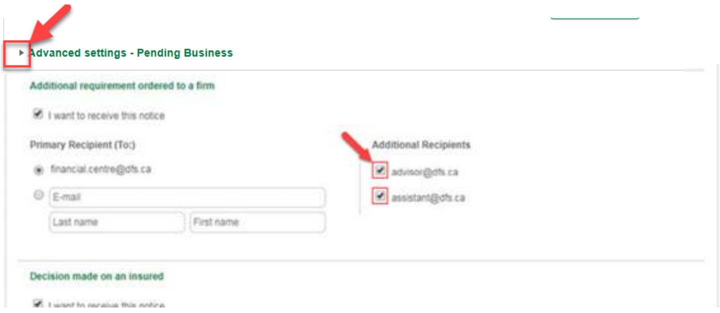
In the Client Documents section, **add or remove** the desired email addresses for notifications related to client communications. Repeat this step for notifications related to pending business.

Refer to your agency's administrative staff to learn about their service offering, if needed.



5

In Advanced Settings – Pending Business, select your communication preferences for each notification. **Check** the box to receive notifications, then **repeat** for each one.



6

Click **Save**.

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Define communication preferences

To help track pending cases, the Pending Business application generates different types of notifications. The Communication Preferences tool lets you set your notification preferences.

List of notices types

Notice	Mandatory or optional	Sector	Details
Requirement cancelled	Optional	• Administration • Underwriting	When an in-progress requirement is cancelled.
Final notice	Mandatory	• Administration	When a requirement with an intervention needed is created and a response has not been received by the deadline, a Final notice is sent to indicate the file's outcome (e.g., "We will be closing the file, We will be issuing the contract with a notice of modification", etc.).
Decision made on an insured	Optional	• Underwriting	When a decision is made, a notice is sent for each insured.
Requirement with an intervention needed	Mandatory	• Administration • Underwriting	When you need to do something for a requirement.
Special note	Mandatory	• Administration • Underwriting	When a note for you is added to the Special Notes tab.
Reminders for requirements with an intervention needed	Optional	• Administration • Underwriting	When a requirement with an intervention needed reaches its reminder date.
Response to a requirement	Optional	• Administration • Underwriting	When a response to a requirement is submitted, each person listed in the Communication Preferences receives a notice indicating who processed the requirement.