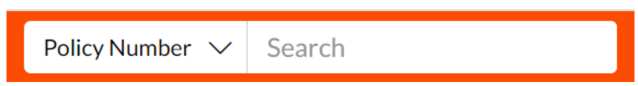
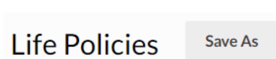
Guide to Leveraging Proformex

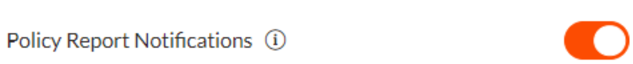
1. **Home Dashboard View:**
    - **Quick Actions Section** 
        - Immediately gain value and find key policy milestones
        - Discover lapse pending status, term conversion dates, and more!
    - **Configurable Reports**
        - Engage with clients by leveraging the interactive "Upcoming Anniversaries" and "Upcoming Premium Payments" default reports
    - **Search by Policy**
        - **Business** --> **Life Policies** --> Search by **Policy Number**
        - **Quick Search:** 

2. **On-Demand Custom Reporting:**
    - **Existing Reports**
        - Hover over the **Reports** tab --> Click **Policy Reports**
        - Access Proformex-provided reports such as Lapse Pending, Term Milestones, etc.
        - Your custom reports will be displayed here once saved.
    - **Create your own reports:**
        - **Business** --> **Life Policies** --> **Filter** (select your own criteria) 

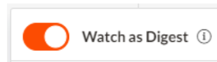
        - Remember to save and name your report for future reference.



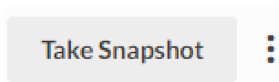
        - Any report you create can be displayed on the home dashboard
3. **Policy Report Notifications:**
    - **Notification Settings**
        - Click the Settings  icon and "Notification Preferences"
        - Enable notifications on a user and firm-level



- **Report Watching**
    - Add yourself as a "Watcher" in "**Policy Reports**" 

    - User will receive email notifications on policy milestones in a daily digest or on an individual-basis 

4. **Policy Snapshots**:
    - Click on the Policy Number to dive into policy information.
    - Click "**Take Snapshot**" to create a policy-level **PDF** for your clients.



5. **Proformex Support Page:**
    - Click the question-mark  icon
    - See our latest releases, articles, and video tutorials!
    - **Support Link:** https://support.proformex.com/

For additional questions, please reach out to your Customer Success Manager.