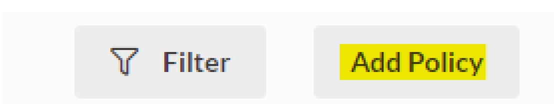
How to Add a Policy

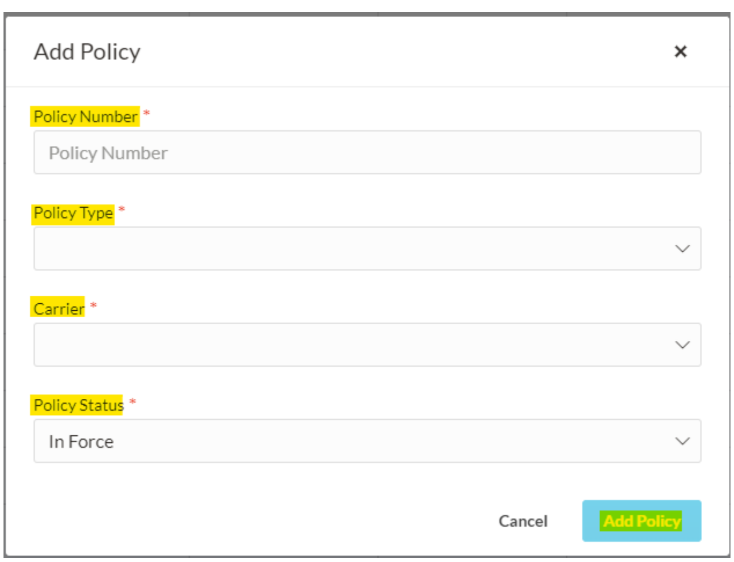
Proformex allows you to manually add a policy on an individual basis. To add a group of policies, provide your Customer Success Manager with a spreadsheet of policy details and be sure to include Policy Number, Carrier, Policy Status, and Policy Type. If you're utilizing Document Requests, additional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

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

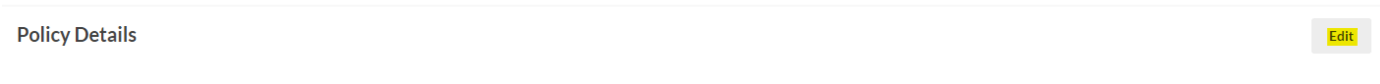
2. In the top right corner, click **Add Policy**



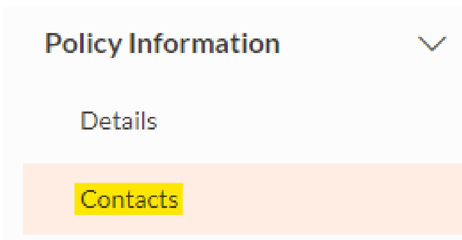
3. Enter required policy information and click **Add Policy**



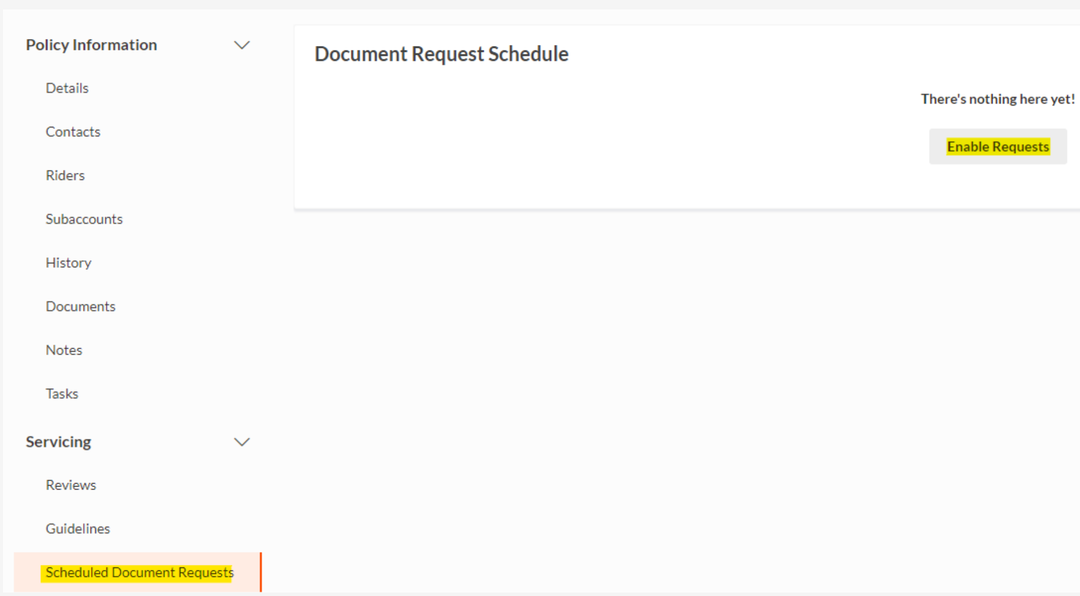
4. You will then be brought to that policy's Policy Details page where you can click **Edit** to enter additional policy values. Remember to **Save** your changes.



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



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



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