Proformex

Onboarding Checklist

- [x] Assign a **dedicated resource** committed to learning and using Proformex

- [x] Provide initial **data upload** spreadsheet(s)
    - Fill-in Bulk Template(s) or reference all available fields
    - Make sure to include:
      1) Policy Number **2)** Carrier **3)** Policy Status **4)** Policy Type **5)** Issue Date
      + Agent Name, Insured Name, Owner Name for Document Requests

- [x] Complete Agent / Owner / Trustee **authorization forms** to allow for Document Requests to be sent out

- [x] Setup a designated, standalone **return email** for Document Requests - where carriers will send statements and illustrations

- [x] Share **logo and company information** to be displayed on a Policy Review cover page. Also a default disclosure and recommendation section available.

- [x] Watch **online training sessions** and explore our Help Center to learn key functionality and best practices!

Invest the effort now to set yourself up for success