## Searching the TAC

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

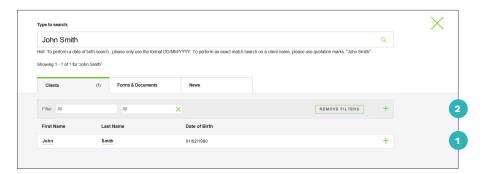
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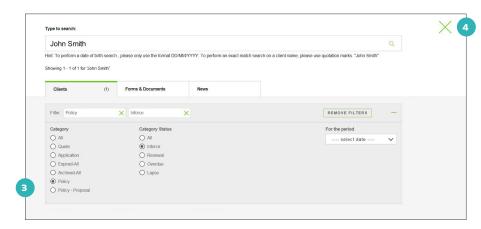
## Searching for a client

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
- 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.





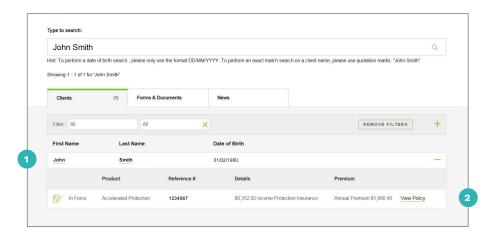


## Viewing search results

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'.

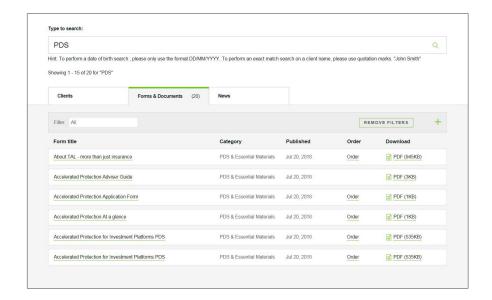


## Searching forms, documents and news articles

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
- $\cdot \ \mathsf{Underwriting} \ \mathsf{questionnaires}$

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



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

adviser.tal.com.au

