Guide to Portfolios

Contents
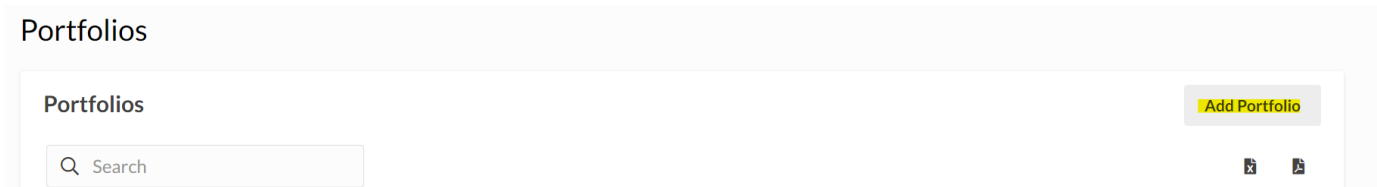
How to Generate a Portfolio Review

1. Navigate to **Servicing** > **Portfolios**
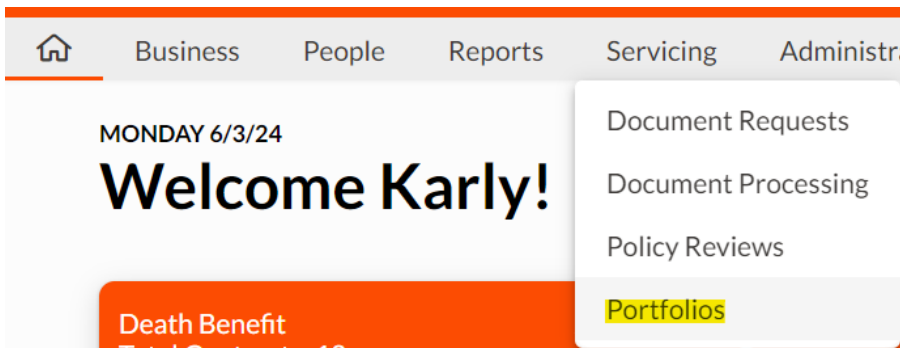
2. Click **Add Portfolio**

3. Input a **Portfolio Name**, check **Firm Level Portfolio** if desired to share with all Account Admins, and click **Save**

Add/Edit Portfolio

Portfolio Name

Portfolio Name

☑ **Firm Level Portfolio**

Cancel   Save

4. Within the Portfolios table, click the **hyperlink** of the new Portfolio under **Portfolio Name**

Portfolios   Add Portfolio

🔍 Search

Actions	Portfolio Name	Portfolio Type
⋮	Test Portfolio	Firm Portfolio

⏮ ◀ **1** ▶ ⏭   5 ⌄ rows   1 - 1 of 1 portfolios

5. Click **Add Contracts** on the top right

Portfolios / Test Portfolio

Test Portfolio   Add Contracts

6. **Search** by Contract Number, Agent(s), Owner(s), Insured, and Product to find the desired contracts. **Check** all that are applicable. Click **Add Contract(s)**

Add Contracts

☑	Contract Number	Agent(s)	Owner(s)	Insured
	Search Contr...	Search Agent	Sample	Search Insured
☑	123243	Martin Matthews	Multiple Owners	Matthew Smith
☑	3254352	--	Sample Owner	--
☑	345345043	Martin Matthews	Sample Owner	Chris Staple
☑	8976534	Martin Matthews	Sample Owner	Kelly Smith

|◄ ◄ **1** ► ►| 5 ∨ rows   1 - 4 of 4 policies

Cancel   **Add 4 Contract(s)**

7. Scroll down to the Reviews section and click **Create Portfolio Review**

Reviews   Create Portfolio Review

8. Change the **Review Name** as desired

Portfolios / Test Portfolio

Portfolio Review

Review Name

Test Portfolio 06/03/2024

9. Change **Group By, Order By**, and **Template** as desired

Contracts

Group By	Order By		Template		
Insured ▾	Annualized Premiu... ▾	Ascending ▾	▾	Export PDF	Add Custom Field

10. **Add Custom Field**(s) as desired

Contracts

Group By	Order By		Template		
Insured ▾	Annualized Premiu... ▾	Ascending ▾	▾	Export PDF	Add Custom Field

Once you add a custom field, you can enter a **Field Name** and check **Treat as currency**. Click **Save**

Add Custom Field

Field Name

Field Name

☐ Treat as currency

Cancel   Save

For each policy, input the value for the custom field by click the **Pencil icon**

Carrier	Contrac...	Product...	Product...	Issue D...	Annuali...	Cash Va...	Contrac...	Surrend...	Net De...	Owner	Benefici...	✎	🗑
MassM...	103348...	Term	--	--	--	--	--	--	--	Bob Matthe...	--	-- ✎	

Input the **Value** and click Save **Field**

Edit Test

Test

Value

Cancel   Save Field

11. Click **Save Portfolio Review** at the bottom right of the page

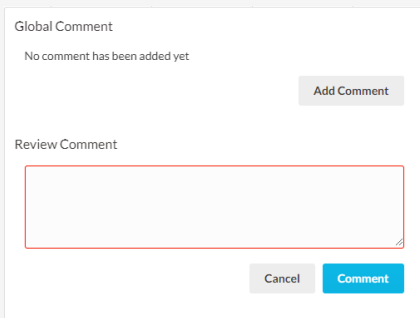Cancel   **Save Portfolio Review**
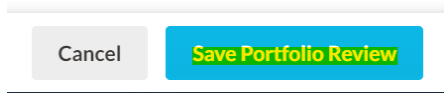
12. Prior to exporting a PDF, you can also add Comment(s) to any of the policies within the review. Nex to the policy, click **Add Comment** under Actions

Actions	Carrier	Contrac...	Product...
📣	AAA	12324	Term

Add a Global Comment or Review Comment by clicking **Add Comment**

Global Comment
No comment has been added yet
Add Comment

Review Comment
No comment has been added yet
Add Comment
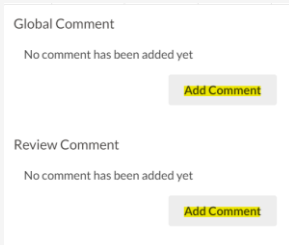
Type in the comment and click **Comment**

Global Comment
No comment has been added yet
Add Comment

Review Comment

Cancel   Comment

Please note that comments will appear on the PDF deliverable and Global comments will be saved for all reviews.

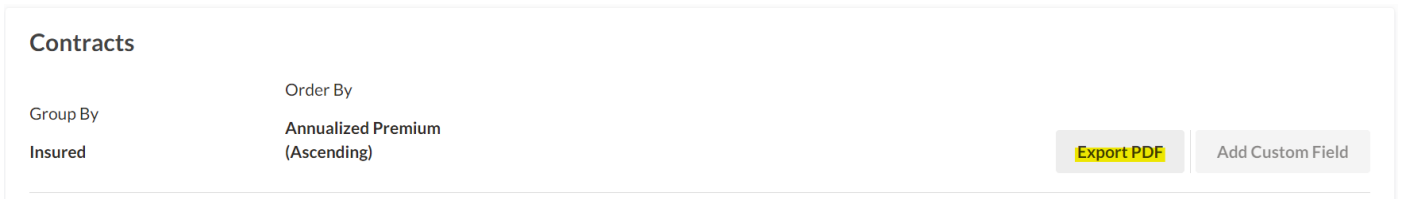**Mary Williams**

💬	Carrier	Contract Number	Product Type
1	AAA	12324	Term

Comments

1 Test comment

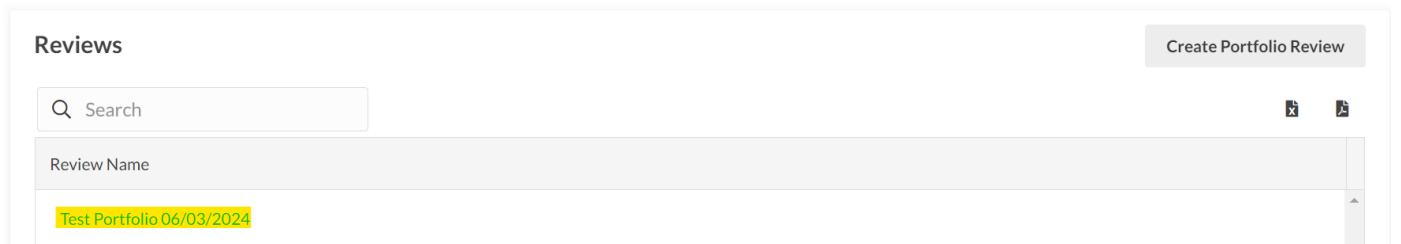13. After Saving, scroll up and click **Export PDF**

Contracts

Group By
Insured

Order By
Annualized Premium (Ascending)

Export PDF   Add Custom Field

14. The review will be saved under the Reviews section

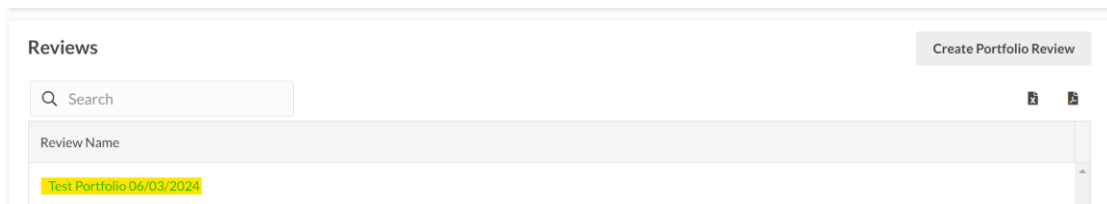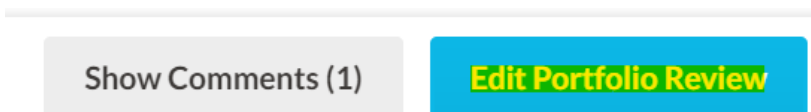**Reviews**   Create Portfolio Review

🔍 Search   📄   📄

Review Name

Test Portfolio 06/03/2024

How to Delete a Portfolio Review

1. Within the Portfolio, under Reviews, **select the existing Policy Review**

Reviews   Create Portfolio Review

🔍 Search   📄   📄

Review Name

Test Portfolio 06/03/2024

2. At the bottom right of the page, click **Edit Portfolio Review**

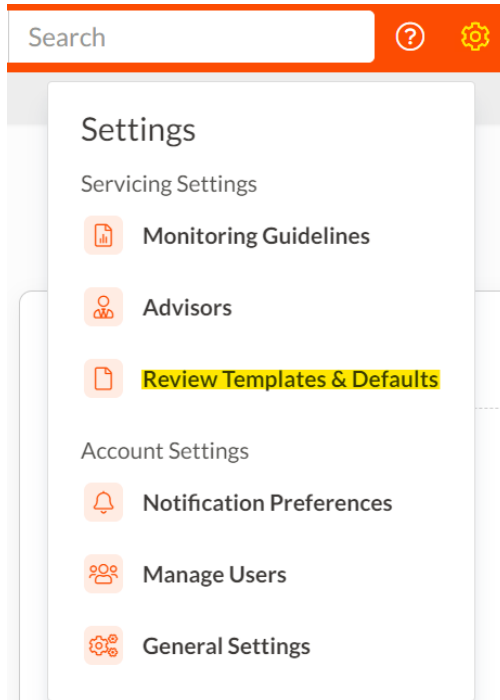Show Comments (1)   **Edit Portfolio Review**

3. At the bottom left of the page, click **Delete**

Delete

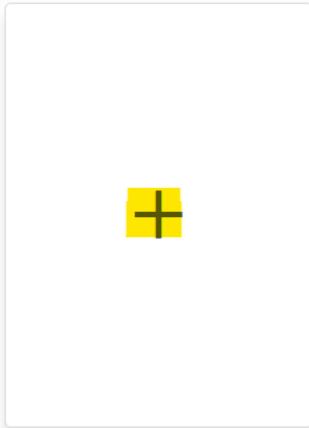## How to Create/Edit Portfolio Review Templates

1. At the top right of the page, click **Settings** followed by **Review Templates & Defaults**
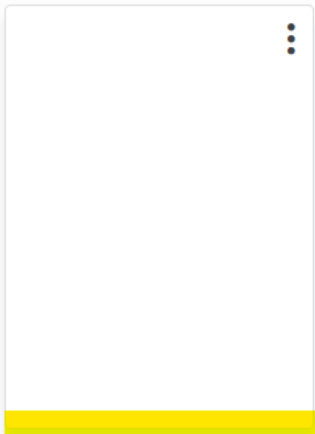

2. Select **Portfolio Review Templates**

3. Click **+** to create a **New Template**

New Template

OR

Simply **click an existing Template to Edit**

Proformex Default
Portfolio Review

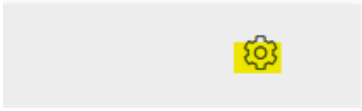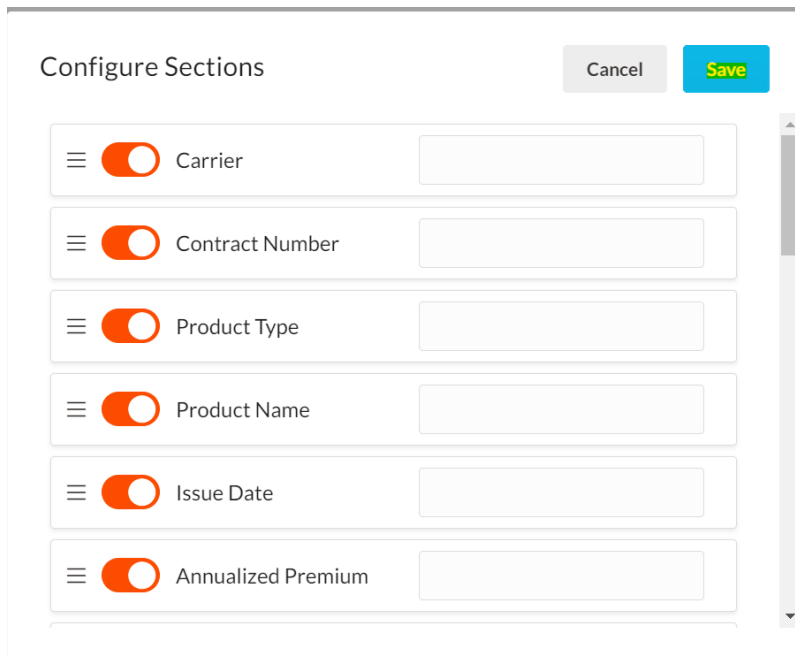4. If creating a New Template, input a **Name** and click **Create**

New Template

Name *

Name

Cancel   Create

5. At the top right, click **Configure Sections** gear icon to add/remove/reorder/ rename columns

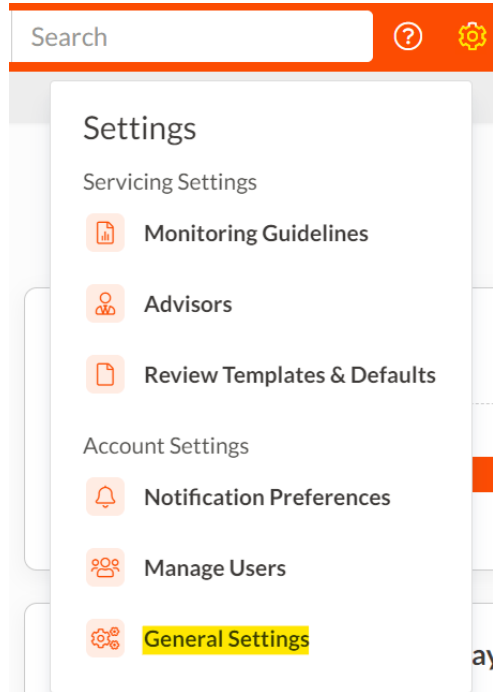6. Make your changes (toggle sections on/off, rename, drag to reorder) and click **Save**

How to Create/Edit Portfolio Review Defaults

1. At the top right of the page, click **Settings** followed by **General Settings**

2. Select Portfolio Review Defaults

3. Click **Edit** to apply a **Disclosure** to all Portfolio Reviews