Your reports and business insights

This Quick Reference Guide outlines how to run reports and access your personal business insights

**TAL ADVISER CENTRE
QUICK REFERENCE GUIDE**

Accessing and running reports

The reporting section on TAC allows you to run reports on your business with TAL.

1 Access the Reporting section via the left-hand navigation

2 On the Reporting page, you can filter by Adviser or Distributor number as required

3 The reports that can be run and exported include:

- Proposal report
- Policy summary report
- Renewals report
- Overdue report
- Lapse report

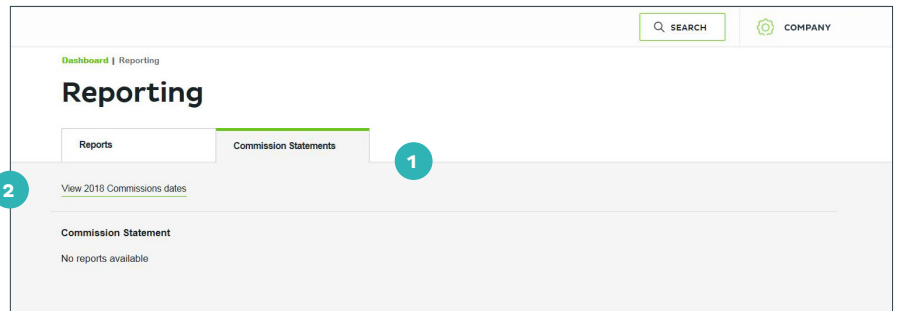To run a report, click 'Export Excel' or 'Export PDF'.
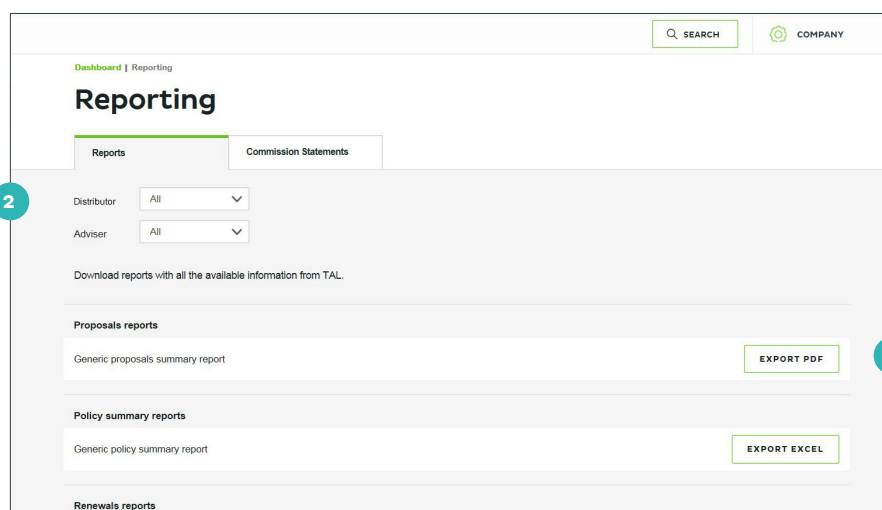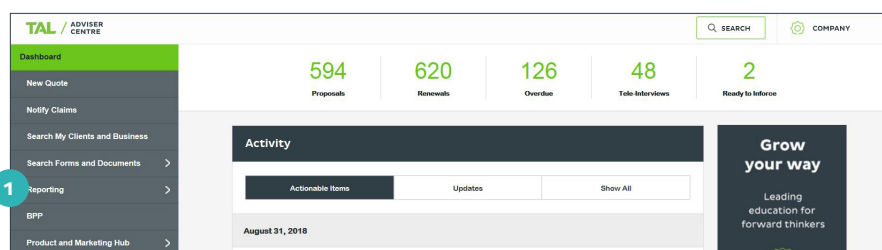
Accessing commission statements

Commission's statements are available provided you have the appropriate permission.

1   Click the Commission Statements tab

2   View commission dates

Commission statements are listed in date order and can be downloaded in Excel or PDF format.
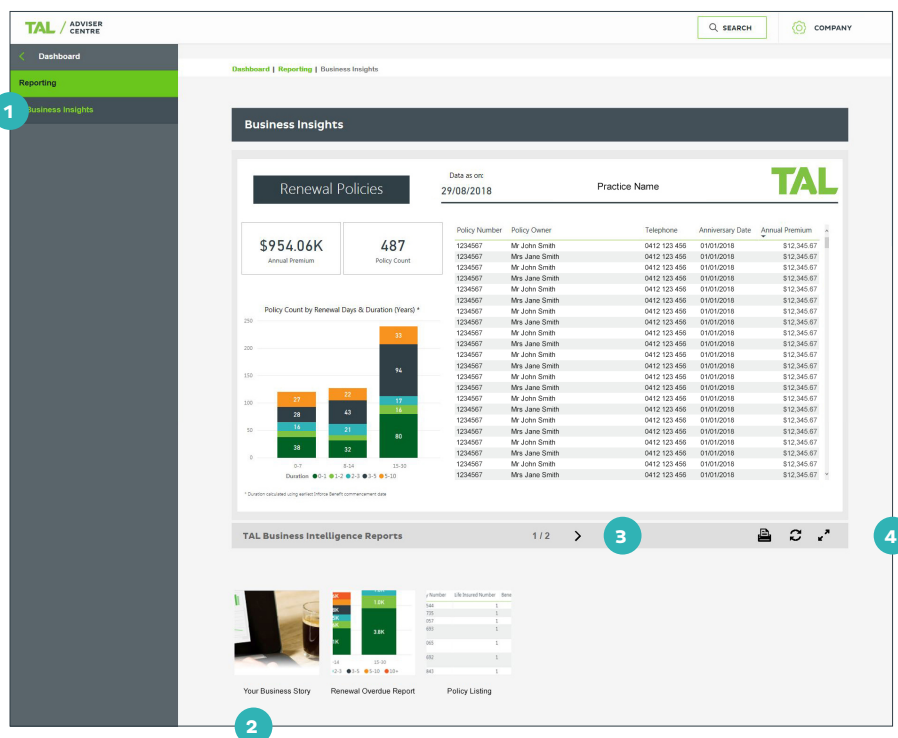

Accessing your business insights

Business Insights provide customised reports about your business activities.

1   Click 'Business Insights' in the left-hand navigation

2   There are three sections within Business Insights:

• Your Business Story
• Renewal Overdue Report
• Policy Listing

Each section contains pre-defined interactive reports on your business, which can be customised to provide the information you need

3   Navigate through the report by clicking the left and right arrows

4   Reports can be printed, refreshed, downloaded or viewed as a presentation.

Navigating the Renewal and Overdue Report

Your Renewal Overdue report will automatically display on the Business Insights page, and includes:

1 The title of the report and report data as of a specific date

2 Annualised premium and policy counts for policies

3 Policy count by days and duration

4 Selected policy details

5 Interactive data. Clicking on a segment of the graph will display corresponding policies in the data table, while clicking a policy in the data table will change the annual premium and graph to show that policy's details.

Your Business Story section

This section lets you present reports on your business, through four interactive pages:

- In-force policy overview
- Completions and submissions data for FYTD
- Lapse data for the FYTD
- Current FY vs last FY data.

1 Navigate through the report pages by clicking the left and right arrows

2 Each report includes interactive features so you can customise the data that displays. The interactive buttons will vary by report

3 Click the interactive buttons to change information. Multiple interactive buttons can be selected at once; a selected button will highlight in black.

Running Policy Listing reports

The Policy Listing section lets you to run reports on your:

- Submissions
- Completions
- Lapses.

1 The report will be blank until you enter dates to filter the data. Type your dates or use the slider to make a selection

2 You can filter policy information by selecting one or more policies from the drop down or by clicking a policy row in the data table

3 The data table can be sorted using the column headings.

Date	Policy Number	Life Insured Number	Benefit Number	Life Insured Name	Benefit Type	Annual Premium	Transaction Description
1/07/2017	1234567	1	5	JOHN SMITH	Income Protection	$1,488	Additional Benefit Proposed
26/07/2018	1234567	1	6	JOHN SMITH	Term	$509	Additional Benefit Proposed
27/07/2018	1234567	1	4	JOHN SMITH	Term	$279	Additional Benefit Proposed
28/05/2018	1234567	1	2	JOHN SMITH	Term	$3,818	Additional Benefit Proposed
25/07/2018	1234567	1	2	JOHN SMITH	Term	$136	Additional Benefit Proposed
28/11/2017	1234567	1	8	JOHN SMITH	Term	$1,768	Additional Benefit Proposed
28/11/2017	1234567	1	9	JOHN SMITH	TPD	$3,143	Additional Benefit Proposed
28/11/2017	1234567	1	10	JOHN SMITH	Trauma	$2,346	Additional Benefit Proposed
28/11/2017	1234567	1	11	JOHN SMITH	Income Protection	$2,483	Additional Benefit Proposed
28/11/2017	1234567	1	12	JOHN SMITH	Income Protection	$1,202	Additional Benefit Proposed
28/11/2017	1234567	1	13	JOHN SMITH	Trauma	$4,044	Additional Benefit Proposed
28/11/2017	1234567	1	14	JOHN SMITH	Income Protection	$1,774	Additional Benefit Proposed
17/05/2017	1234567	1	2	JOHN SMITH	Income Protection	$388	Additional Benefit Proposed
16/06/2017	1234567	1	2	JOHN SMITH	Income Protection	$1,878	Additional Benefit Proposed
26/07/2018	1234567	1	2	JOHN SMITH	Income Protection	$4,412	Additional Benefit Proposed
27/04/2017	1234567	1	2	JOHN SMITH	Income Protection	$151	Additional Benefit Proposed
24/09/2017	1234567	1	2	JOHN SMITH	Term	$326	Additional Benefit Proposed
20/09/2017	1234567	1	2	JOHN SMITH	Income Protection	$4,279	Additional Benefit Proposed
26/07/2018	1234567	1	2	JOHN SMITH	Term	$20	Additional Benefit Proposed
Total						**$2,805,563**	

Filter by date: 01/04/2017 — 05/08/2018

Filter by Policy Number: All

$2,805,563
Submission (as per date range selected)

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

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