

Managing Push E-mail Notifications

For use with the Total Retirement Center (TRC)

About Push Email Notifications

This resource reviews the steps necessary to generate push e-mail notifications from the TRC on the status of files or administrative action needed.

Some examples of the events that can be sent are:

- Contribution File received, Contribution file processed, Debit ACH
- Salary Contribution Changes
- Loan Changes
- Demographic file and Compensation file

How to Set-up a Push Email

Under the **Plan Management** top line menu, select **Push Email** under the Preferences section.



1. To add a contact to the **Preferences Contacts**, hover over **Click Here**.

Preference Contacts ?

Preference Contacts
Establish Preferences
Transfer Preferences

*Preference contact changes or additions will only be updated within the Preference for Push-Email functionality. To update contact information for other purposes, please contact your account representative.

Choose a contact or select the link to filter the list.

Contacts

Kathie
Mark

To add a contact [click here](#) or delete this contact [click here](#).

First Name:
Middle Name:
Last Name, Suffix:
Display Name:

MM Contacts

To add a contact email [click here](#)

	Email	Confirm Email	Default
Delete	<input type="text"/>	<input type="text"/>	<input type="radio"/>

Save

2. Now enter your first and last name and your email address on the **Preference Contacts** screen and click **Save**:
3. On the **Establish Preferences** screen, select which e-mail notifications you would like to receive by checking the box and selecting **Add**:

Establish Preferences ?

Preference Contacts
Establish Preferences
Transfer Preferences

Choose a contact or select the link to filter the list.

Contacts

Kathie
Mark

Contact Email:

Select desired Events and Details:
Event/Status:

☐ Calculate Eligible Employees
☐ Compensation File
☐ Contribution File
☐ Demographic File
☐ Demographic/Compensation File
☐ Loan Monitoring Report
☐ Participant Fee Disclosure
☐ Payroll Changes
☐ Plan Year End Package
☐ Sponsor Disclosure

Select desired account level or View Names for more details.
Account Level:
Sponsor

Add **Reset**

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