

Searching the TAC

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

This Quick Reference Guide outlines how to use the search functionality on the TAC

Searching for a client

TAC's universal search functionality lets you search for clients' records, as well as news, forms and documents.

You can search for clients by their surname, first name, date of birth, quote and policy number.

- 1 Search results appear under the filter options. Click the plus symbol to show an overview of the client's policies
- 2 Filter results by clicking the plus symbol and selecting the filters you want to apply. The page will automatically refresh as you select filter options
- 3 To remove a filter from your search, click the relevant radio button or remove all filters by clicking the 'Remove filters' link
- 4 Click the close (X) icon to exit the search page and return to the Dashboard.

The screenshot shows the search results for 'John Smith'. At the top, there is a search bar with 'John Smith' entered and a magnifying glass icon. Below the search bar, there is a hint: 'Hint: To perform a date of birth search, please only use the format DD/MM/YYYY. To perform an exact match search on a client name, please use quotation marks. "John Smith"'. Below the hint, it says 'Showing 1 - 1 of 1 for "John Smith"'. There are three tabs: 'Clients (1)', 'Forms & Documents', and 'News'. Below the tabs, there is a filter bar with 'Filter: All' and 'All' selected, and a 'REMOVE FILTERS' button with a plus sign. Below the filter bar, there is a table with columns 'First Name', 'Last Name', and 'Date of Birth'. The table contains one row: 'John', 'Smith', and '01/02/1990'. There is a plus sign at the end of the row.

The screenshot shows the search results for 'John Smith' with filters applied. At the top, there is a search bar with 'John Smith' entered and a magnifying glass icon. Below the search bar, there is a hint: 'Hint: To perform a date of birth search, please only use the format DD/MM/YYYY. To perform an exact match search on a client name, please use quotation marks. "John Smith"'. Below the hint, it says 'Showing 1 - 1 of 1 for "John Smith"'. There are three tabs: 'Clients (1)', 'Forms & Documents', and 'News'. Below the tabs, there is a filter bar with 'Filter: Policy' and 'Inforce' selected, and a 'REMOVE FILTERS' button with a minus sign. Below the filter bar, there are two columns of radio buttons: 'Category' and 'Category Status'. The 'Category' column has options: 'All', 'Quote', 'Application', 'Expired-All', 'Archived-All', 'Policy' (selected), and 'Policy - Proposal'. The 'Category Status' column has options: 'All', 'Inforce' (selected), 'Renewal', 'Overdue', and 'Lapse'. There is a 'For the period' dropdown menu with '.... select date'.

Viewing search results

To view the details of your search results, click the plus sign on the relevant client record.

The result will expand to display a high-level overview, including:

- Product name
- Policy status
- Policy or quote reference number
- Policy or quote sum insured
- Policy or quote premium details
- Link to the policy, quote or application.

1 To view a client's record, click either their first or last name

2 To open a policy, application or quote, click the link to the right: 'View policy'.

The screenshot shows a search interface with a search bar containing 'John Smith'. Below the search bar, there are tabs for 'Clients (1)', 'Forms & Documents', and 'News'. A table displays search results for 'John Smith' with columns for First Name, Last Name, and Date of Birth. A second table below shows policy details with columns for Product, Reference #, Details, and Premium. A 'View Policy' link is visible at the end of the row.

First Name	Last Name	Date of Birth
John	Smith	01/02/1980

Product	Reference #	Details	Premium
In Force Accelerated Protection	1234567	\$6,352.02 Income Protection Insurance	Annual Premium \$1,986.48

Searching forms, documents and news articles

Search results for forms and documents display the most recent versions available. From here, you can order or download the relevant form or document and also filter your search to show only:

- Administration forms
- Adviser education
- Claims
- Customer marketing
- Investments
- PDS and essential materials
- Underwriting questionnaires

You can also search for news articles, blog entries and press releases via the 'News' tab.

The screenshot shows a search interface with a search bar containing 'PDS'. Below the search bar, there are tabs for 'Clients', 'Forms & Documents (20)', and 'News'. A table displays search results for 'PDS' with columns for Form title, Category, Published, Order, and Download. Each row includes a PDF icon and a file size.

Form title	Category	Published	Order	Download
About TAL - more than just insurance	PDS & Essential Materials	Jul 20, 2018	Order	PDF (945KB)
Accelerated Protection Adviser Guide	PDS & Essential Materials	Jul 20, 2018		PDF (3KB)
Accelerated Protection Application Form	PDS & Essential Materials	Jul 20, 2018	Order	PDF (1KB)
Accelerated Protection At a glance	PDS & Essential Materials	Jul 20, 2018	Order	PDF (1KB)
Accelerated Protection for Investment Platforms PDS	PDS & Essential Materials	Jul 20, 2018	Order	PDF (535KB)
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If you need a hand, contact us on **1300 286 937** or via email at acceleratedservice@tal.com.au

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