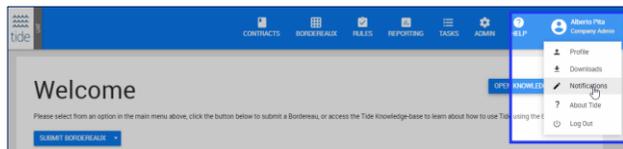# Setting up notifications in Tide

This quick reference guide runs through how to set up and manage notifications in Tide to alert you of the status of bordereau.
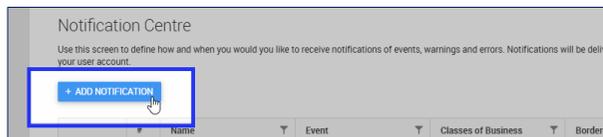
Notification Centre

Add Notification

You can set up email notifications in Tide to alert you of the status of bordereaux. When triggered, notifications will be sent to the email address associated to your Tide account. Multiple notifications can be set up and managed to cater for your individual needs, but note that notifications are personalised and cannot be applied across a company or a team.

1. Click the profile icon ( ) in the top-right corner of the screen and select the **Notifications** option:

2. The *Notification Centre* screen is displayed, as shown below. Click + ADD NOTIFICATION :

3. Define the triggers and conditions for the notification(s):
   - **Name:** Enter a descriptive name for the notification(s) that you are setting up.
   - **Event:** Select the event that will trigger the notification – refer to the adjacent note on *Event Triggers*.
   - **Class of Business:** Select the class(es) of business to which the trigger event will be applied.
   - **Bordereau Type:** Select the type(s) of bordereaux to which the trigger event(s) will be applied (*Risk*, *Risk and Premium*, *Premium*, *Claim*)
   - **Frequency:** Select how often the notification(s) will be sent – options include *daily*, *weekly* and *real-time*.
   - **Association Condition:** Select the condition under which the notification(s) will be sent:
     - **All**: All contracts/reporting channels you are associated to.
     - **Leader**: Only contracts where you are the leader
     - **Follower**: Only contracts where you are a follower.
     - **Contract Administrator**: Only contracts where you are the contract administrator.

Figure 1: *Notification Centre – Add Notification*
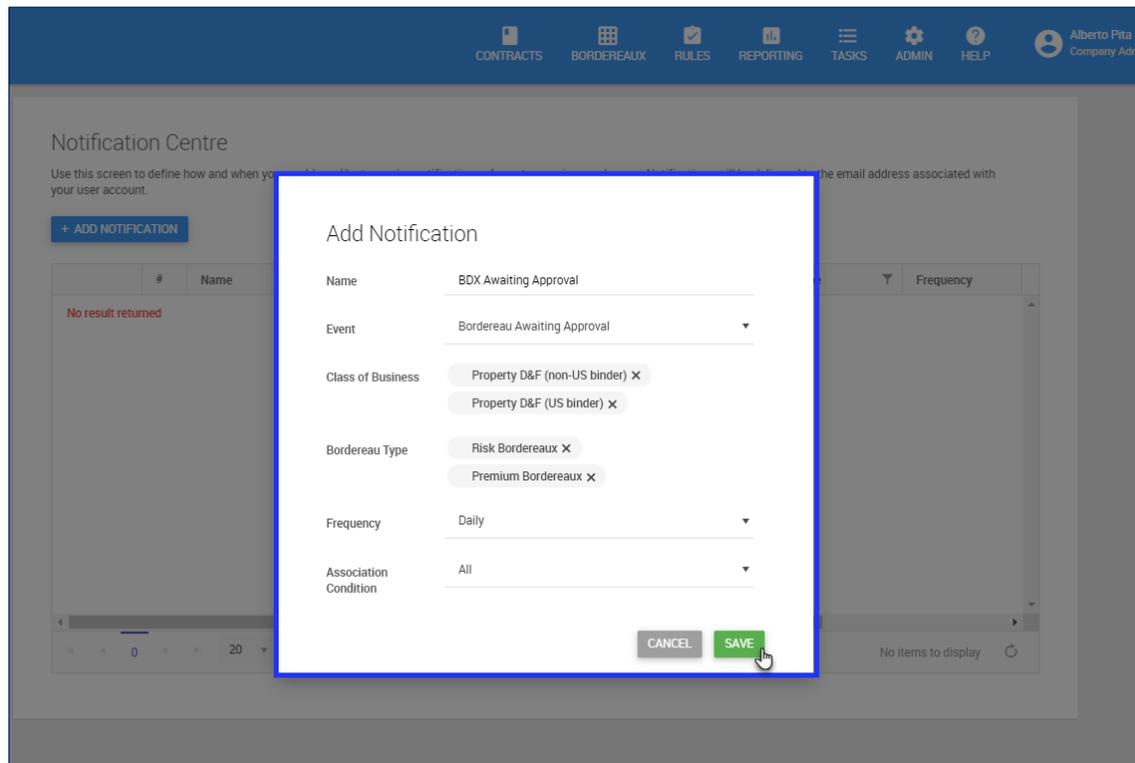
Event Triggers	
Bordereau Due	Triggered when a bordereau has reached a status of due (as defined in Reporting Channels)
Bordereau Overdue	Triggered when a bordereau has reached a status of overdue (as defined in Reporting Channels)
Bordereau Approved	Triggered when a bordereau has been approved
Bordereau Uploaded	Triggered when a bordereau has been uploaded to the contract
Bordereau Awaiting Approval	Triggered when a bordereau has gone through *Transformation* and *Assignment* and awaiting approval
Bordereau Rejected	Triggered when a bordereau has been rejected at the approval stage
Bordereau Review Errors	Triggered when Tide identifies errors in the bordereau during *Transformation*
Bordereau for Assignment	Triggered when a bordereau has gone through *Transformation* and is ready for assignment
Bordereau Unapproved	Triggered when a bordereau has been *unapproved* at the approval stage
Added to Contract	Triggered when your company has been added to a contract
Contract Update	Triggered when a contract that your company is associated to has been updated

Notification Centre (continued)

4. Click **SAVE** once all triggers and conditions have been defined:

5. The notification will now appear in the *Notifications Centre* – the example below shows two notifications that have been set up for two different classes of business:

- To add another notification, follow the previous steps outlined in this section of the guide.
- To update or delete an existing notification, click ✎ EDIT to open the *Edit Notification* screen:

- On the *Edit Notification* screen (refer to Figure 2), update the trigger information and associated conditions as required and click SAVE CHANGES.
- To delete the notification, click DELETE.

Figure 2: *Notification Centre – Edit Notification*

The following training aids are also available for you to access on-demand:

Tide Knowledge Base

A knowledge base containing a library of *help* articles:

- Accessible via the *Help* icon in the main navigation in Tide
- Articles are grouped by category
- Context-driven help is also available by clicking ❔ on the various system screens

Useful Contacts

For technical support contact the *Service Desk*:

- **UK:** + 44 (0) 800 024 6089
- **Belgium:** + 32 (0) 800 16246
- **USA:** +1 8333 457 984
- **Service Desk Portal** – accessible via the *Knowledge Base*

For more information on *self-service reporting* and *data extraction* from Tide, contact
dasats.servicedesk@limoss.london

LIMOSS Website

- Slide decks running through the background to the Delegated Data Manager initiative
- Quick reference guides, covering steps in the delegated authority process in Tide
- Self-led video tutorials, focussing on each of the system elements
- Adoption tools