





## Submit Policy Upload in SoftPro 360® using Automation

Learn how to create Policy Schedules and upload final Policies using the AgentNet Automation feature in Softpro 360®.

## **Create Policy Schedules**

To create the policy schedules included in the Policy Upload Automation process, follow these steps:



- 1. From the Order tab, click
- 2. In the Documents screen, double-click the applicable policy
- 3. Highlight the selected policy, click 

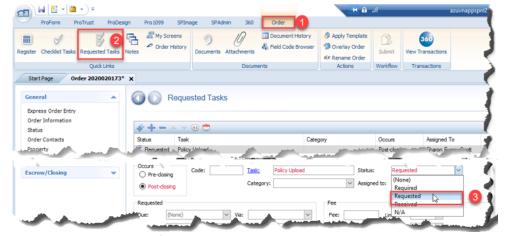
  ☐ Distribute ▼
- 4. Click Publish
- 5. Click Distribute •
- 6. Complete prompts as needed
- 7. In the **Publish To Order** window, enter **Name** and **Description** as needed **NOTE**: Policy Name can contain parenthesis and apostrophes, but not '&'.
- 8. Click OK
- 9. Click Order tab
- 10. Click Attachments

## **Initiate Submit Automation Process**

The Submit process created in the Automation Wizard activates based on the status specified in the task created in the SoftPro order. Before initiating the Submit Automation process, <u>Policy Schedules</u> should be published to ProForm Attachments. Once the details are updated in your SoftPro order, follow these steps to initiate the Submit Automation process:

Beginning from the SoftPro main screen:

- 1. Click Order tab
- 2. Click Requested Tasks tab
- Select Status: 'Requested'



4. Save and close your Softpro order

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