Using the Dashboard

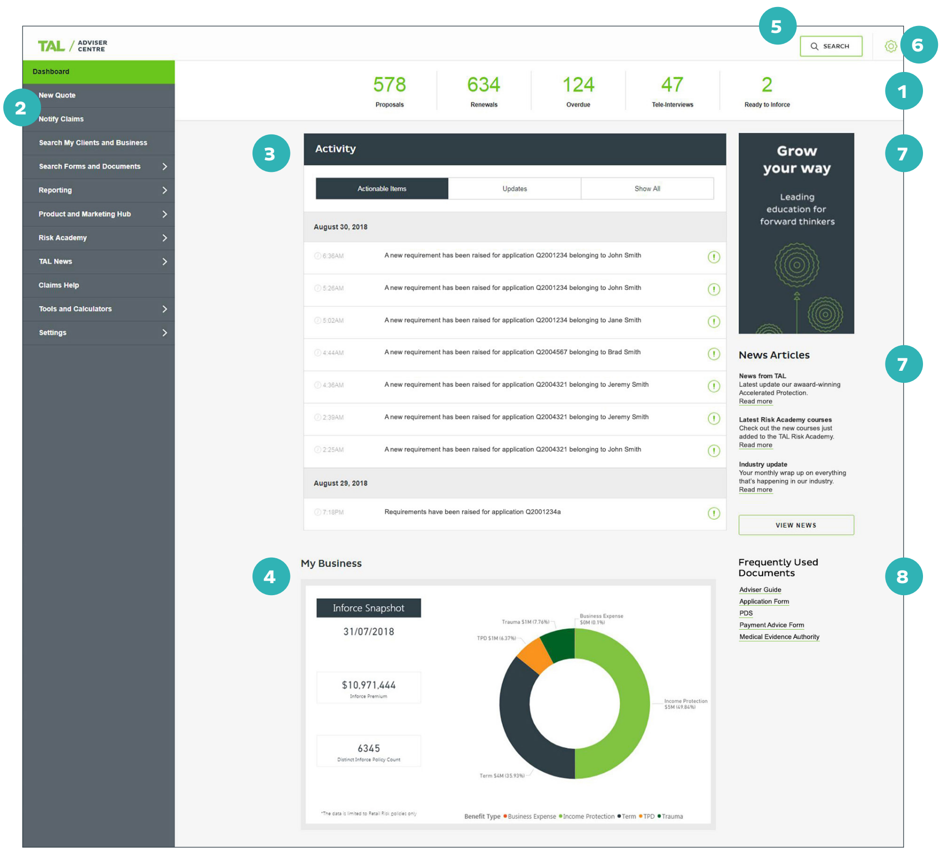
This Quick Reference Guide outlines the features available on the TAC Dashboard

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.



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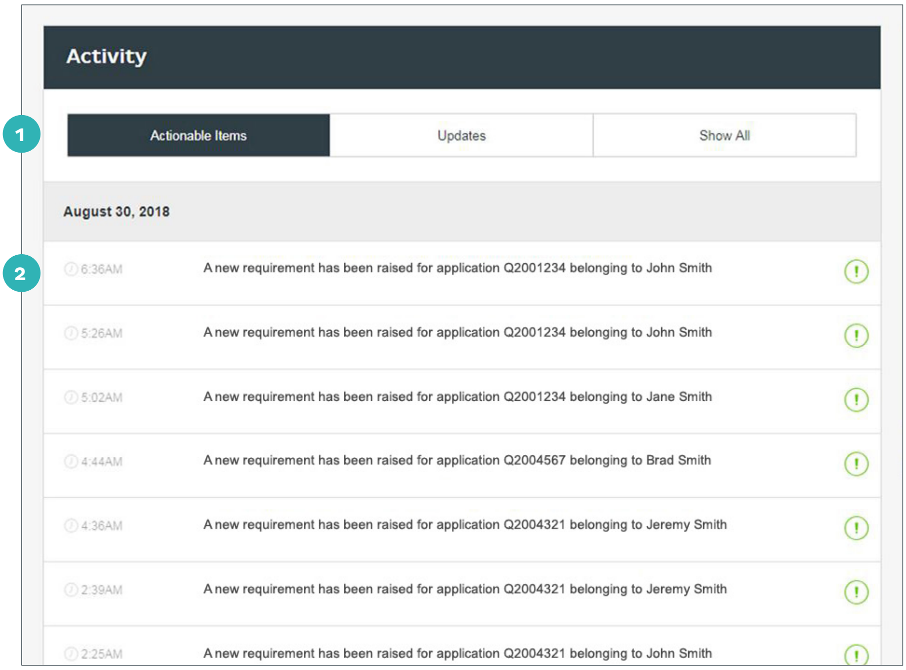
Using the Activity Feed

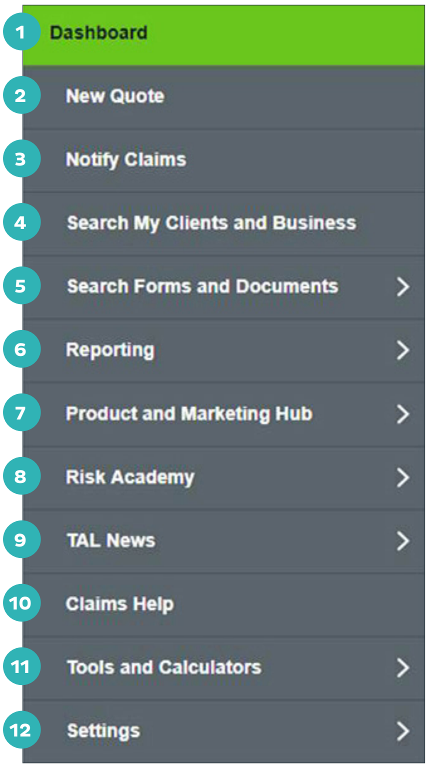
The Activity Feed displays items that need you attention, such as outstanding requirements, application status or tele-interviews.

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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