

FATIC - AgentNet Policy Image Upload User Guide

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July, 2023

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History

Date	Details
July 2023	Separating user guides per-product

Introduction

Using the ProForm order's information, the Policy Image Upload product will allow a user to send a copy of the completed policies to First American without leaving the integration.

Uploading Policy Images

1. To upload a policy image, click the **Add Product** icon at the bottom of the **Title Services** screen.



2. On the Available Products screen, select Policy Image Upload.



3. From the Add Document(s) screen:

The **Browse** will open the file browser on the PC or virtual machine.

The **Attachment** button list any documents saved within the ProForm order in the Attachment area.

The **Documents** button will not populate anything at this time.

Click **Submit** once the appropriate Policy(ies) are populated. Policy(ies) will need to be added one at a time.

4. Once the Policy(ies) have been added:

The name of the document can be changed utilizing the **Rename** button. Name changes made in this window to do **NOT** push back to the ProForm order or from the Browser location.

Any document added in error can be removed using the **Delete** button.

Click Submit.

5. Once the Policy(ies) have been sent to AgentNet the **Title Services** screen will update.



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	Services	:	First American Title			
Action	Product	Туре	Insured	Amount	Status	Created On
	Policy Image Upload				Processing	6/30/2023 3:42 PM
	Policy Image Upload				Processing	6/30/2023 3:42 PM

