

Using the Dashboard

This Quick Reference Guide outlines the features available on the TAC Dashboard

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

Exploring the Dashboard

The Dashboard is what you'll see when you first login to the TAC. It provides a snapshot of your business, including:

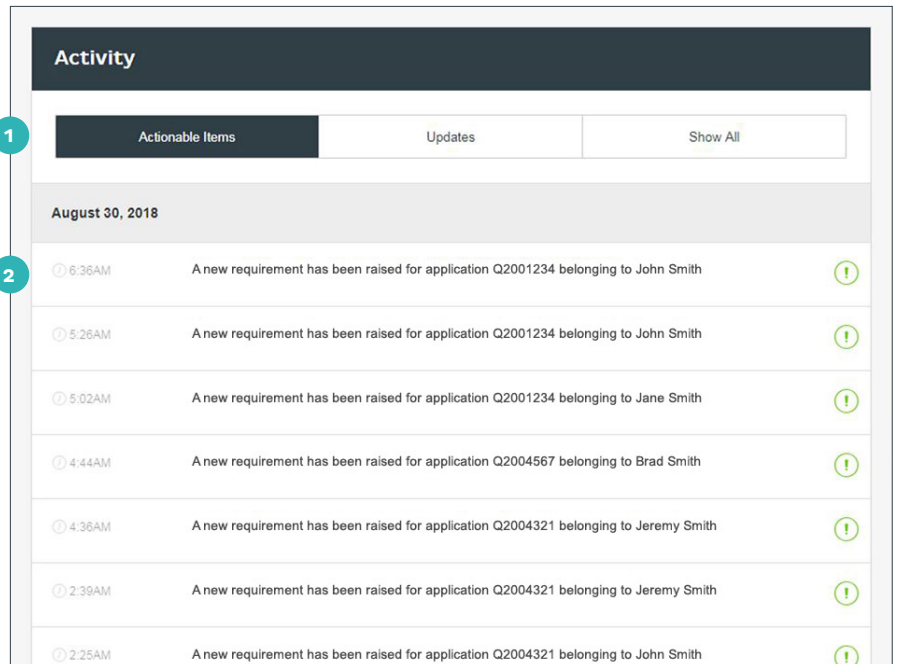
- 1 Business metrics, which are also pre-defined search categories. Clicking one of these will take you to the relevant records
- 2 Left-hand navigation, which lets you navigate to various TAC pages
- 3 Activity, which displays actionable items or updates for your client accounts
- 4 My Business, which provides reports on your in-force business segments. Clicking the segments will display the values associated with the various covers and benefits
- 5 Search, which opens the site-wide search functionality
- 6 Account settings, where you can update your access, users, password and product settings
- 7 Campaigns, news and notifications, where we'll keep you up-to-date on news and events from TAL and around the industry
- 8 Frequently Used Documents, giving you quick access to things you use most.

The screenshot shows the TAL Adviser Centre Dashboard interface. At the top, there are five key metrics: Proposals (578), Renewals (634), Overdue (124), Tele Interviews (47), and Ready to Inforce (2). Below this is the 'Activity' section, which lists recent actions such as 'A new requirement has been raised for application Q2001234 belonging to John Smith'. To the right of the activity is a 'Grow your way' section with a 'Leading education for forward thinkers' message. Below the activity is the 'My Business' section, featuring an 'Inforce Snapshot' for 31/07/2018 with a donut chart showing segments for Term (\$1M 03.92%), Income Protection (\$2M 04.56%), and Business Expense (\$1M 03.76%). The snapshot also shows a \$10,971,444 Inforce Premium and 6345 Defined Inforce Policy Count. On the far right, there is a 'Frequently Used Documents' list including Adviser Guide, Application Form, PDS, Payment Advice Form, and Medical Evidence Authority. A search bar is located in the top right corner. A left-hand navigation menu is visible on the left side of the dashboard.

Using the Activity Feed

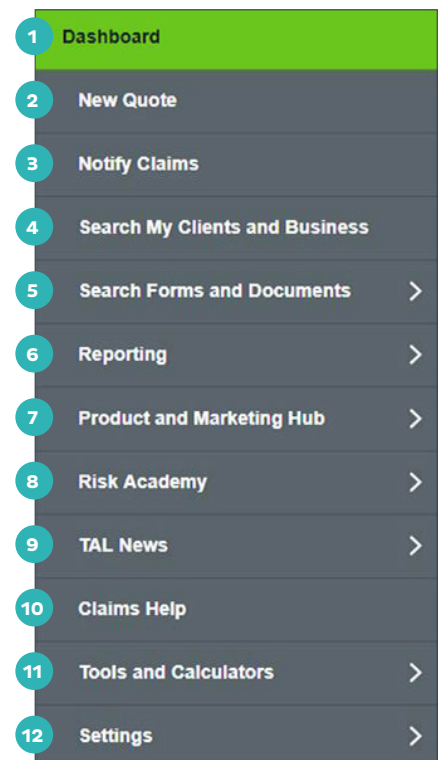
The Activity Feed displays items that need your attention, such as outstanding requirements, application status or tele-interviews.

- 1 The Feed includes three tabs – Actionable items, Updates, and Show all – which list:
 - Actionable items: applications with new or outstanding requirements, or policies ready to be placed in-force
 - Updates: tele-interview or application status, an underwriting decision on a policy, pre-assessment outcomes and rollover requests
- 2 Clicking an item will display the relevant information.



Using the left-hand navigation

- 1 Return to the Dashboard
- 2 Create quotes for new or existing clients and access client records
- 3 Notify TAL of an impending claim and initiate the claims process
- 4 Search for clients, policies, quotes and applications
- 5 Open the search page, where you can also order forms and documents
- 6 Access your reports and business insights
- 7 Access ideas, insights and resources to help you run a sustainable advice business
- 8 Explore continuous education and learning options
- 9 Stay up-to-date with TAL and industry news
- 10 Access information about our claims process, standards and case studies
- 11 Access tools like our BMI calculator, the TAL Reality Checker, PMAR tracking and investment resources
- 12 Manage your TAC settings, including product defaults or settings, data feed and password.



If you need a hand, contact us on **1300 286 937** or via email at **acceleratedservice@tal.com.au**

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