

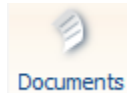


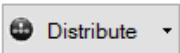
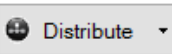
Submit Policy Upload in SoftPro 360® using Automation

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 
4. Click ☒ **Publish**
5. Click 
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 '&'.

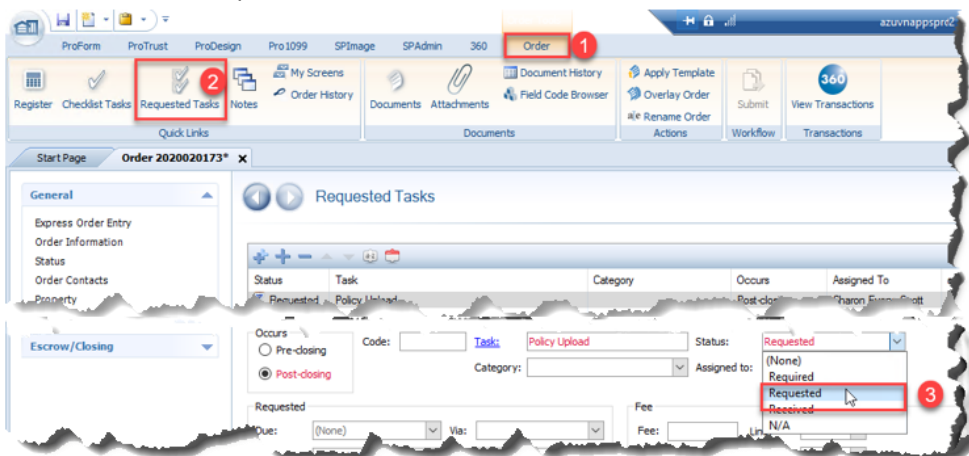
8. Click **OK**
9. Click **Order** tab
10. Click **Attachments**

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, [Policy Schedules](#) 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
3. Select **Status: 'Requested'**



4. Save and close your Softpro order