

# Upcoming Liberty Message Center Enhancements

Releasing November 2023

Due to your valuable feedback, we will release some exciting enhancements to the Message Center later this month!

Message Center will have its own tab in Liberty to bring more attention to the requests from your firm, as well as sorting the items needing attention first.

Account	Representative	Name	Subject	Request Type	Sub-Type	Case #	Status	Create Date	Last Activity Date	Created By	Attachments
853788	A SMITH	Test margin four	Liberty DocuSign AAS New Account	New Account	Express	01413479	Pending Customer Response	08/25/2023 09:45:25 AM	08/25/2023 09:49:24 AM	LILLY	1
831052	Rosie the Rep	Fromm Acct	Test bubble	Account Maintenance		01408287	Pending Customer Response	07/19/2023 11:44:40 AM	07/19/2023 11:48:32 AM	Office Manager 32	0
252312	Isaif K. Nagell	Daljit Kuznet	jacob om	AAS TEST		01407989	Pending Customer Response	07/17/2023 08:14:08 PM	07/17/2023 08:16:01 PM	Ricom32	0
252312	Isaif K. Nagell	Daljit Kuznet	test jacob a	Account Beneficiary		01407983	Pending Customer Response	07/17/2023 04:03:02 PM	07/17/2023 05:11:33 PM	Rep for test	0

In addition, we are also streamlining how you can submit requests via the Message Center, allowing users to submit an inquiry/message to their Client Service Advocate, submit one request or submit multiple requests.

**Case Details**

You are creating a new case

**CASE INFORMATION**

**Nature of Request**

- Select One
- Select One
- Client Service Inquiry
- Submit Single Request
- Submit Multiple Requests

**Case Details**

You are creating a new case

**CASE INFORMATION**

**Nature of Request**

Submit Multiple Requests

**Message (Optional to be included for all cases)**

Please process these requests.

**+ Browse**

Browse or Drag/Drop a file to add a new Case

**Click the Save button to send below cases for processing**

Document Name	Request Type	Account Number	Remove
IRA Distribution Request.pdf	Distribution	252312 Daljit Kuznet	Remove
Account Application and Agreement.pdf	New Account	829860 Lilly Test Trial	Remove

**Save Close**

Finally, to further make case creation on an account easier, we will have a new tile on the Account Overview page that summarizes open and in progress cases. This feature also allows for users to create a case for that account without having to navigate to the Message Center.

**LATEST ACCOUNT ACTIVITY**

Transaction	Statement Date	Trade Date	Post Date	Symbol	Security	Price	Quantity	Amn
Bank Interest			08/31/2023	n/a	Non-Security		0.0000	\$
<b>Total Transactions</b>							<b>0.0000</b>	<b>\$</b>

  

**ACCOUNT CASES**

Case #	Case Status	Request Type	Last Activity
1232235	In Progress	Account Maint	9/22/2023
2343453	New	Transfer In	9/27/2023

[+ Create](#)

**TOP ASSET CLASSES** [View holdings by asset class in more detail](#)

Additional details and user guides will be provided in the coming weeks. If you have any questions, please reach out to your Client Service Advocate for more information.

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