

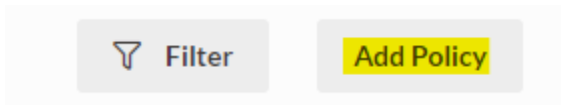
How to Add a Policy

Proformex allows you to manually add a policy on an individual basis. To add a group of policies, provide your Customer Success Manager with a spreadsheet of policy details and be sure to include Policy Number, Carrier, Policy Status, and Policy Type. If you're utilizing Document Requests, additional information will be required. Your CSM is available to assist with this process.

1. Navigate to **Business > Life Policies**



2. In the top right corner, click **Add Policy**



3. Enter required policy information and click **Add Policy**

 A screenshot of the 'Add Policy' modal form. The form has a title bar with 'Add Policy' and a close button (x). It contains four required fields, each with a yellow highlight: 'Policy Number' (text input), 'Policy Type' (dropdown menu), 'Carrier' (dropdown menu), and 'Policy Status' (dropdown menu). The 'Policy Status' dropdown is currently set to 'In Force'. At the bottom right, there are two buttons: a grey 'Cancel' button and a yellow 'Add Policy' button.

4. You will then be brought to that policy's Policy Details page where you can click **Edit** to enter additional policy values. Remember to **Save** your changes.

Policy Details

Edit

5. Navigate to the **Contacts** tab to add Owners, Agents, Insureds, Beneficiaries, and/or Other Advisors

Policy Information



Details

Contacts

Note, when a new policy is added manually, Document Requests are not automatically enabled. To enable, navigate to Scheduled Document Requests tab and click Enable Requests

Policy Information



Details

Contacts

Riders

Subaccounts

History

Documents

Notes

Tasks

Servicing



Reviews

Guidelines

Scheduled Document Requests

Document Request Schedule

There's nothing here yet!

Enable Requests

For additional questions, please refer to our [Help Center](#) or reach out to your Customer Success Manager