

Business Insights and Reporting

Understanding the available reports in TAC, their functionality, and how to export them.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Business Insights Dashboard

To access the Business Insights and Reporting dashboards in TAC:

- 1 Select **Business Insights and Reporting** from the left-hand panel of the home dashboard.
- 2 The Business Insights dashboard is divided into tiles, with each tile displaying a summary of the report data within.

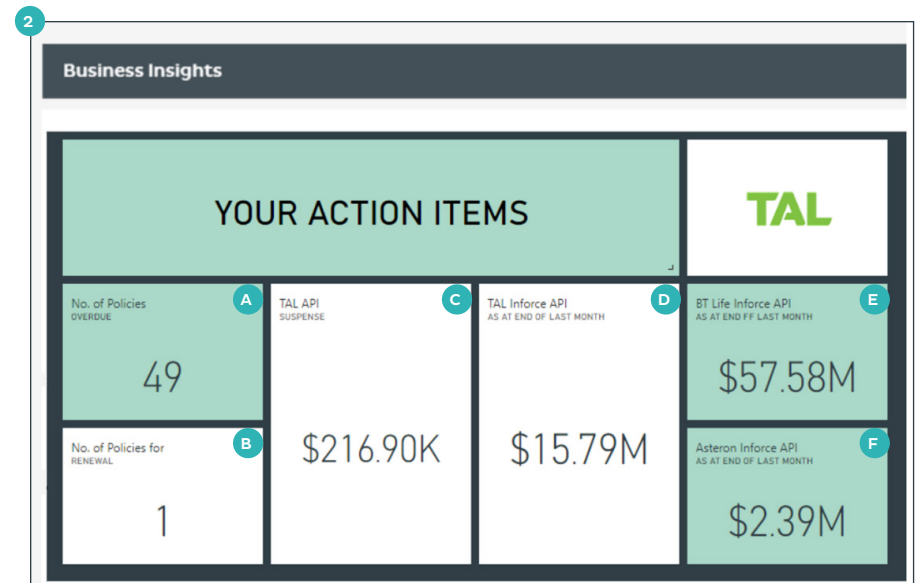
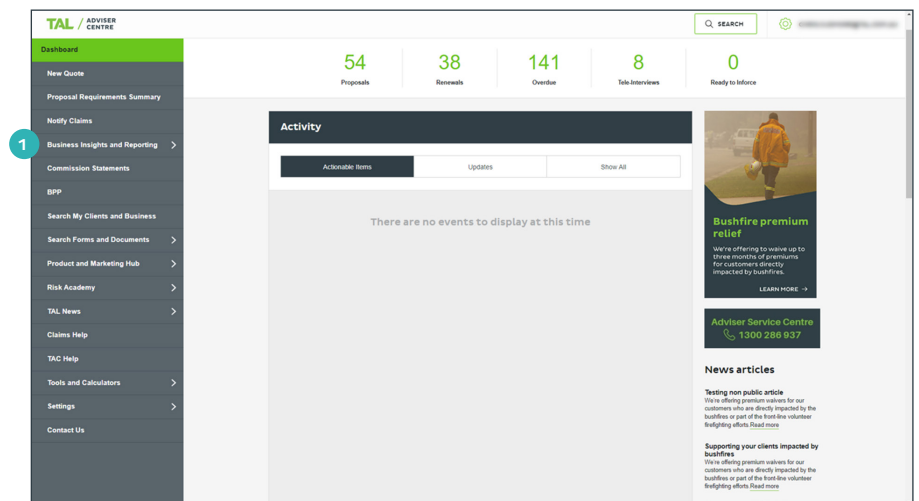
The available reports include:

- A No. of Policies Overdue (Total across all brands)
- B No. of Policies for Renewal (Total across all brands)
- C TAL Suspende
- D TAL Inforce
- E BT Life Inforce
- F Asteron Inforce

Please note:

Brand-specific tiles will only display a report summary if there are policies of the given brand included in the portfolio.

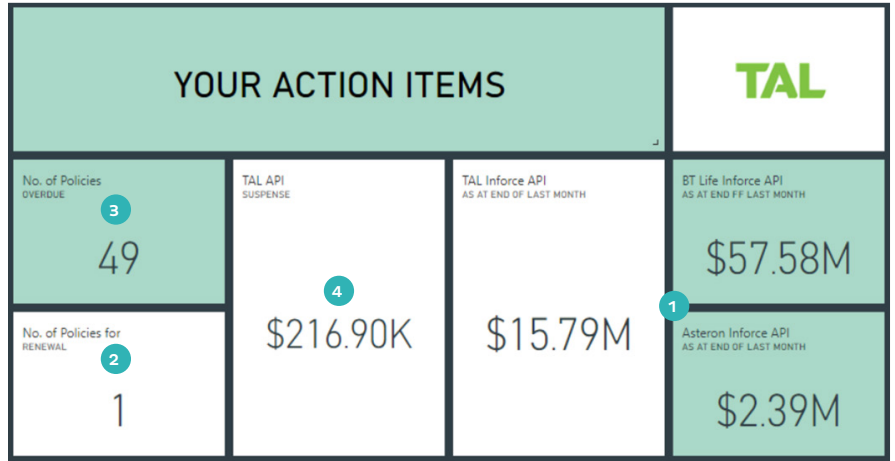
i.e. If there are no TAL policies in the portfolio, the TAL Inforce tile will be blank.



Business Insights Reports

Selecting a report tile on the Business Insights dashboard will expand the interactive report view.

See the headings below for more information on each report.

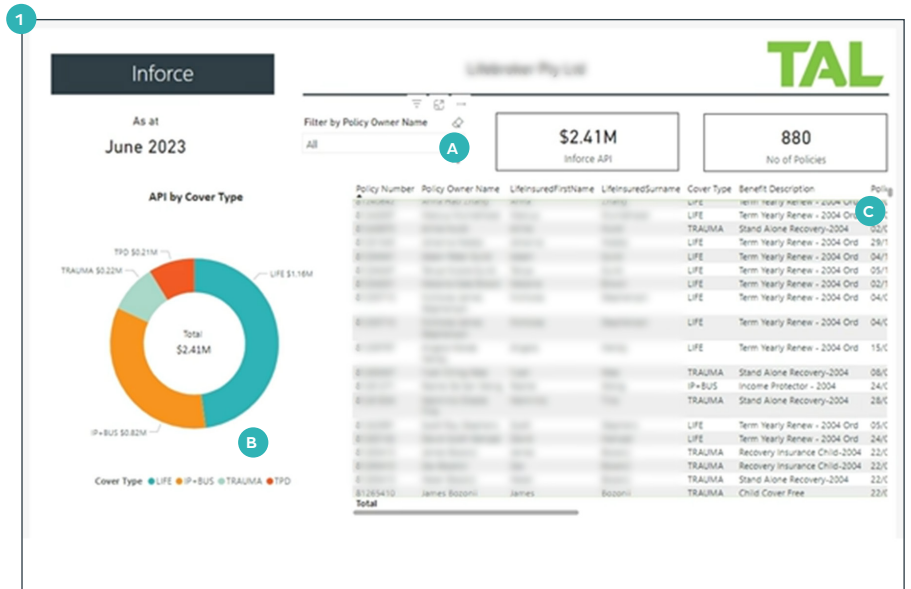


Inforce

1 The brand-specific **Inforce** reports (i.e. TAL, BT Life, Asteron) provide a view of exclusions, buy-backs, reinstatement options, and beneficiary details, as applicable.

These reports can be filtered by:

- A Policy Owner Name
- B Selecting a chart segment to display the corresponding policies in the data table.
- C Selecting one or more item(s) from the data table.

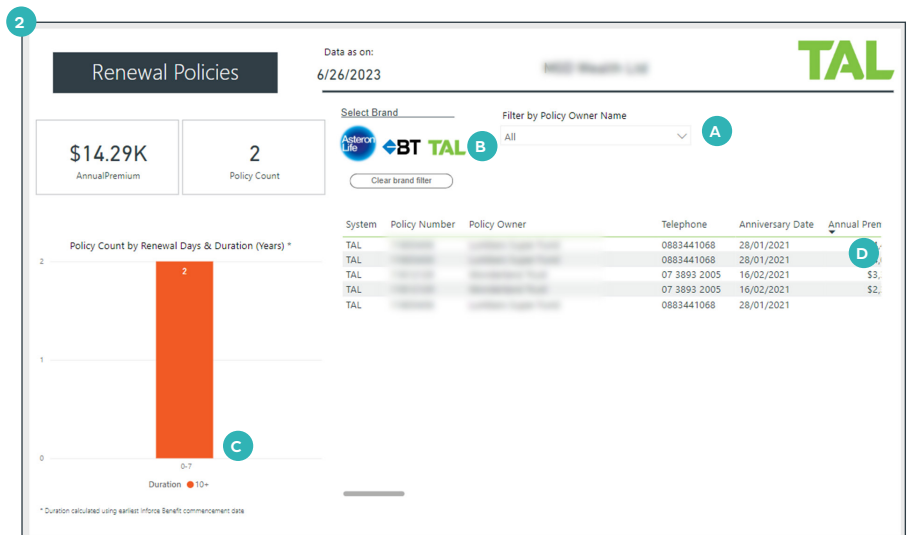


Renewal Policies

2 The **Renewal Policies** report provides a view of the policies in the portfolio that are nearing renewal date.

This report can be filtered by:

- A Policy Owner Name
- B Brand
- C Selecting a bar of the graph to display the corresponding policies in the data table.
- D Selecting one or more item(s) from the data table.

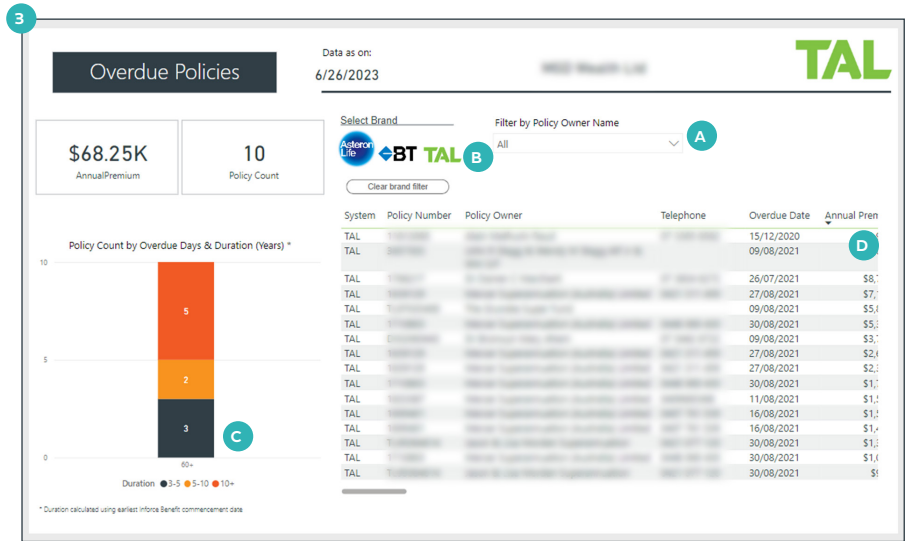


Overdue Policies

3 The **Overdue Policies** report provides a breakdown of the policies in the portfolio with overdue premiums.

This report can be filtered by:

- A Policy Owner Name
- B Brand
- C Selecting a bar of the graph to display the corresponding policies in the data table.
- D Selecting one or more item(s) from the data table.

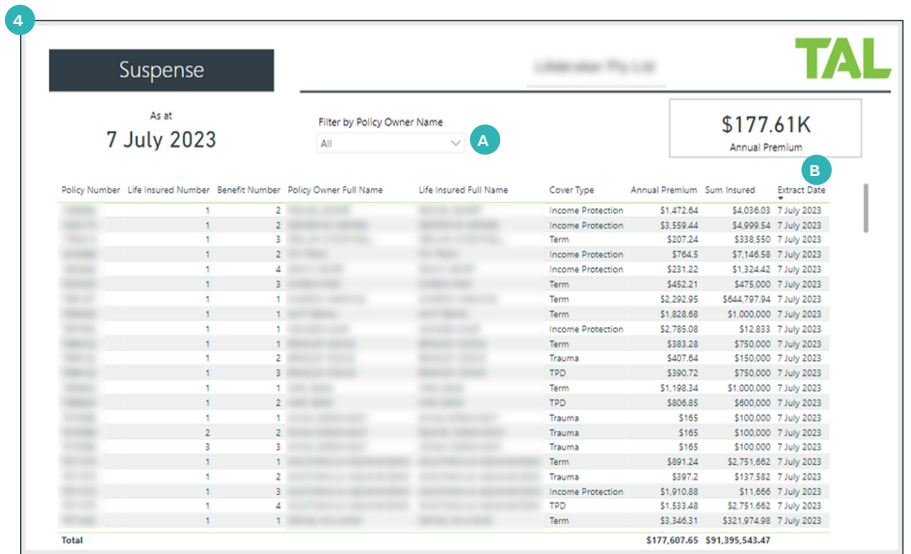


Suspense

4 The **Suspense Report** is a **TAL-only** report and provides a view of the policies in the portfolio that are in suspense.

This report can be filtered by:

- A Policy Owner Name
- B Selecting one or more item(s) from the data table.



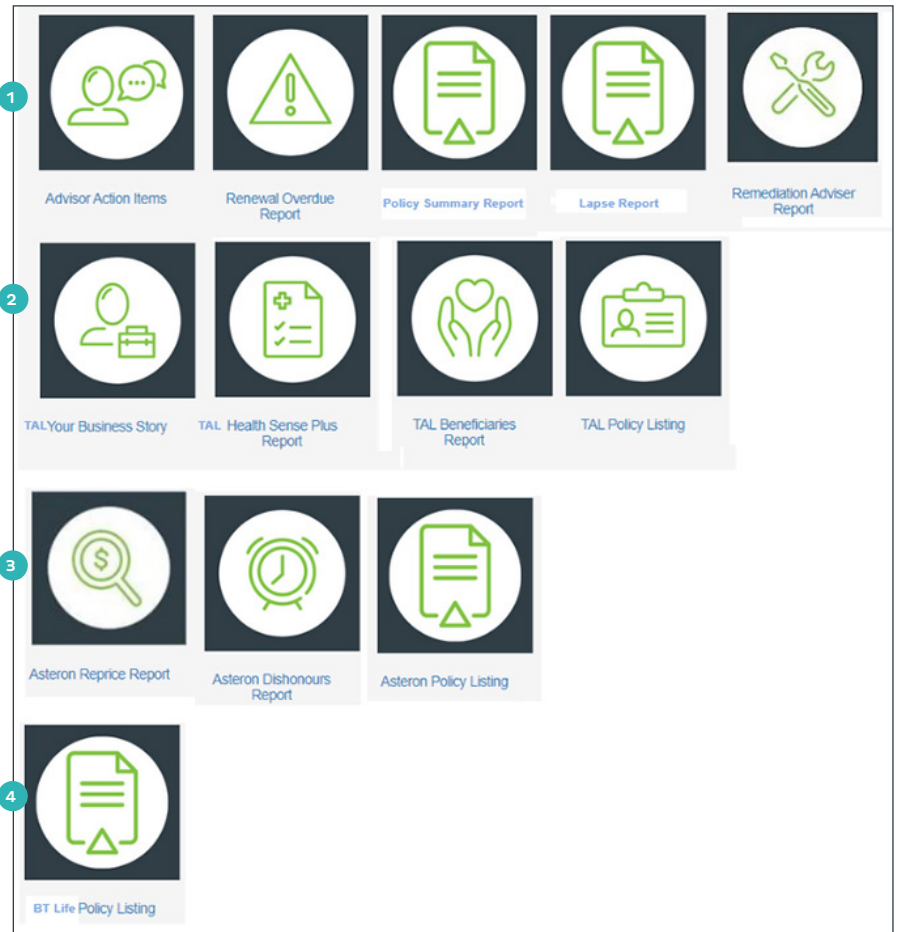
Reports Dashboard

Underneath the Business Insights dashboard is the **Reports** dashboard.

Selecting a tile from the Reports dashboard will expand the report view.

The tiles of the Reports dashboard are grouped into **brand-specific** rows as follows:

- 1 The reports on the first row of the dashboard combine policy data from **all** brands in the portfolio.
- 2 **TAL-specific** reports are grouped on the second row of the dashboard.
- 3 **Asteron-specific** reports are grouped on the third row.
- 4 **BT Life-specific** reports are grouped on the fourth row.



Policy Listing Report

The brand-specific policy listing reports provide a view of submissions, completions, and lapses for each brand in the portfolio, as applicable.

To view a policy listing report:

- 1 Select **either**:
 - A TAL Policy Listing
 - B Asteron Policy Listing
 - C BT Life Policy Listing



Export and Download

To export and download the data from a report:

- 1 **Hover** the cursor over the chart or table and select the **More options** elipsis menu.
- 2 Select **Export data**
- 3 Choose how the exported data is formatted by selecting from one of the following tiles:
 - A **Data with current layout**
 - B **Summarised data**
 - C **Underlying data**

A Data with current layout

Export the data in the same layout but without icons or colours.

B Summarised data

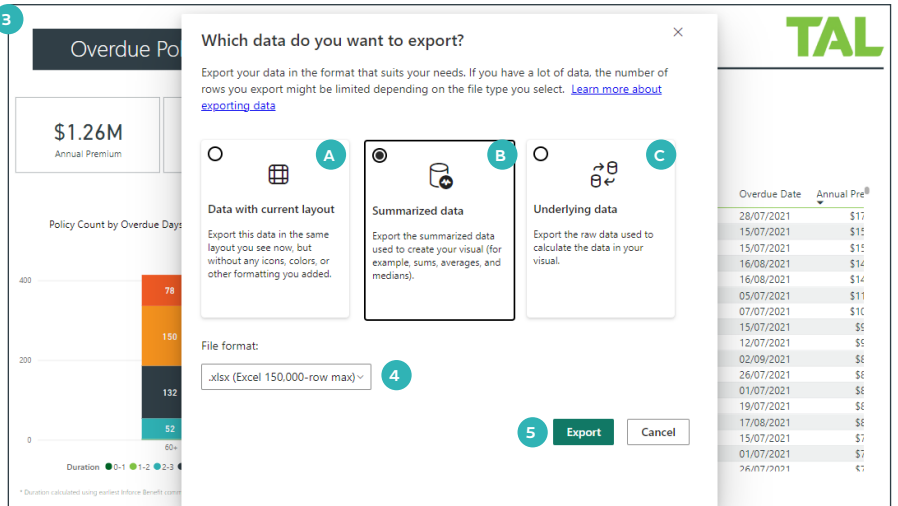
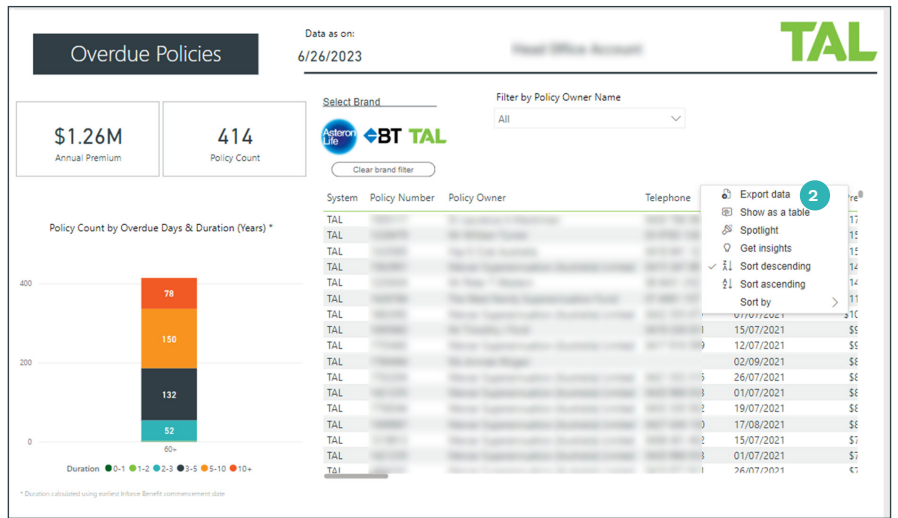
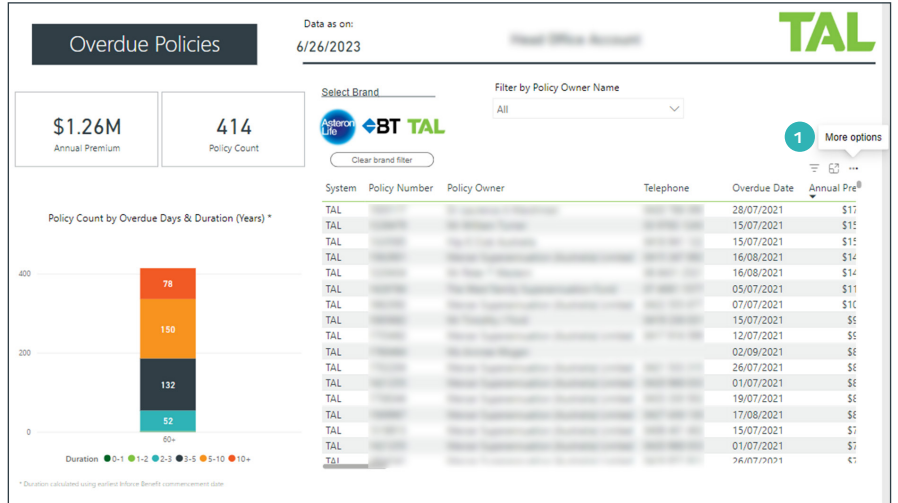
Export the summarised data used to create the visual.

C Underlying data

Export the raw data used to calculate the visual.

- 4 If applicable, use the drop-down menu to choose a file format (.xlsx or .csv).

- 5 Select **Export** to download and open the extracted report data.



For more information, please contact us on the details below:
TAL and Asteron - 1300 286 937 (Monday to Friday 8am - 7pm AEST)
BT Life - 1300 553 764 (Monday to Friday 8am - 6:30pm AEST)

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