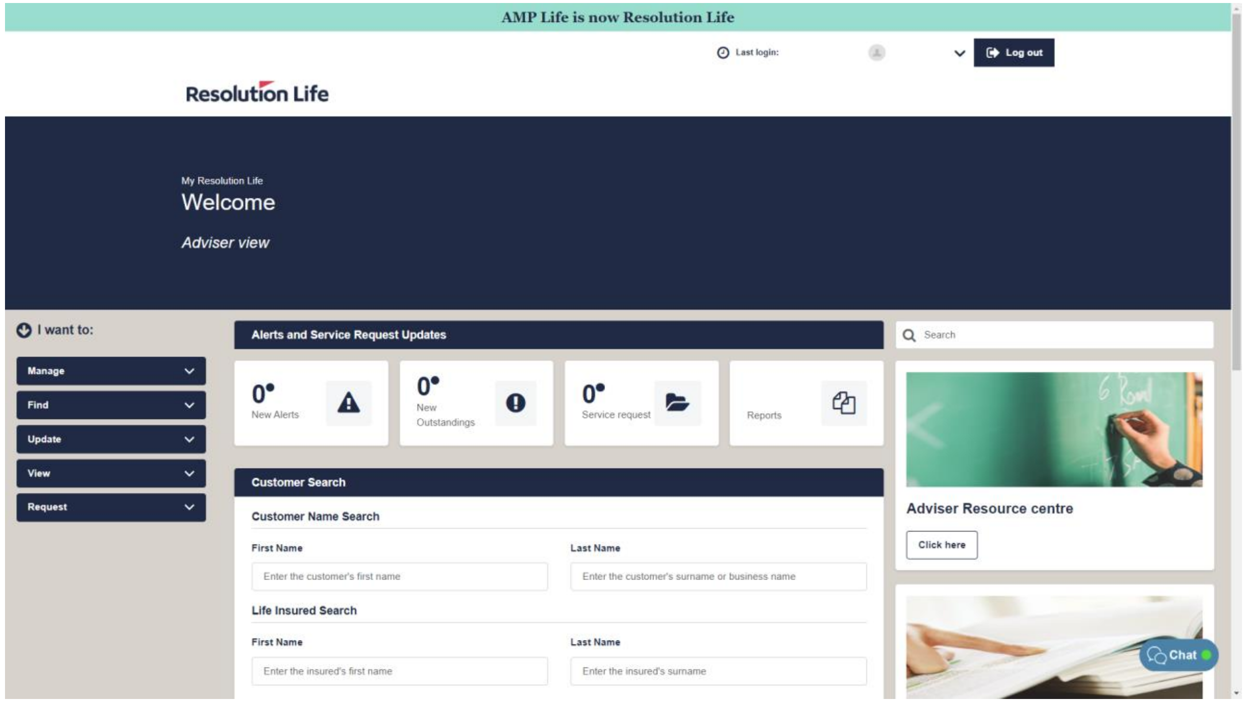
Resolution Life

My Resolution Life
Adviser user guide



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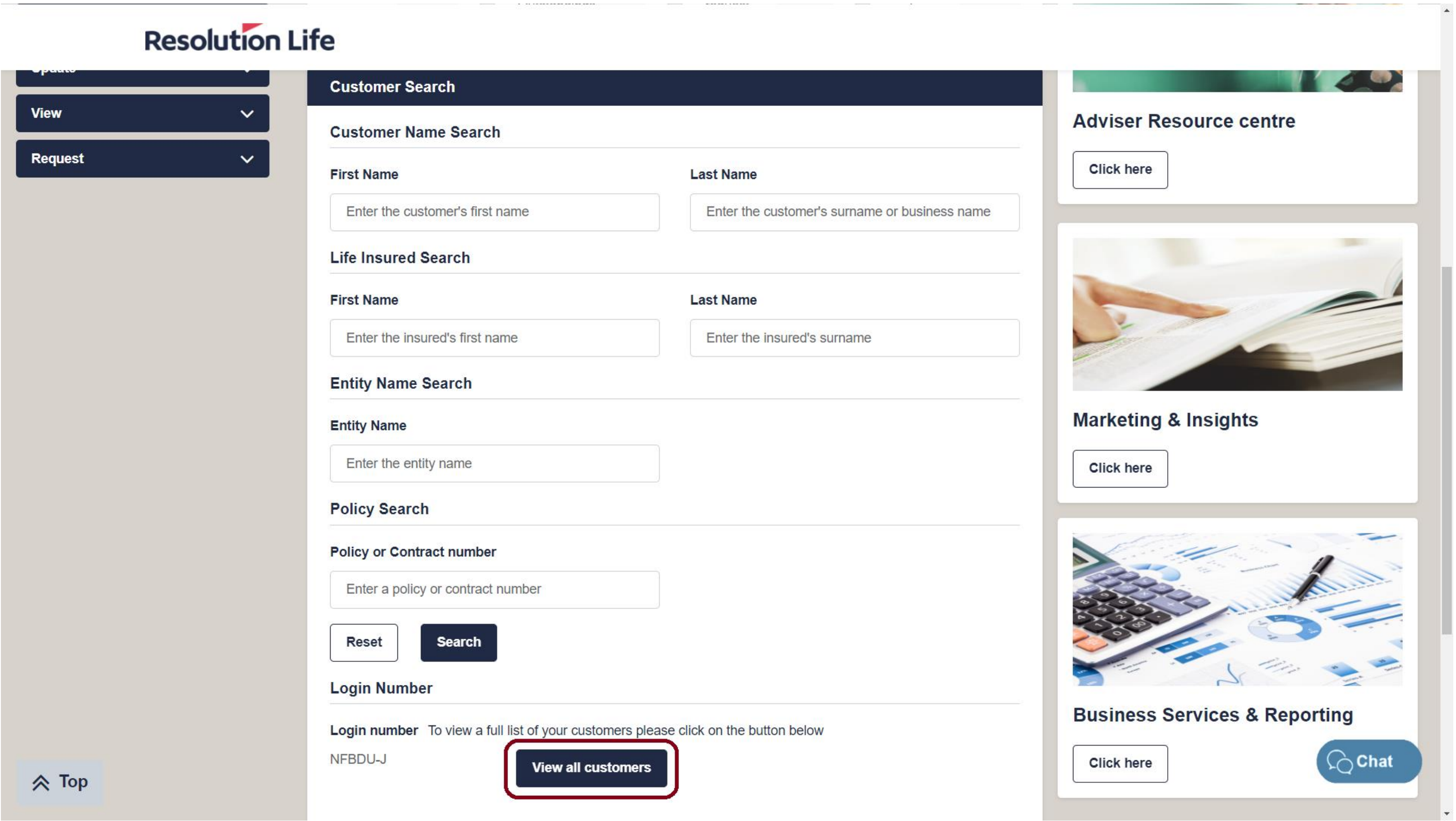
View all customers / Client Listing Report (1 of 3)

From the Customer Search screen on the home dashboard:

- Select **[View all customers]**

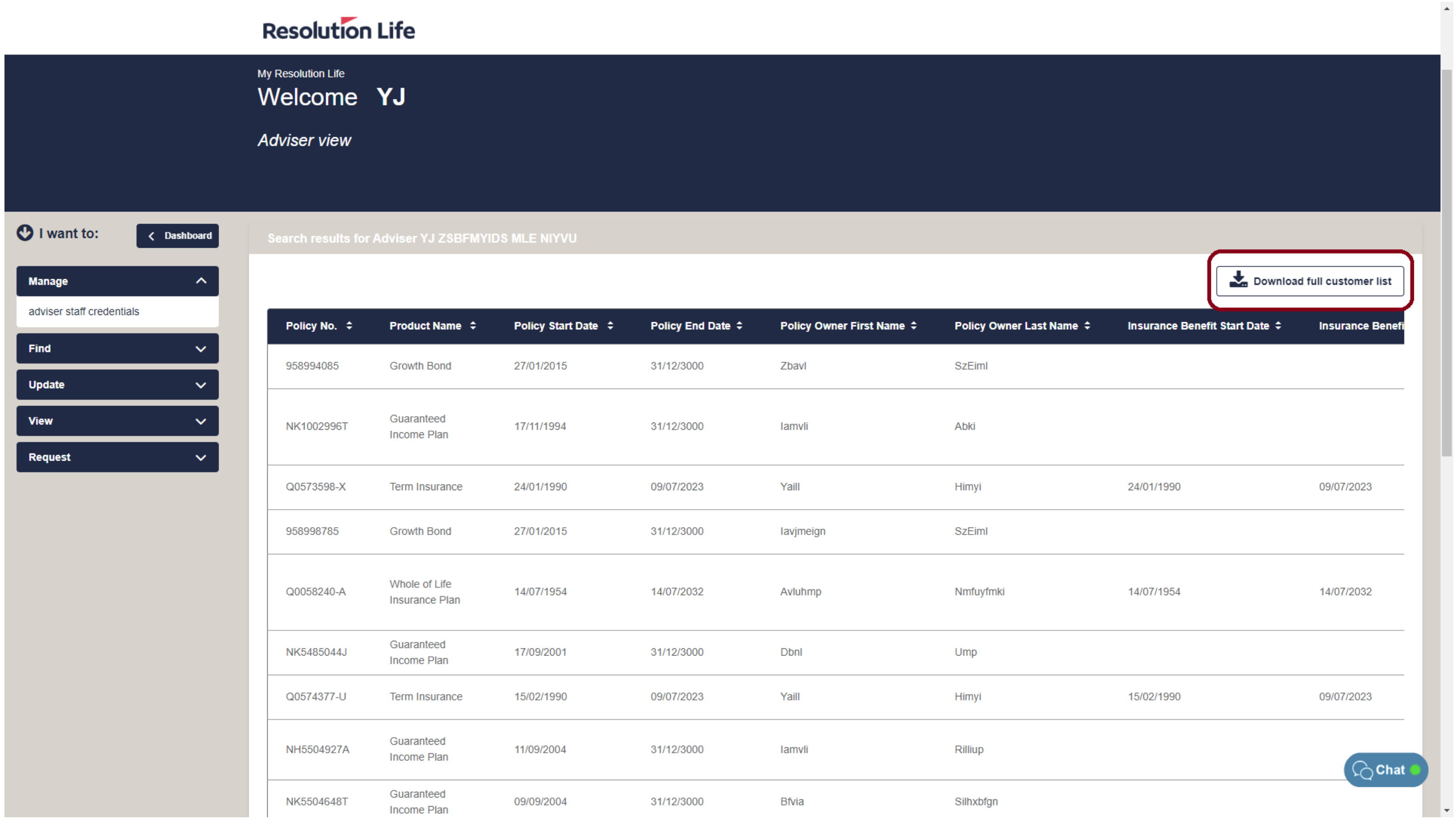


View all customers / Client Listing Report (2 of 3)

A list of all Customers associated with the account will display.

The list can be sorted by the following fields:

- Policy No.
- Product Name
- Policy Start Date
- Policy Owner First Name / Last Name
- Insurance Benefit Start Date / End Date
- Annual Policy Premium
- Ongoing Commission %
- Address / Suburb / State / Post Code
- Adviser Name / Owner No. / Sales No.



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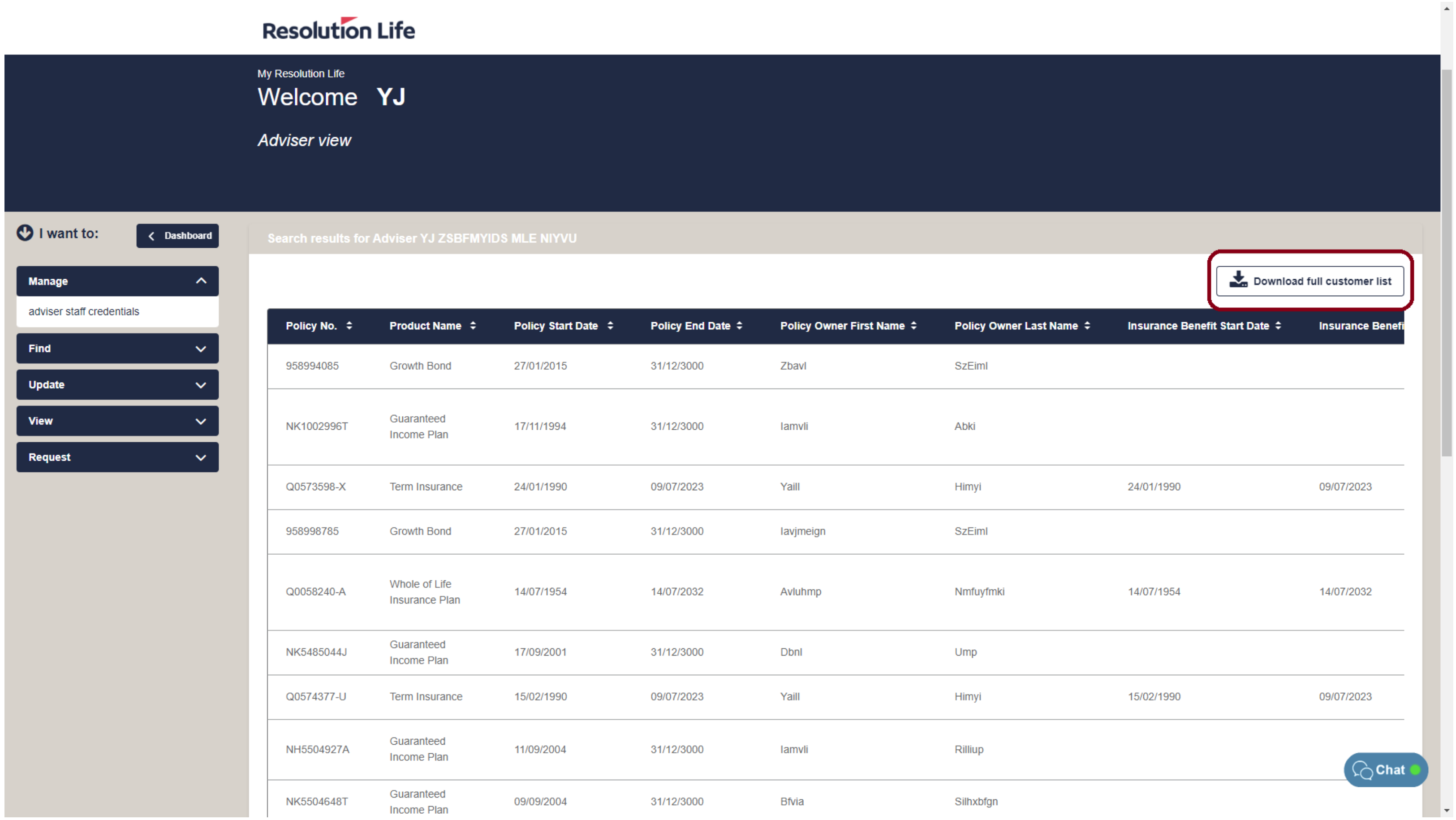
View all customers / Client Listing Report (3 of 3)

To download a CSV file of the customer list:

- Select **[Download full customer list]**



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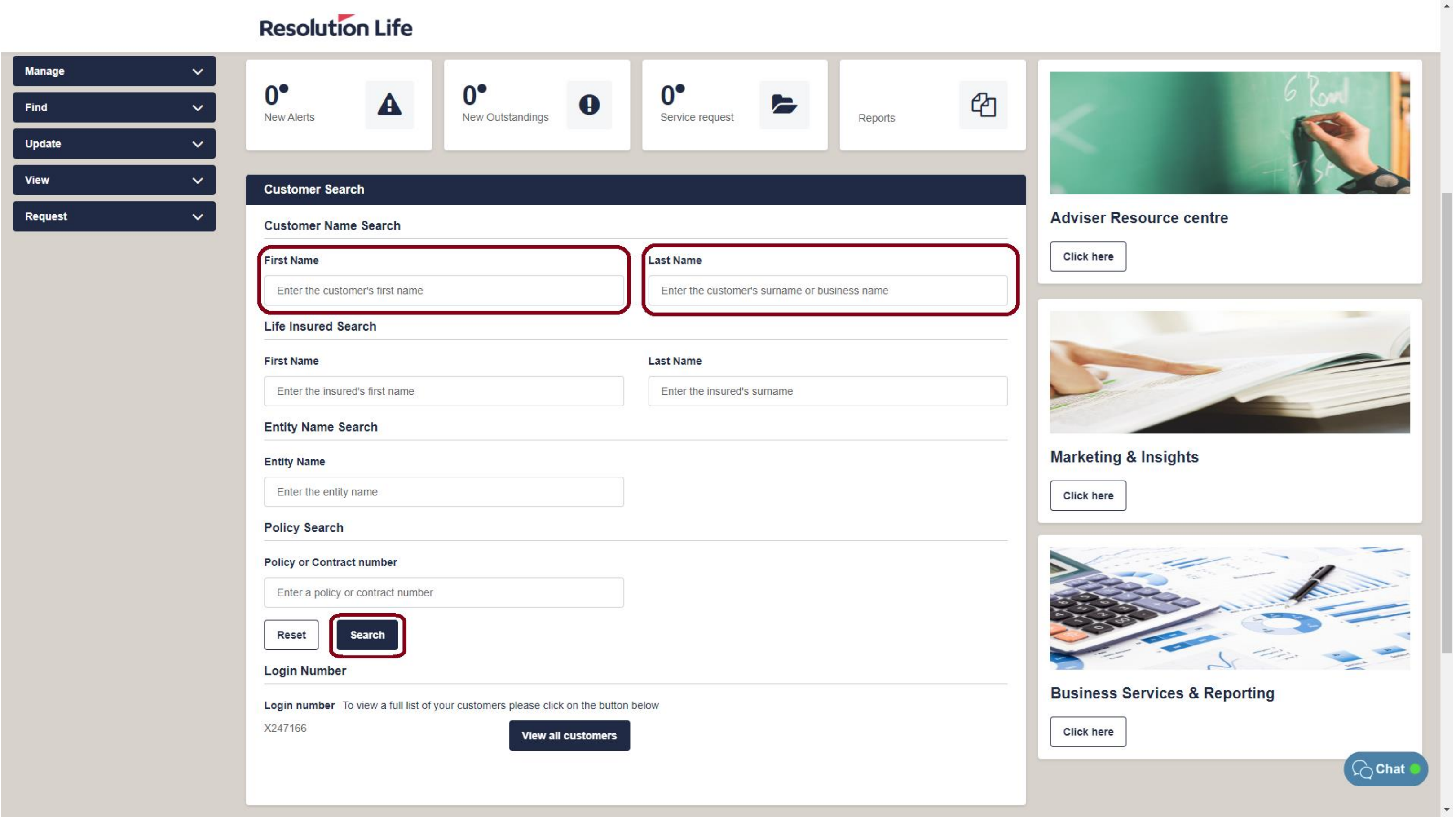
Search by customer name (1 of 2)

From the Customer Search screen on the home dashboard:

- Select **[First Name]** field and type customer's first name
- Select **[Last Name]** field and type customer's last name
- Select **[Search]**



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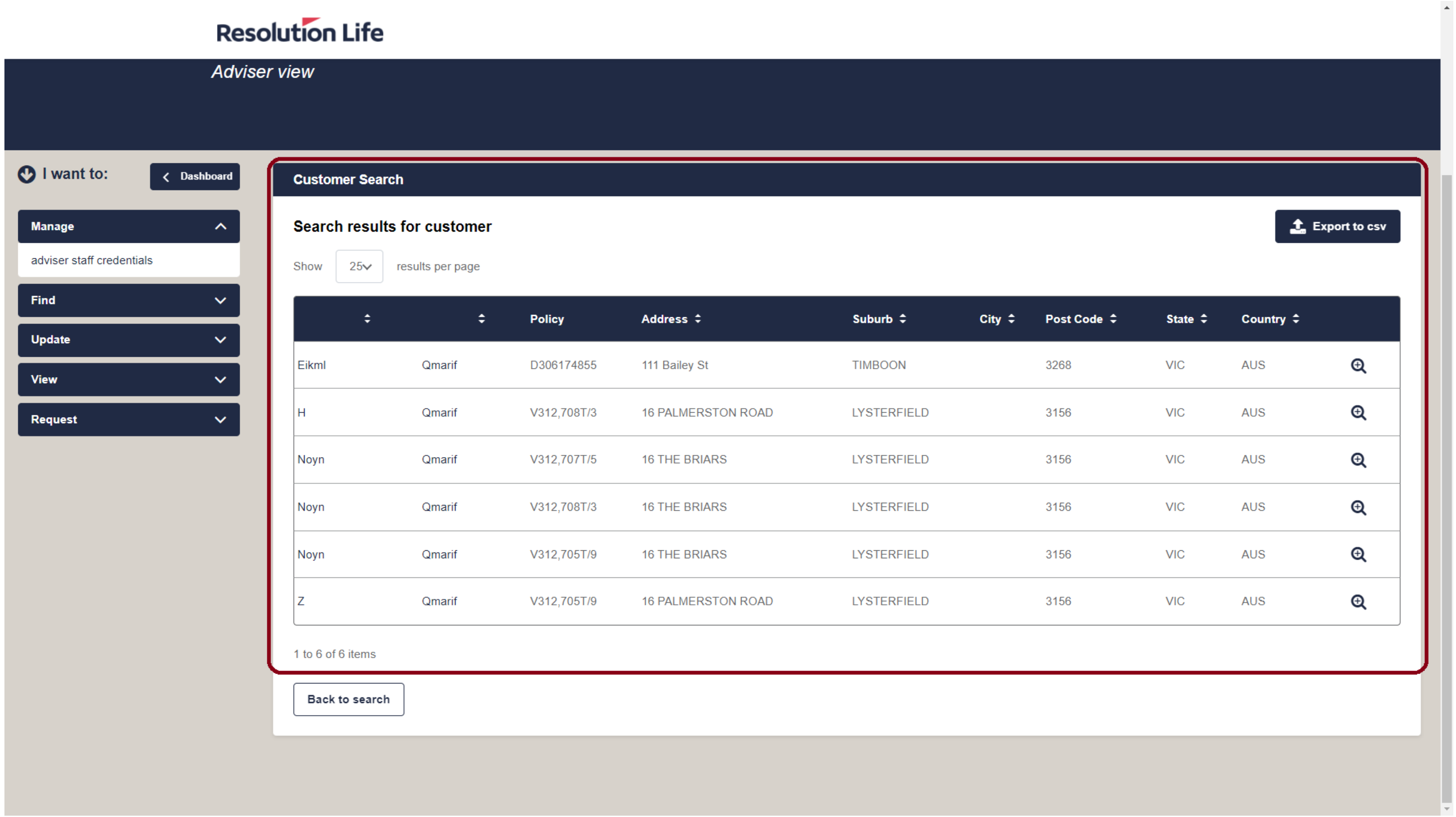
Search by customer name (2 of 2)

A list of matching search results will be displayed as per illustration.



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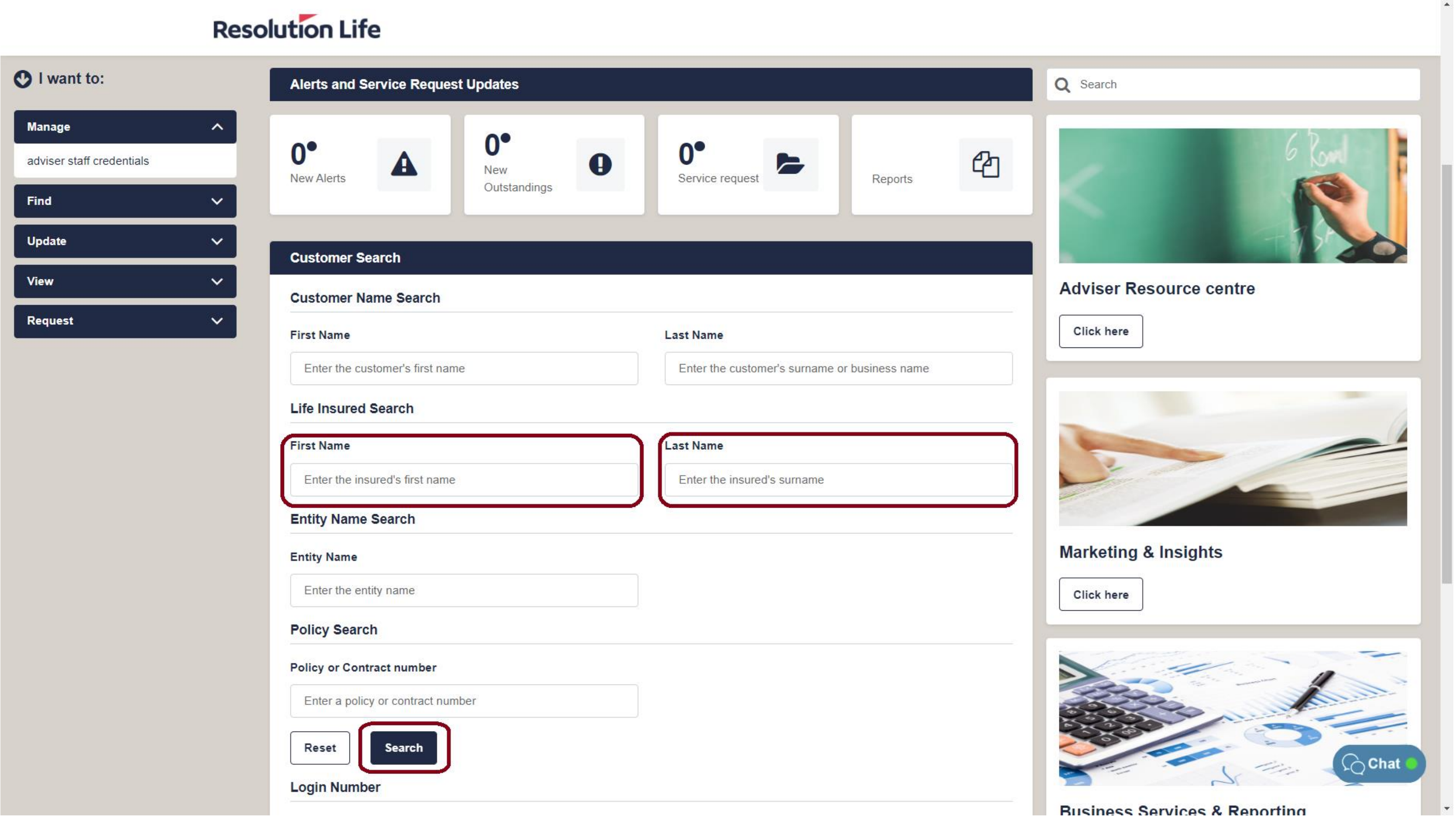
Search by life insured (1 of 2)

From the Life Insured Search section of the Customer Search dashboard:

- Select **[First Name]** field and type life insured's first name
- Select **[Last Name]** field and type life insured's last name
- Select **[Search]**



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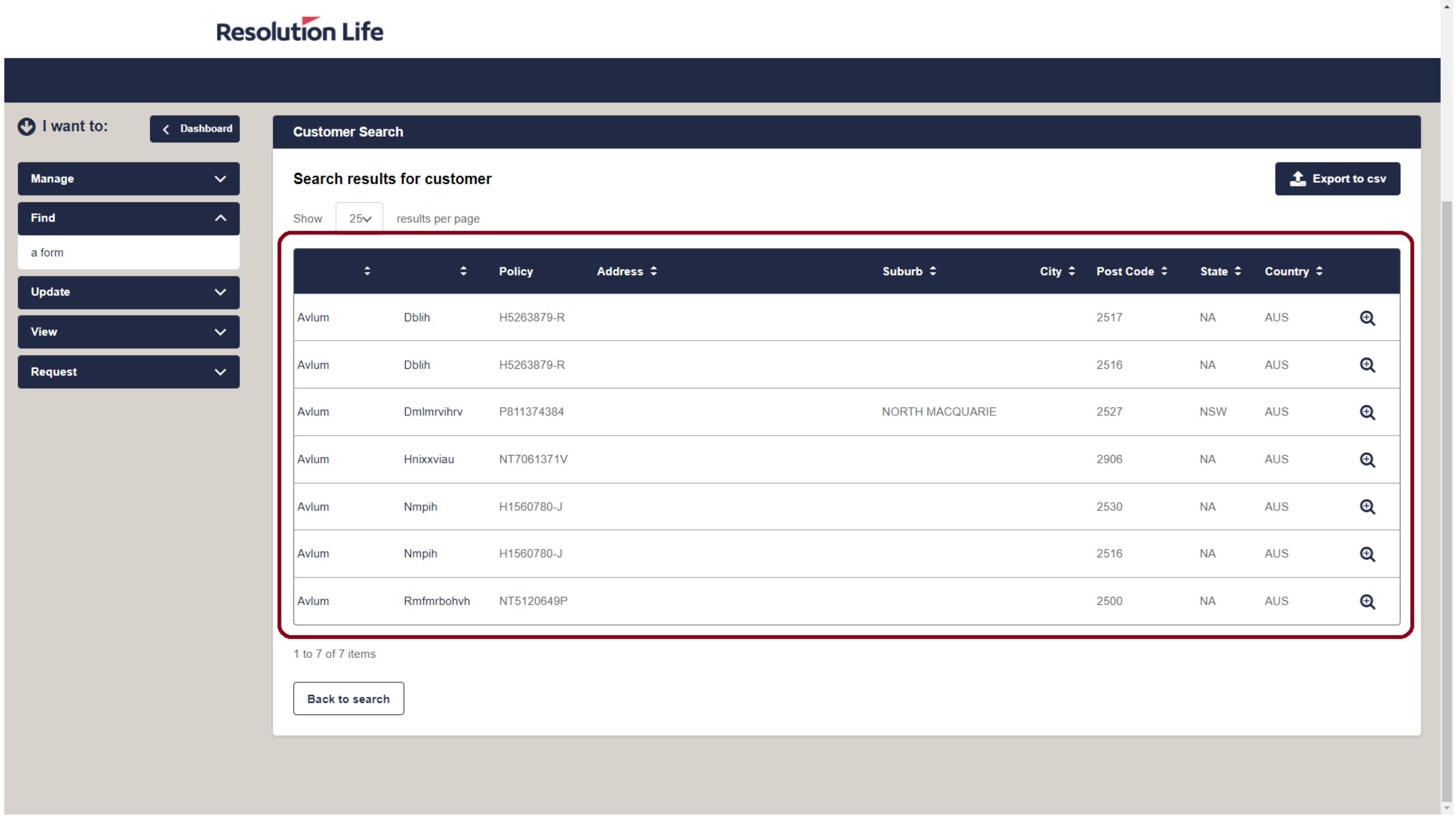
Search by life insured (2 of 2)

A list of matching search results will be displayed as per illustration.



		Policy	Address	Suburb	City	Post Code	State	Country
Avlum	Dblih	H5263879-R				2517	NA	AUS
Avlum	Dblih	H5263879-R				2516	NA	AUS
Avlum	Dmlmrvihrv	P811374384		NORTH MACQUARIE		2527	NSW	AUS
Avlum	Hnixxviau	NT7061371V				2906	NA	AUS
Avlum	Nmpih	H1560780-J				2530	NA	AUS
Avlum	Nmpih	H1560780-J				2516	NA	AUS
Avlum	Rmfmrbohvh	NT5120649P				2500	NA	AUS

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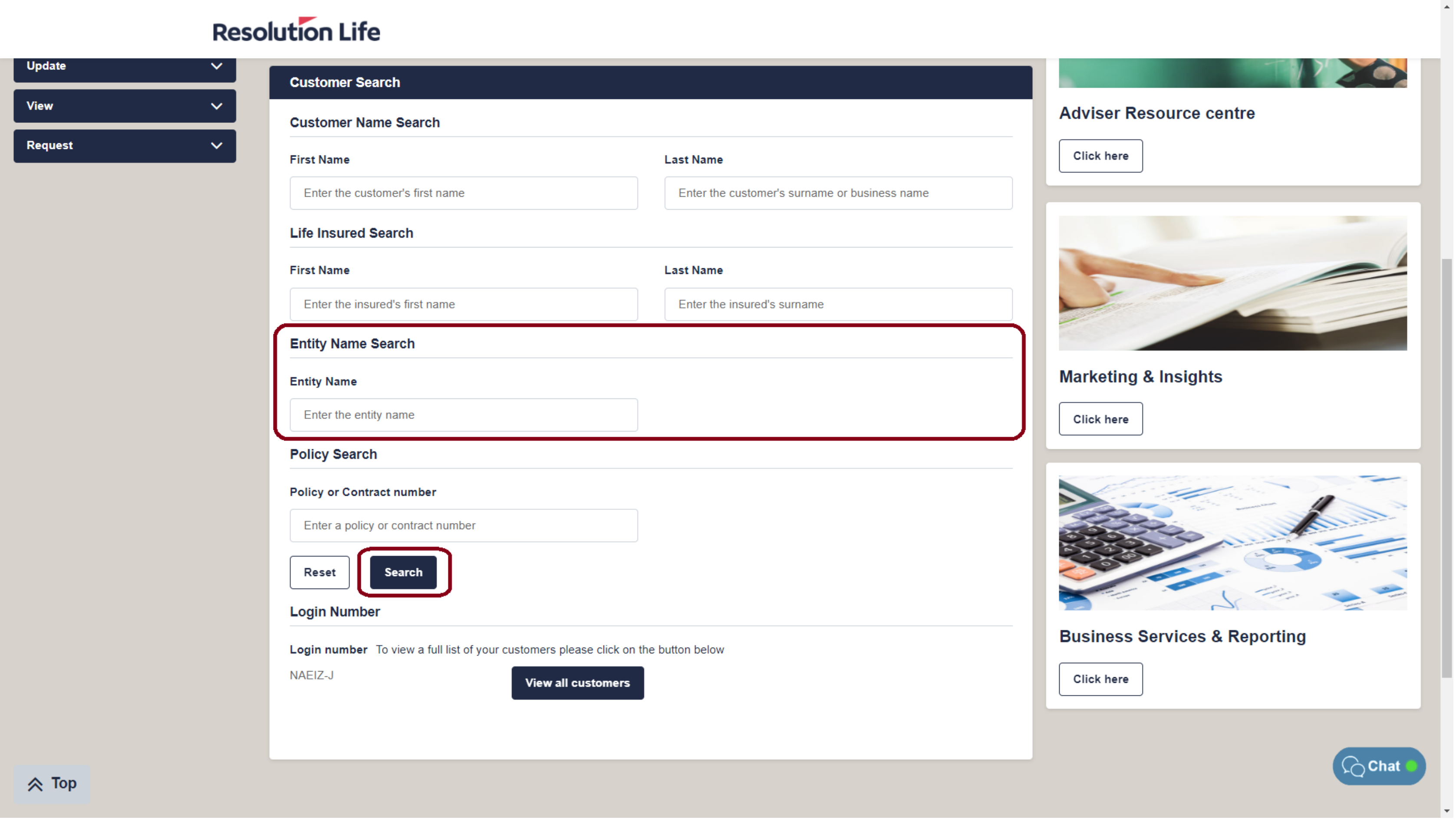
Search by entity name (1 of 2)

From the Entity Name Search section of the Customer Search dashboard:

- Select **[Entity Name]** field and type name of entity.
- Select **[Search]**



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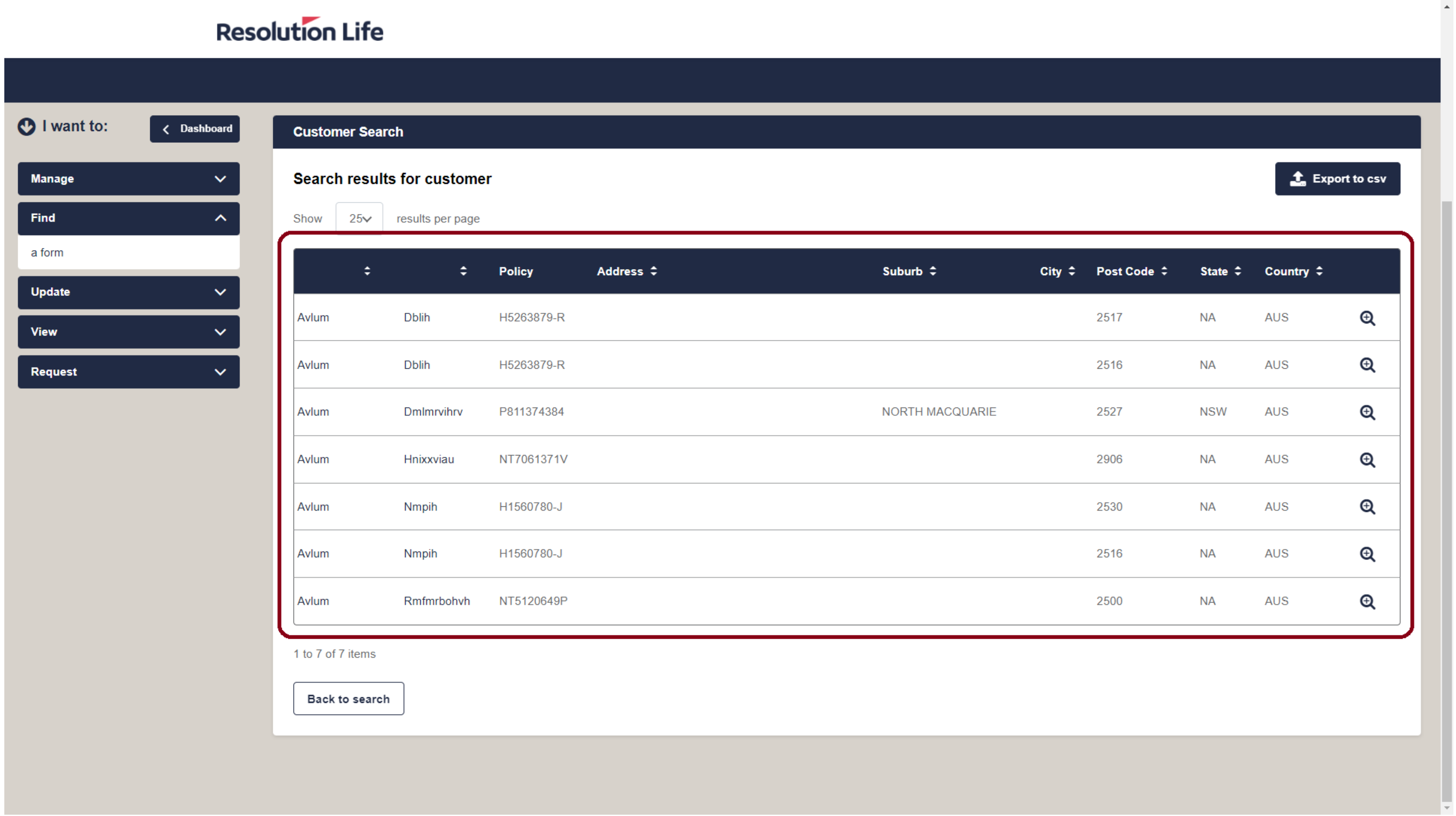
Search by entity name (2 of 2)

A list of matching search results will be displayed as per illustration.



		Policy	Address	Suburb	City	Post Code	State	Country	
Avlum	Dblih	H5263879-R				2517	NA	AUS	
Avlum	Dblih	H5263879-R				2516	NA	AUS	
Avlum	Dmlmrvihrv	P811374384		NORTH MACQUARIE		2527	NSW	AUS	
Avlum	Hnixxviau	NT7061371V				2906	NA	AUS	
Avlum	Nmpih	H1560780-J				2530	NA	AUS	
Avlum	Nmpih	H1560780-J				2516	NA	AUS	
Avlum	Rmfmrbohvh	NT5120649P				2500	NA	AUS	

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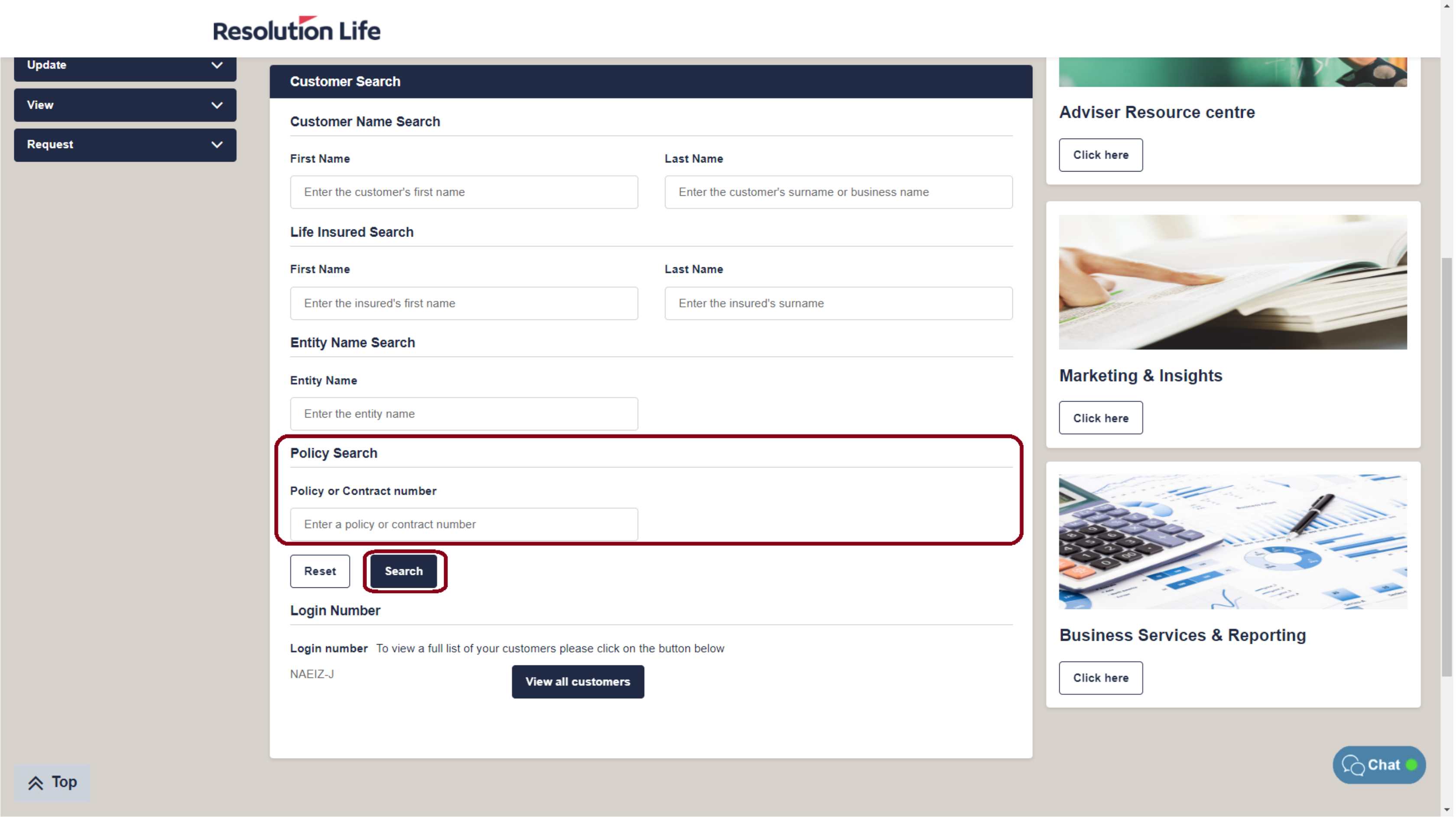
Search by policy (1 of 2)

From the Policy Search section of the Customer Search dashboard:

- Select **[Policy or Contract number]** field and type details
- Select **[Search]**



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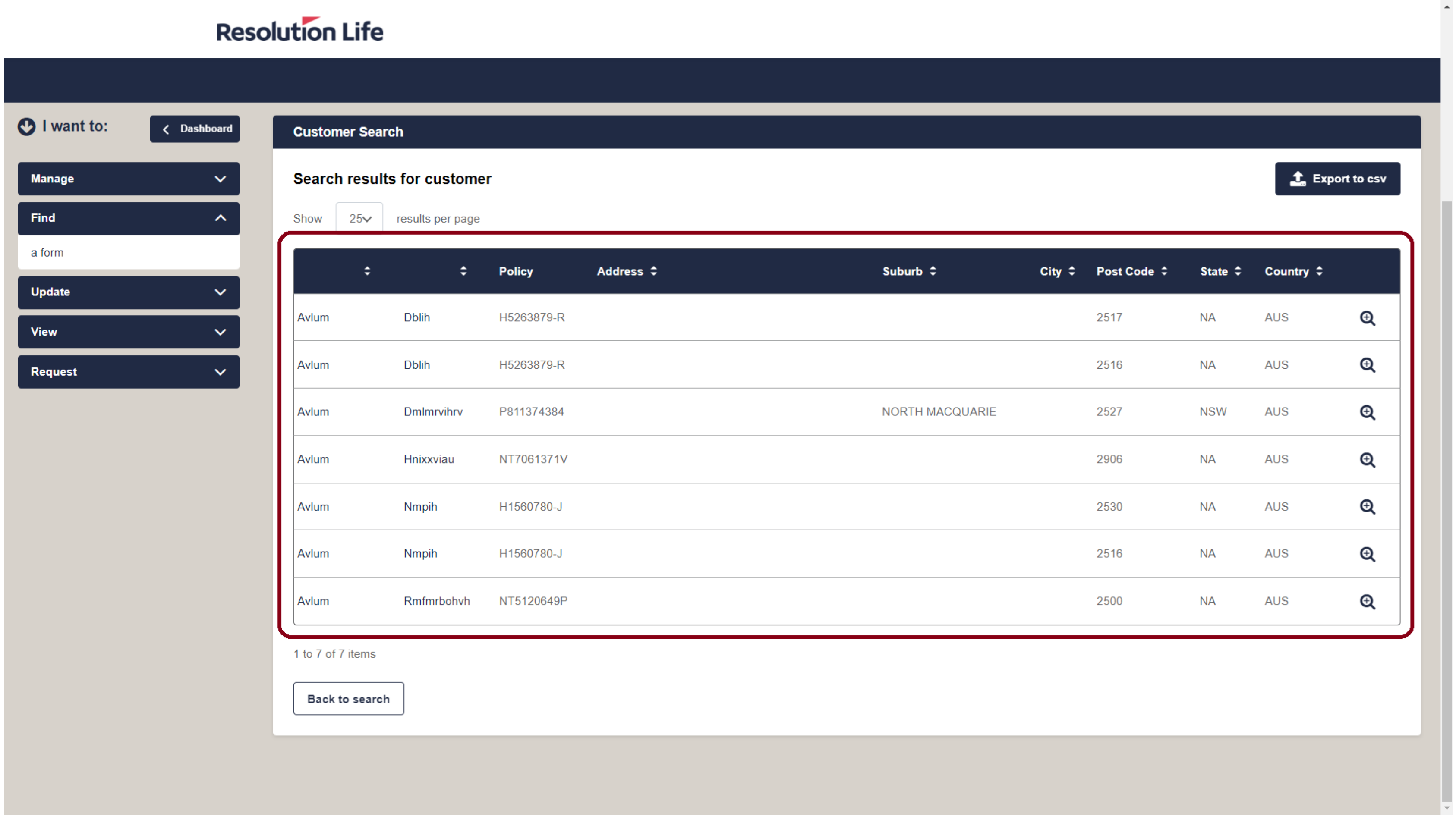
Search by policy (2 of 2)

A list of matching search results will be displayed as per illustration.



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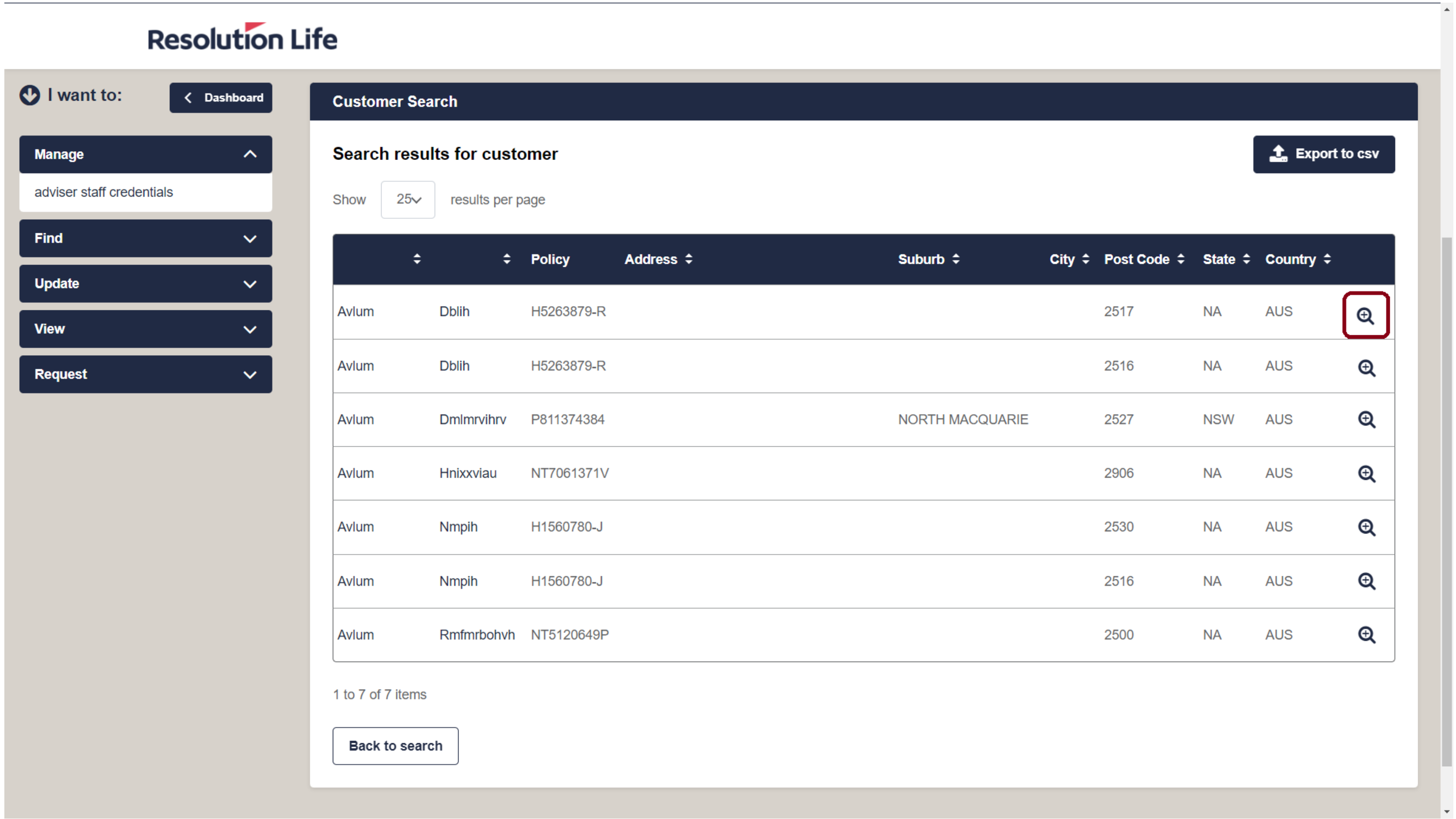
View customer (1 of 2)

From the displayed list of Customer Search results:

- Select the view icon



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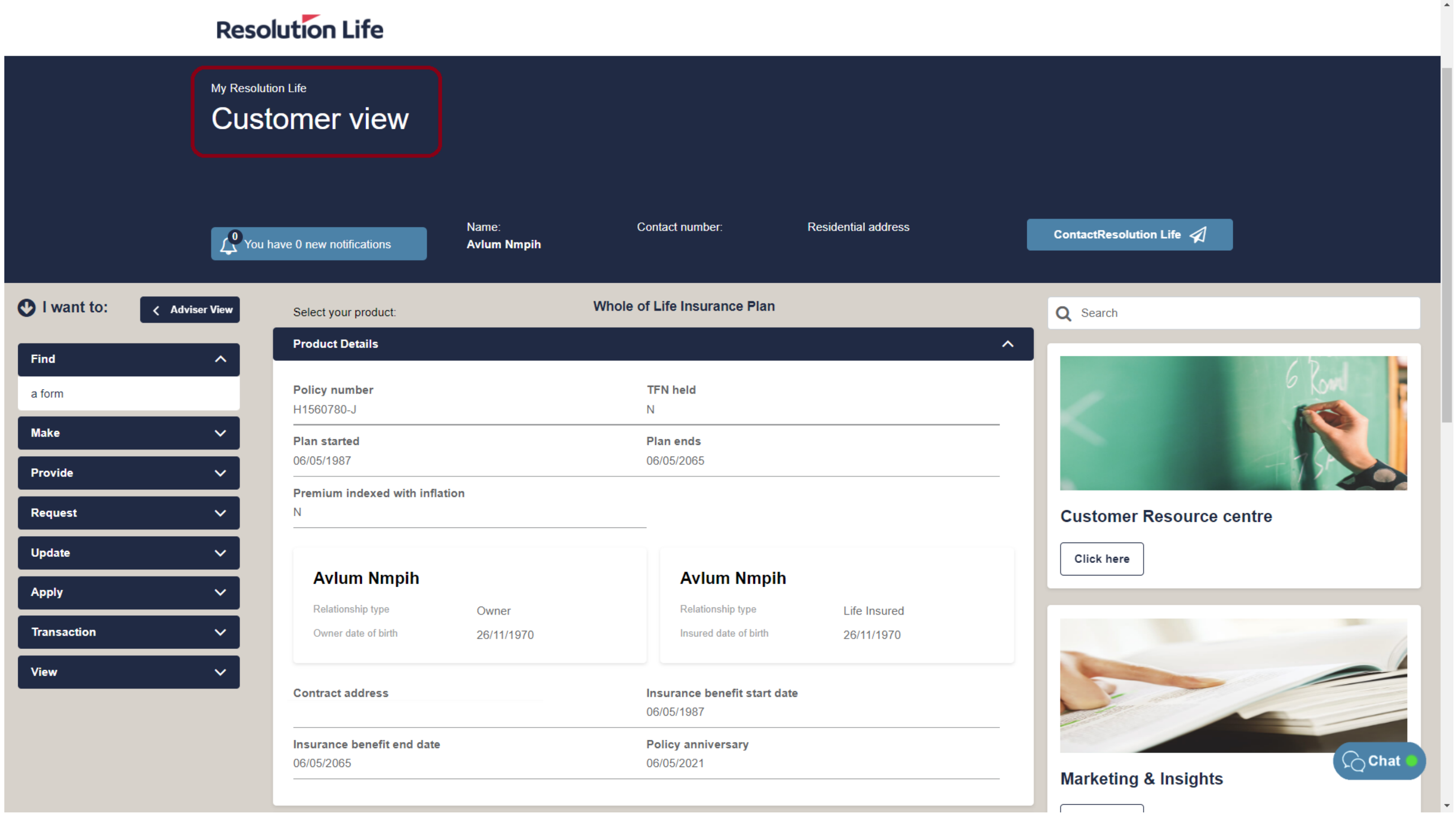
View customer (2 of 2)

Customer view will open on My Resolution Life.

Customer view allows you to see the customer’s insurance details, contact details, notifications, and tailored options available to the customer based on the product(s) they hold.



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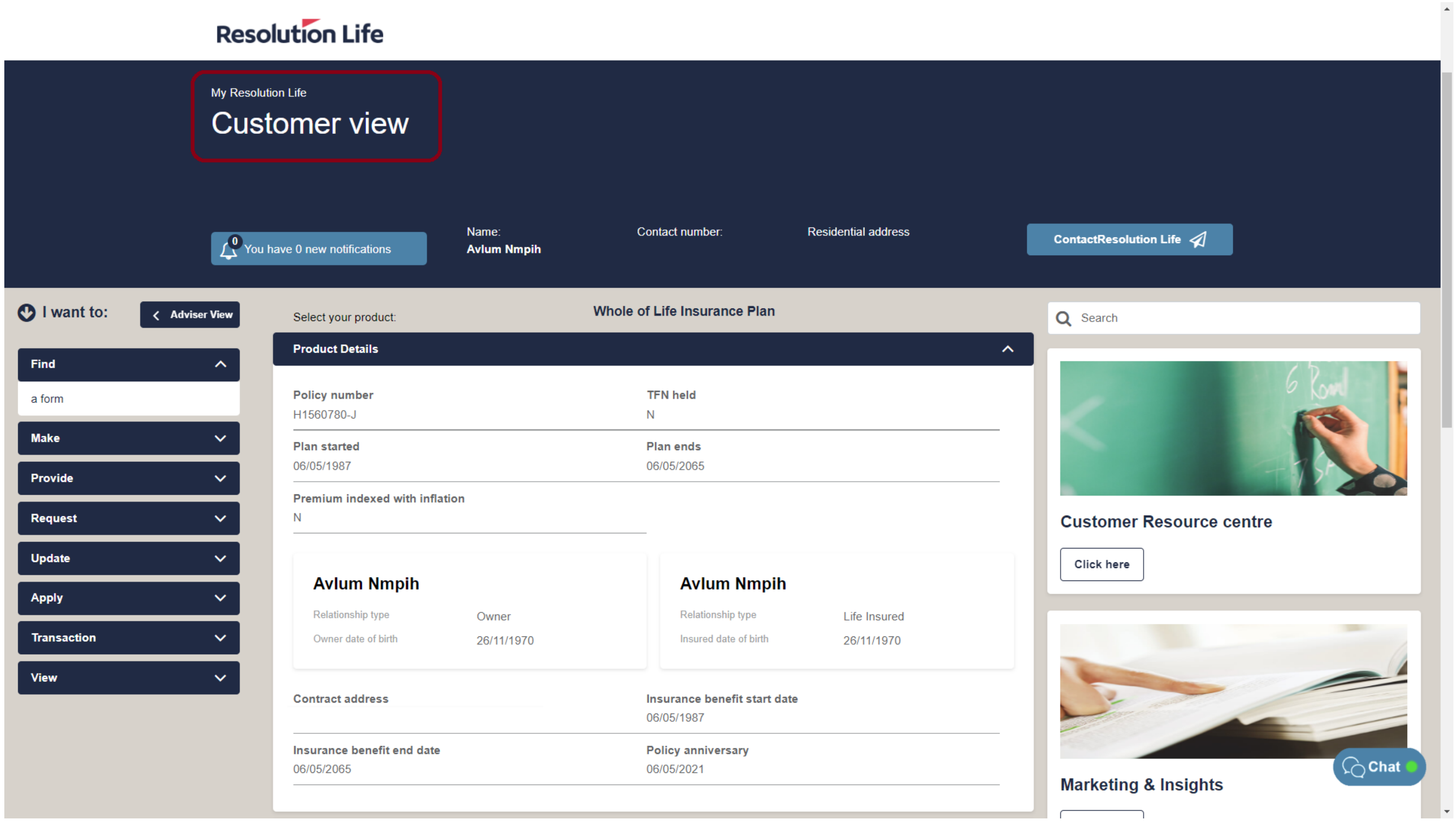
Customer view – Key info (1 of 1)

- **Customer view** allows you to see the customer's insurance details, contact details, notifications, and tailored options available to the customer based on the product(s) they hold.

- **Customer view** mirrors what the customer can see when they login My Resolution Life (i.e. account information, personal details, notifications, etc.

- It is strongly recommend to use **Customer view** when searching for forms. All options in Customer view are specific to the individual customer.



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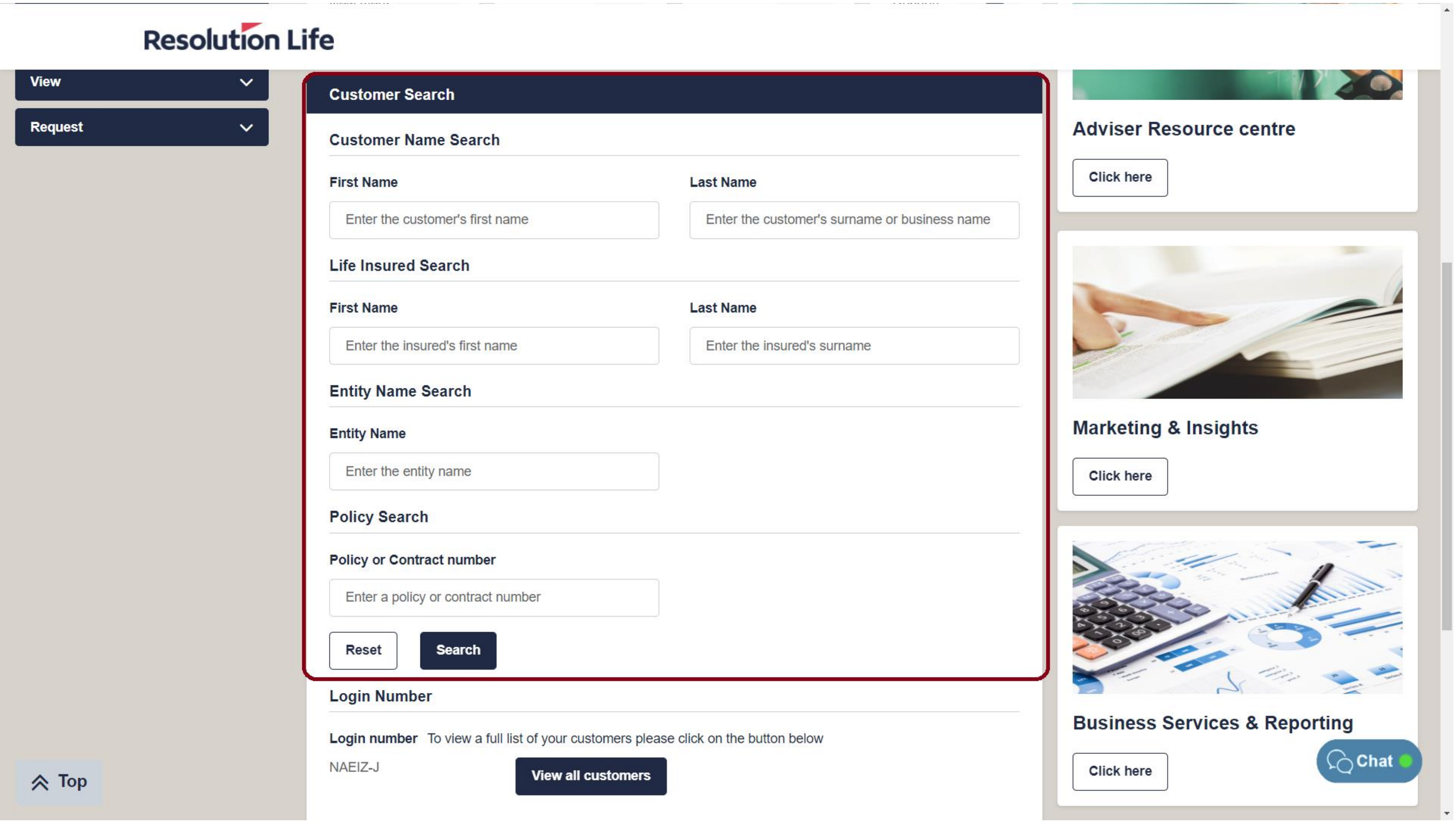
Access Customer view (1 of 3)

Using the Customer Search function on the home dashboard:

- Search for a customer using the available search options (detailed in this guide)



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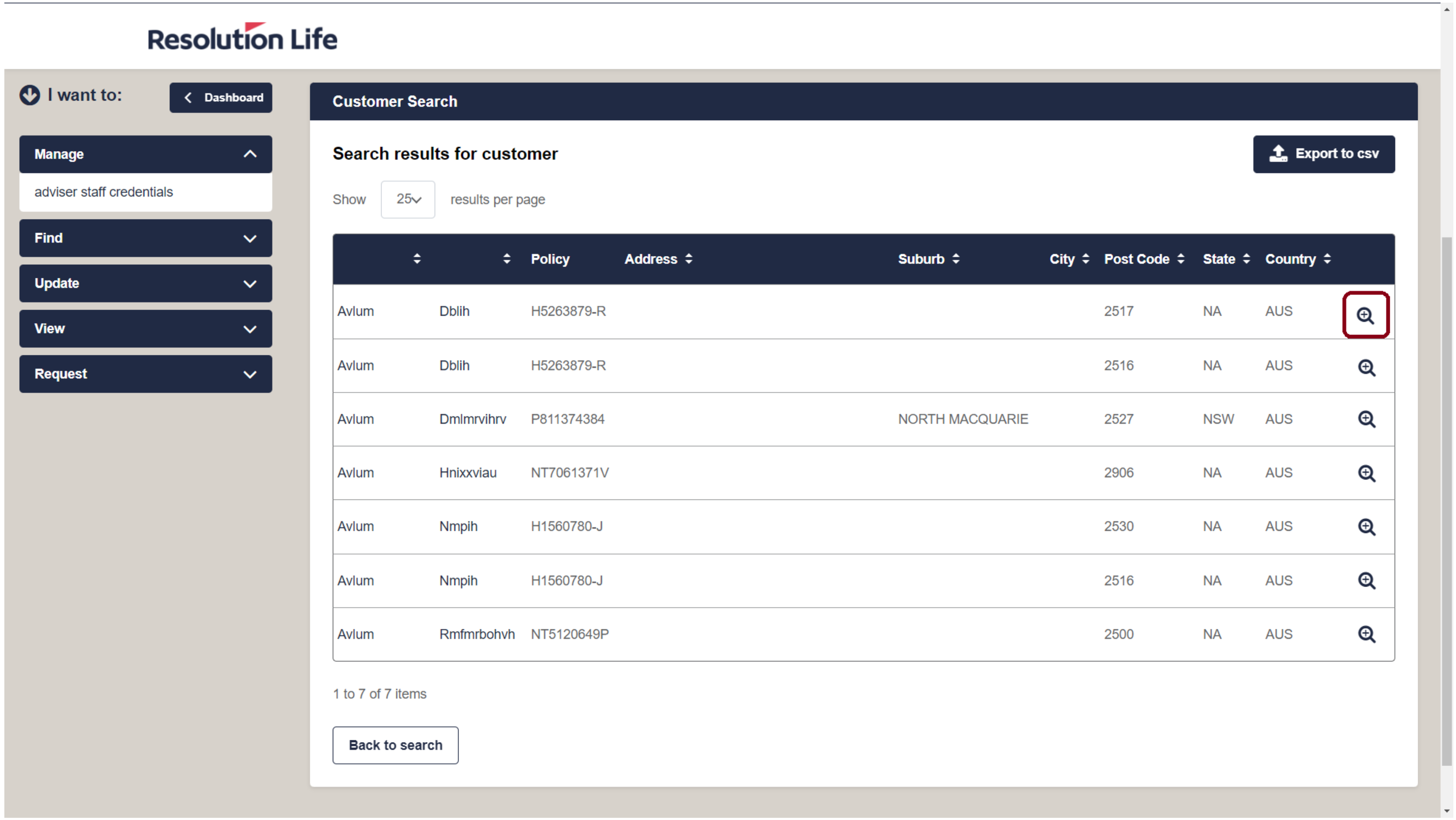
Resolution Life

Access Customer view (2 of 3)

From the displayed list of Customer Search results:

- Identify the correct customer record
- Select the **[View]** icon



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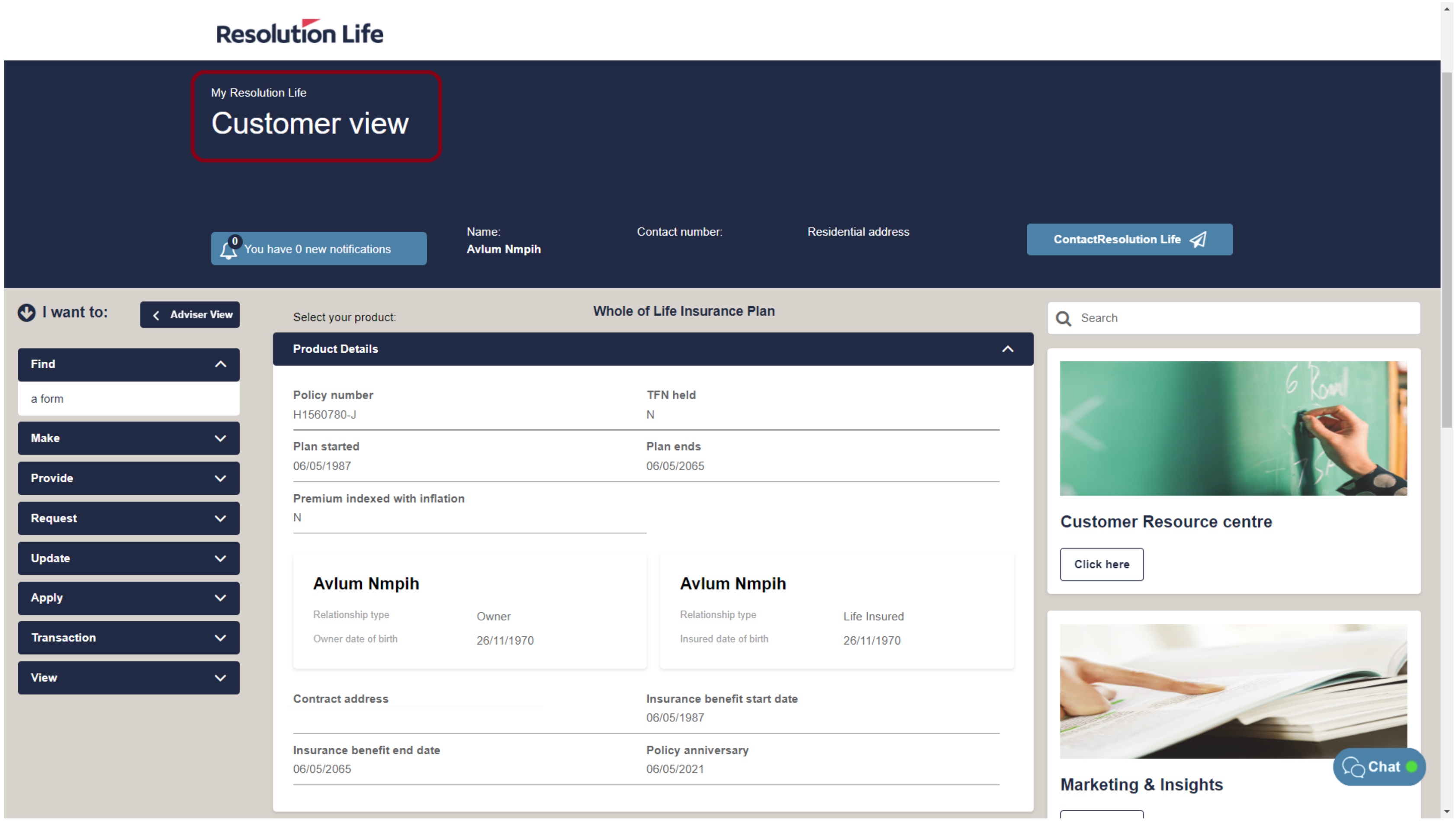
Access Customer view (3 of 3)

Customer view will open in My Resolution Life as per illustration.



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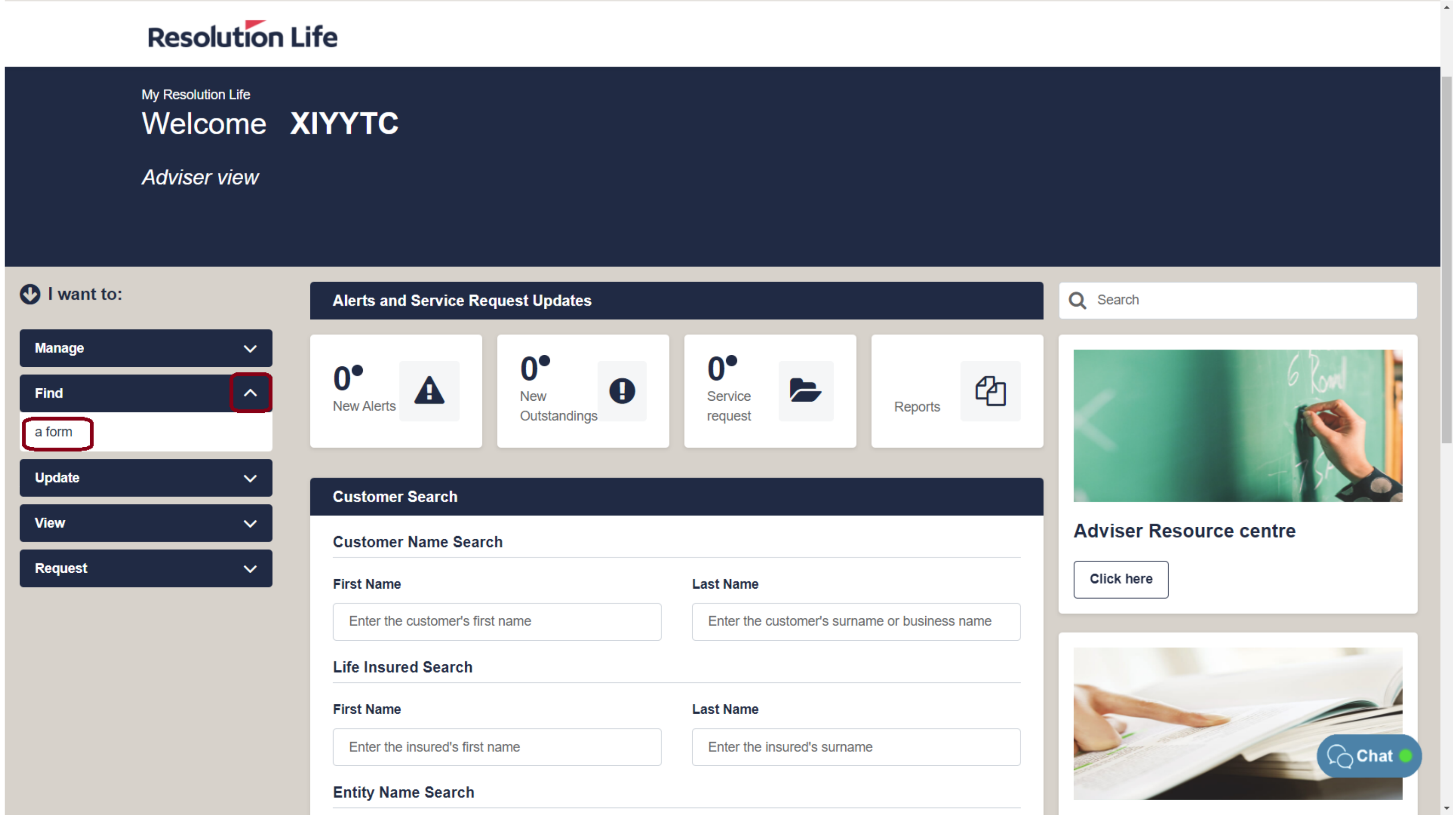
Find a form (1 of 4)

From the dashboard menu on the left of the screen:

- Select the drop-down icon on **Find**
- Select **[A Form]**



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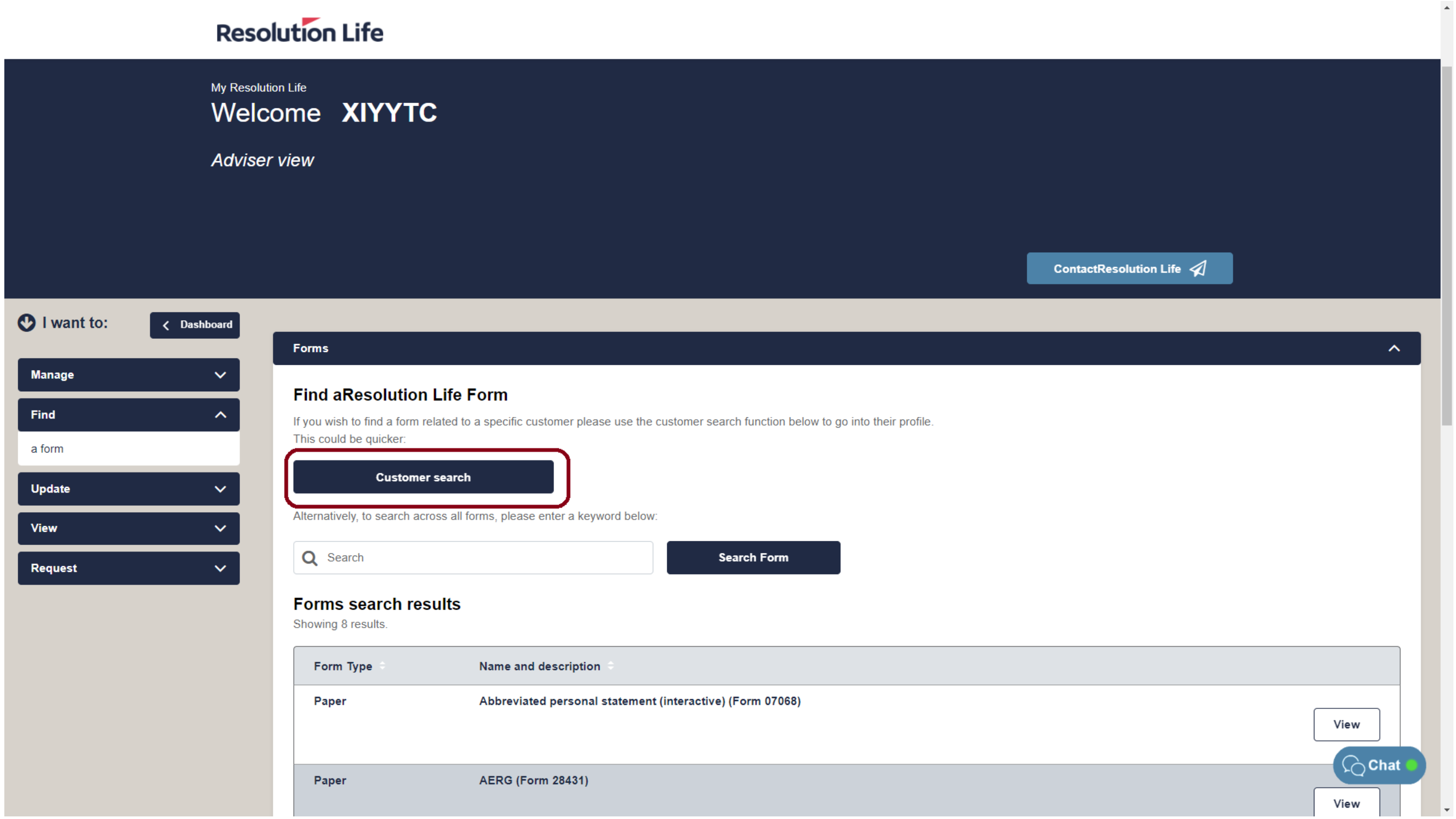
Find a form (2 of 4)

It is strongly recommended that Customer view is used when searching for forms.

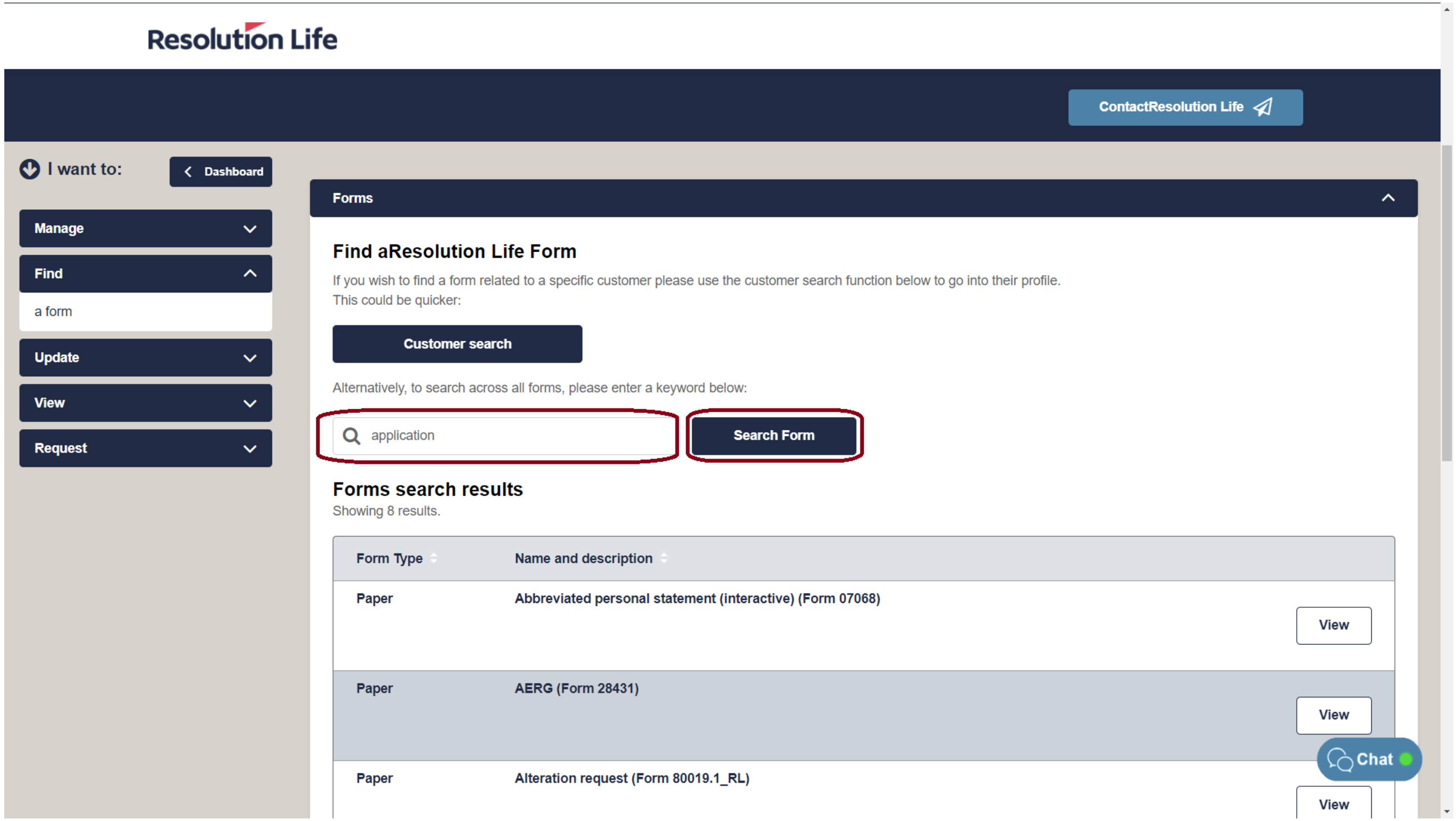
All options available in customer view are specific to the individual customer.



Find a form (3 of 4)

Alternatively:

- Select Search field
- Enter key word and select **[Search]**



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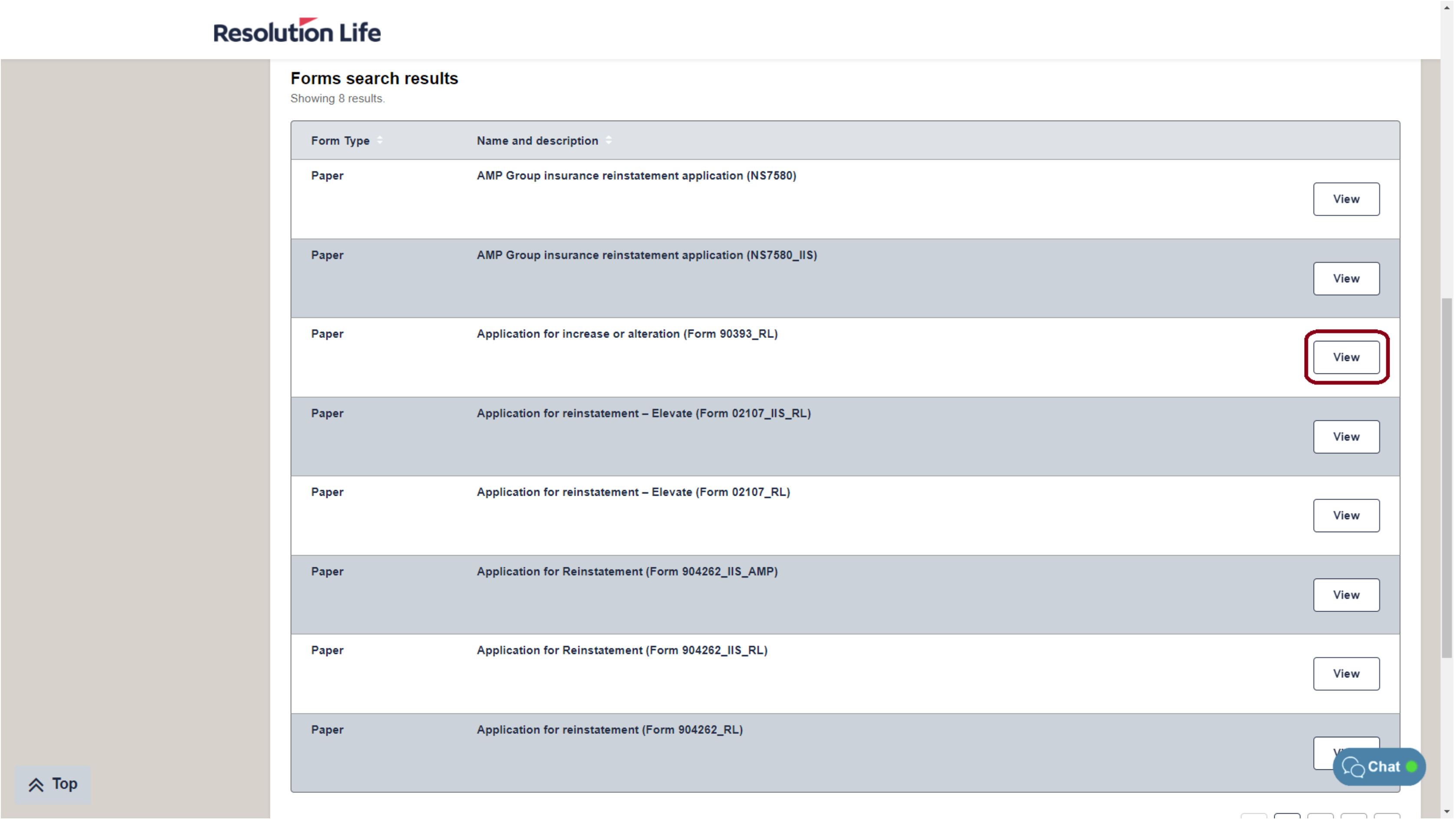
Find a form (4 of 4)

A list of matching search results will be displayed as per illustration.

Select **[View]** to download PDF.



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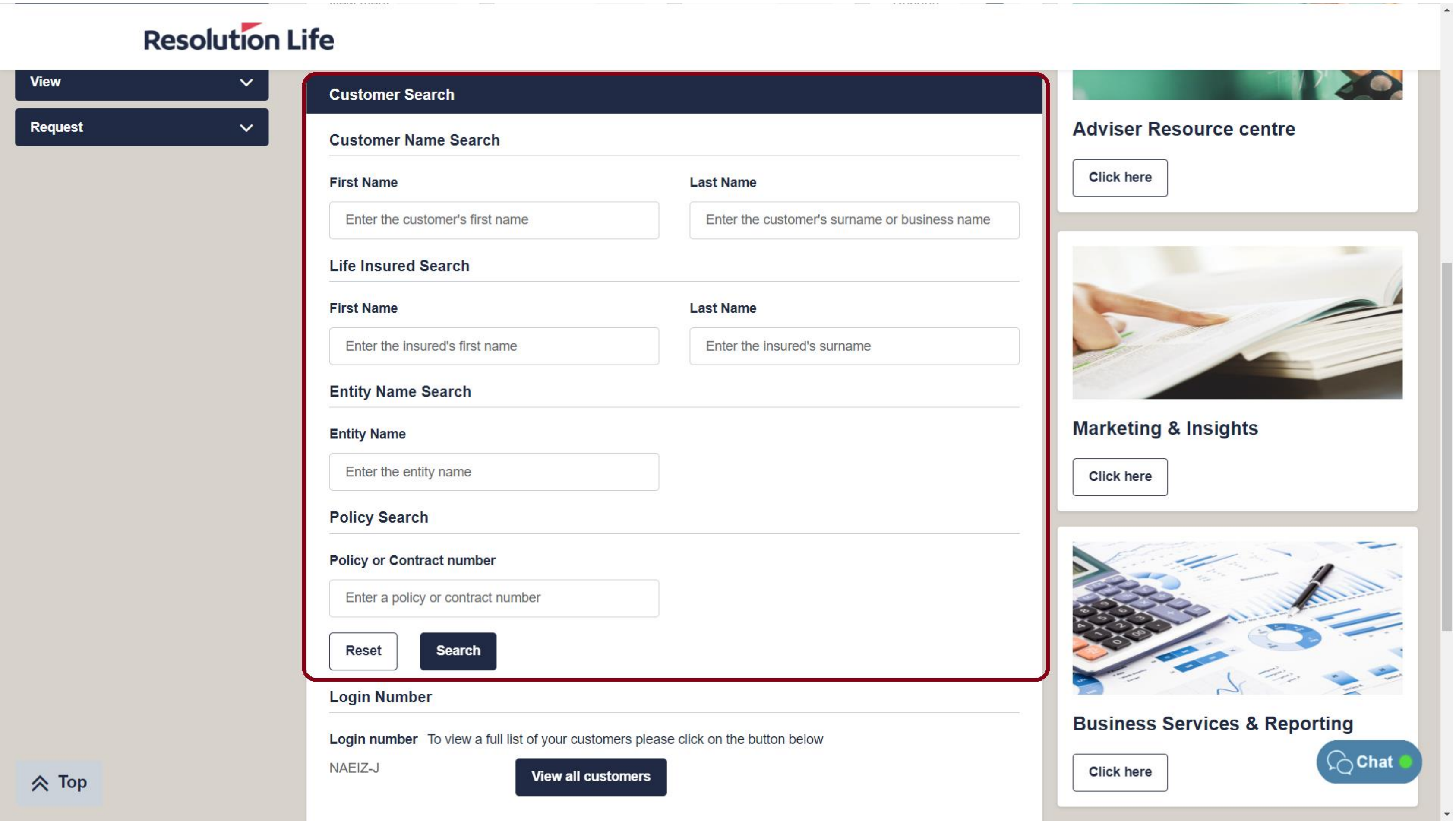
View transaction history (1 of 4)

Using the **Customer Search** function on the home dashboard:

- Search for a customer using the available search options (detailed here in this guide)



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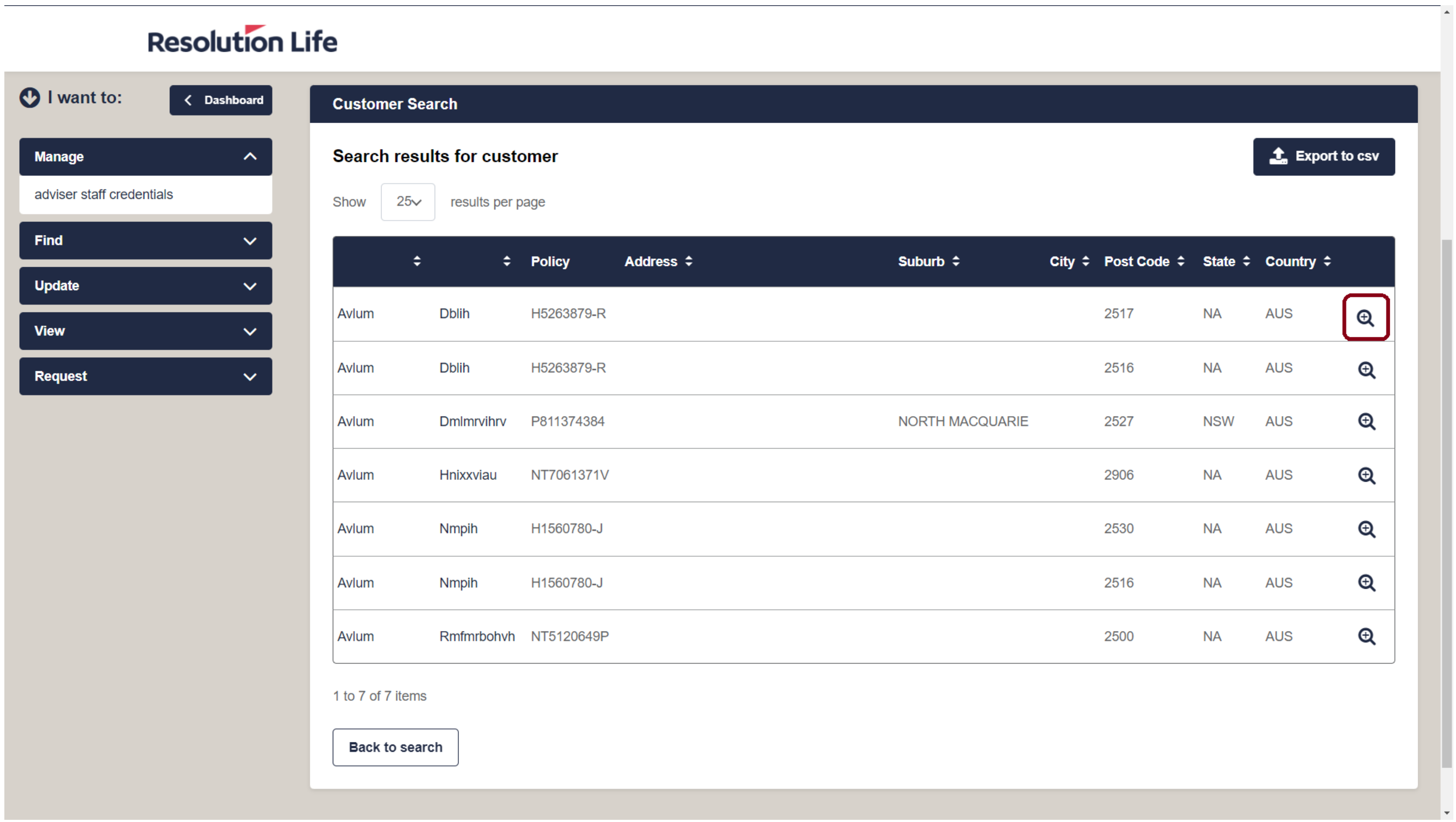
View transaction history (2 of 4)

From the displayed list of Customer Search results:

- Identify the correct customer record
- Select the **[View]** icon



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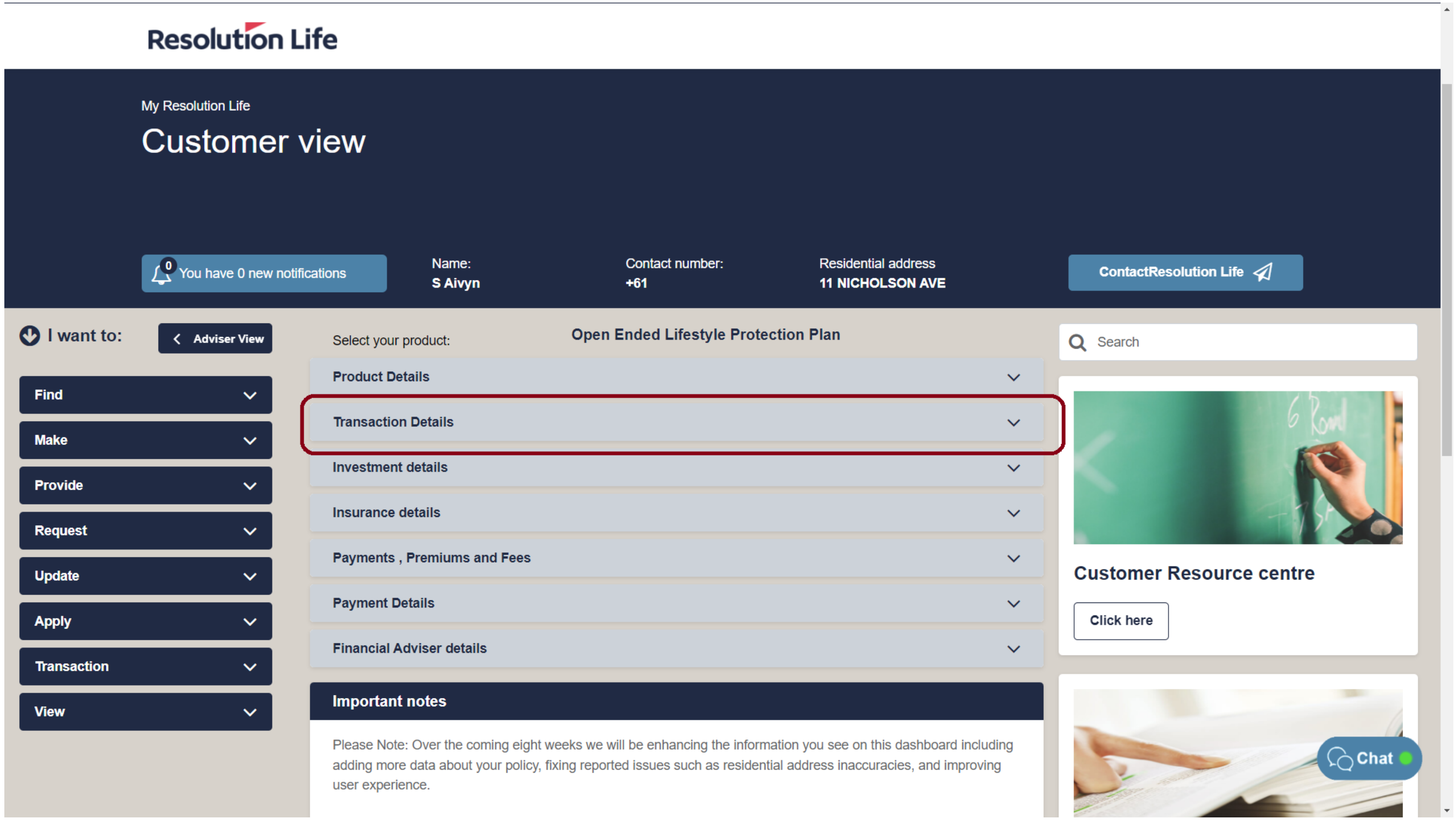
View transaction history (3 of 4)

Within **Customer view**:

From the cascading tabs in the middle of the screen:

- Select the drop-down icon on **Transaction Details**



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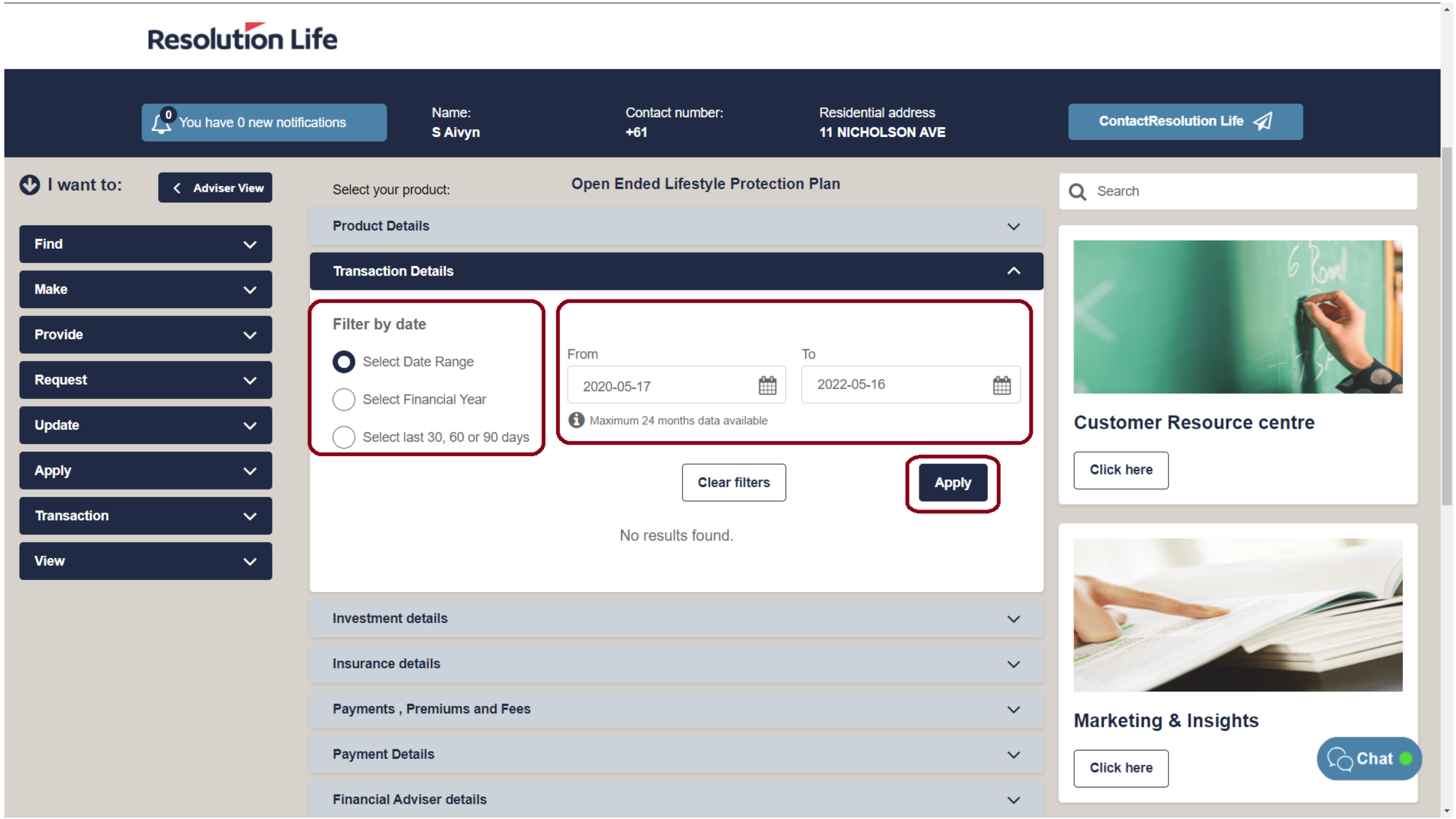
View transaction history (4 of 4)

- Use the radio buttons to filter by **Date Range**, **Financial Year**, or the **last 30, 60, or 90 days**
- Select **[Apply]**
- Results will display.



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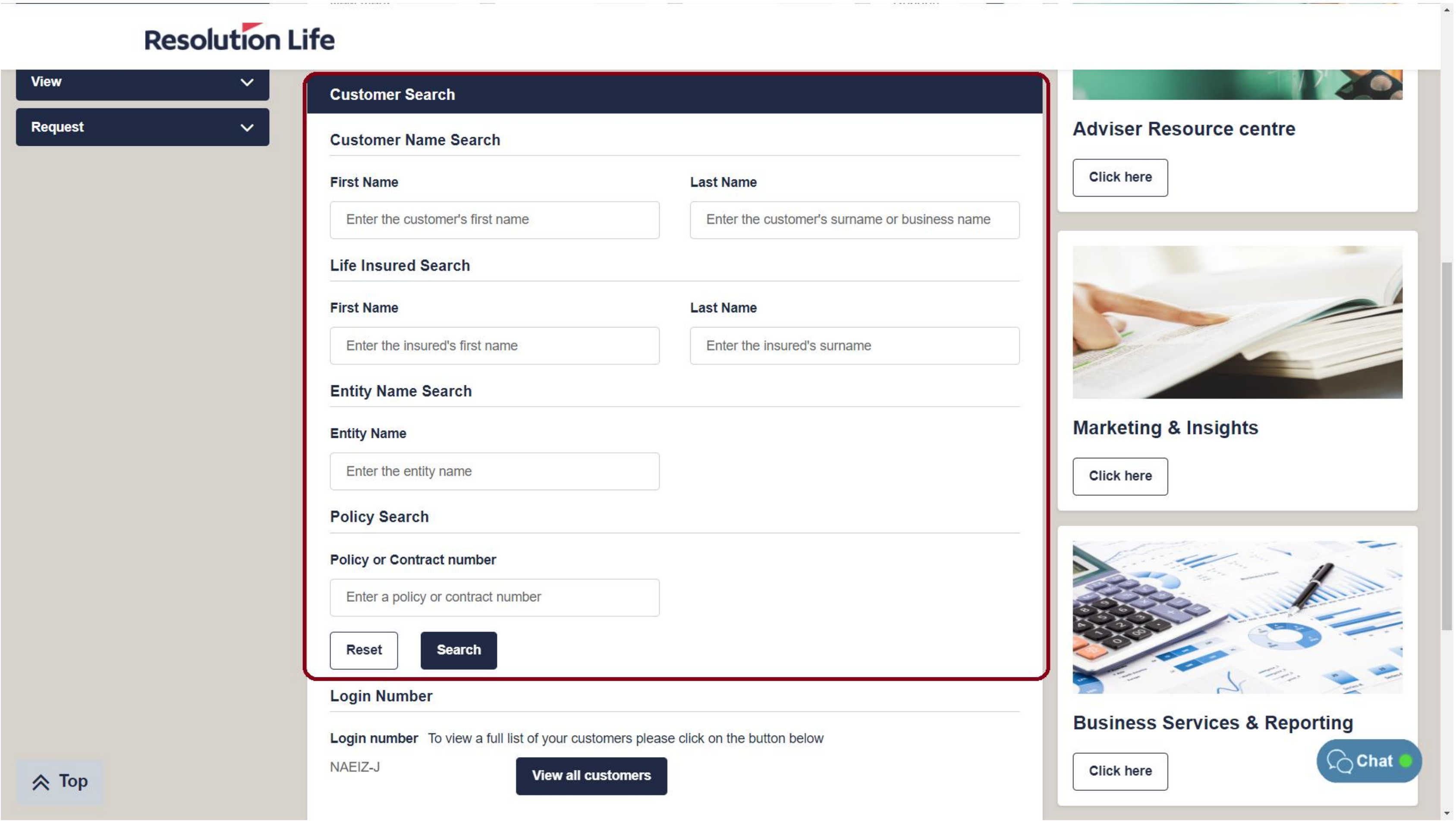
View customer notifications (1 of 3)

Using the Customer Search function on the home dashboard:

- Search for a customer using the available search options (detailed here in this guide)



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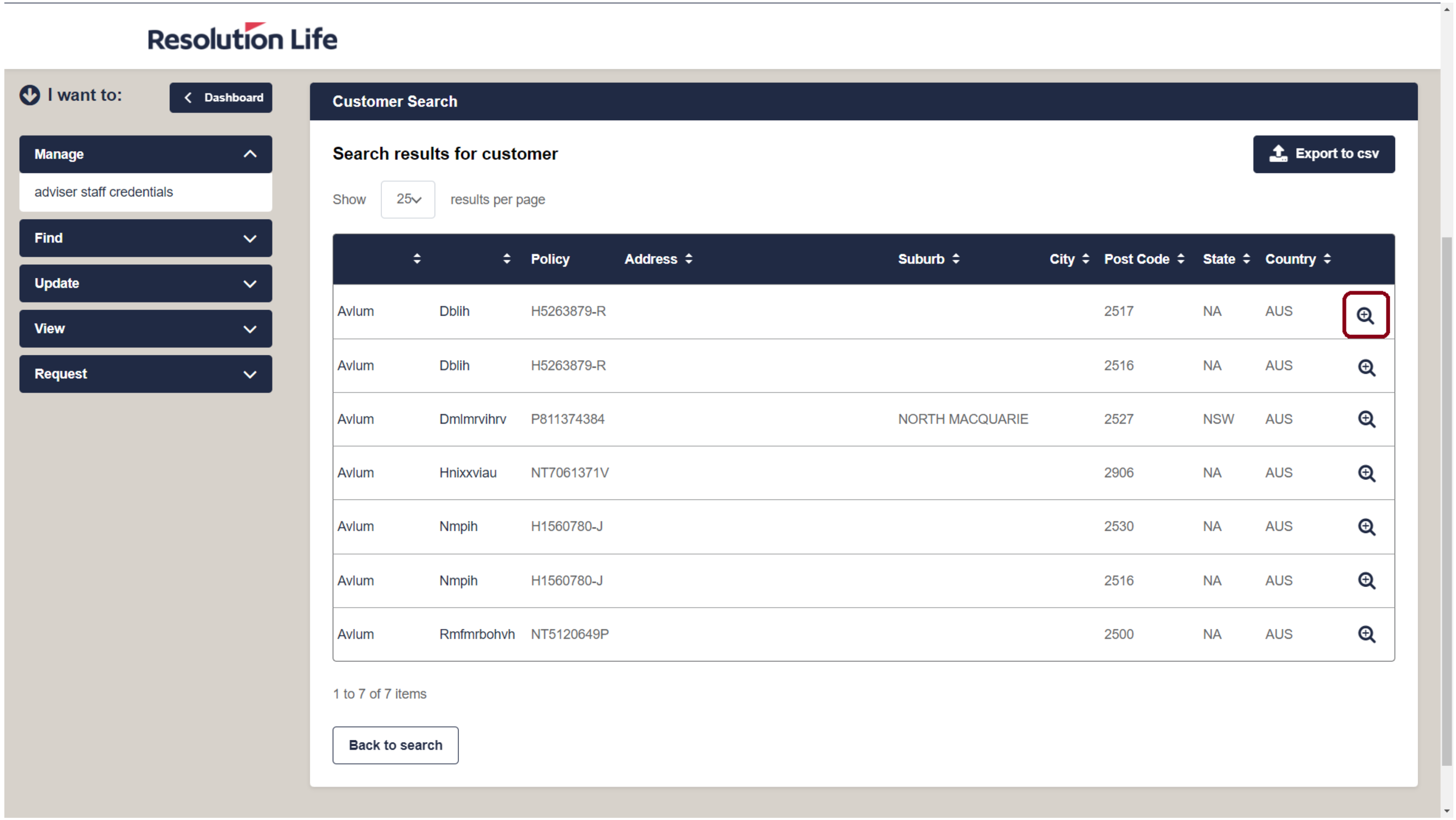
View customer notifications (2 of 3)

From the displayed list of Customer Search results:

- Identify the correct customer record
- Select the view icon



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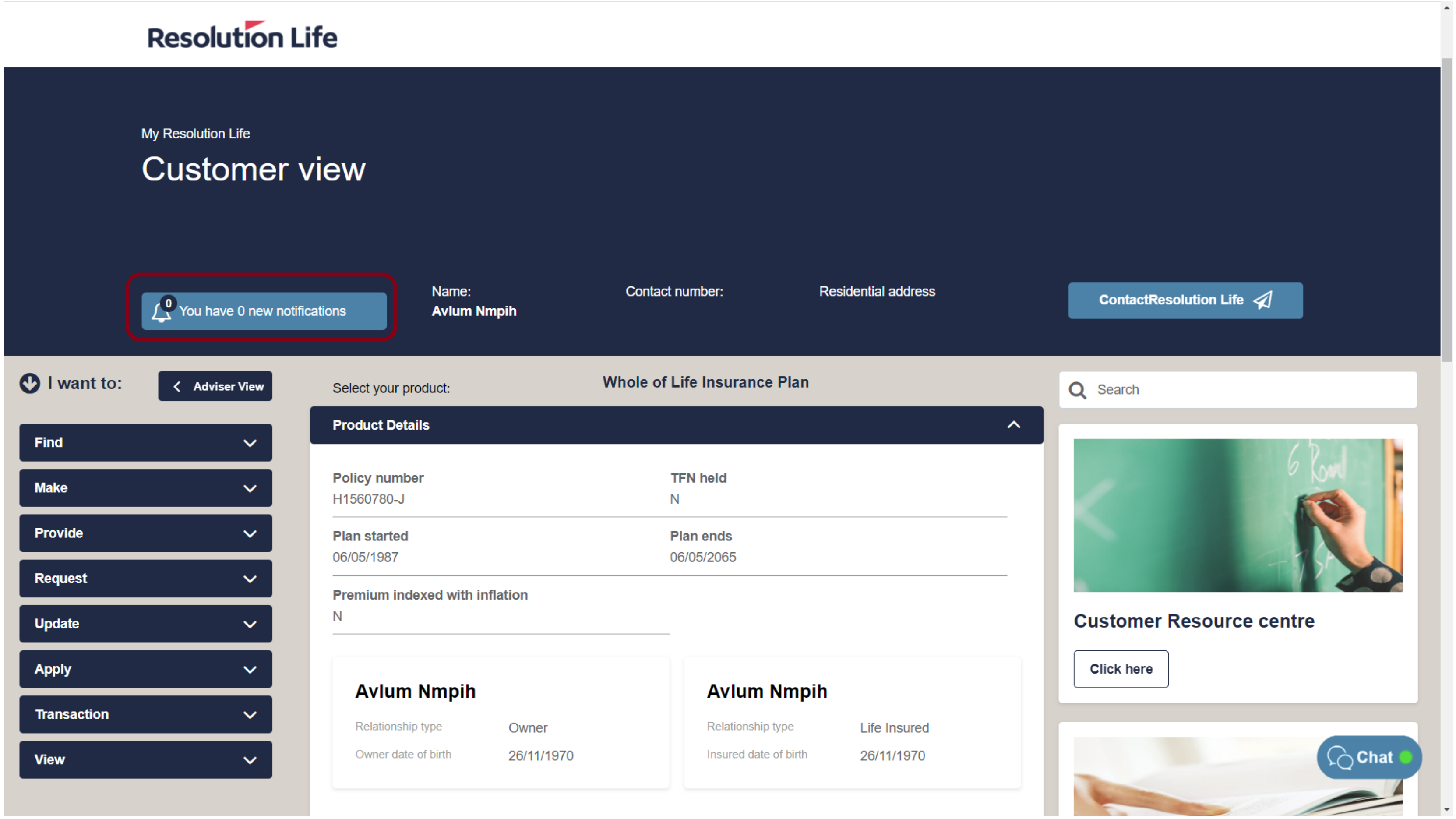
View customer notifications (3 of 3)

Within **Customer view**:

- Select the bell icon
- Notifications will display



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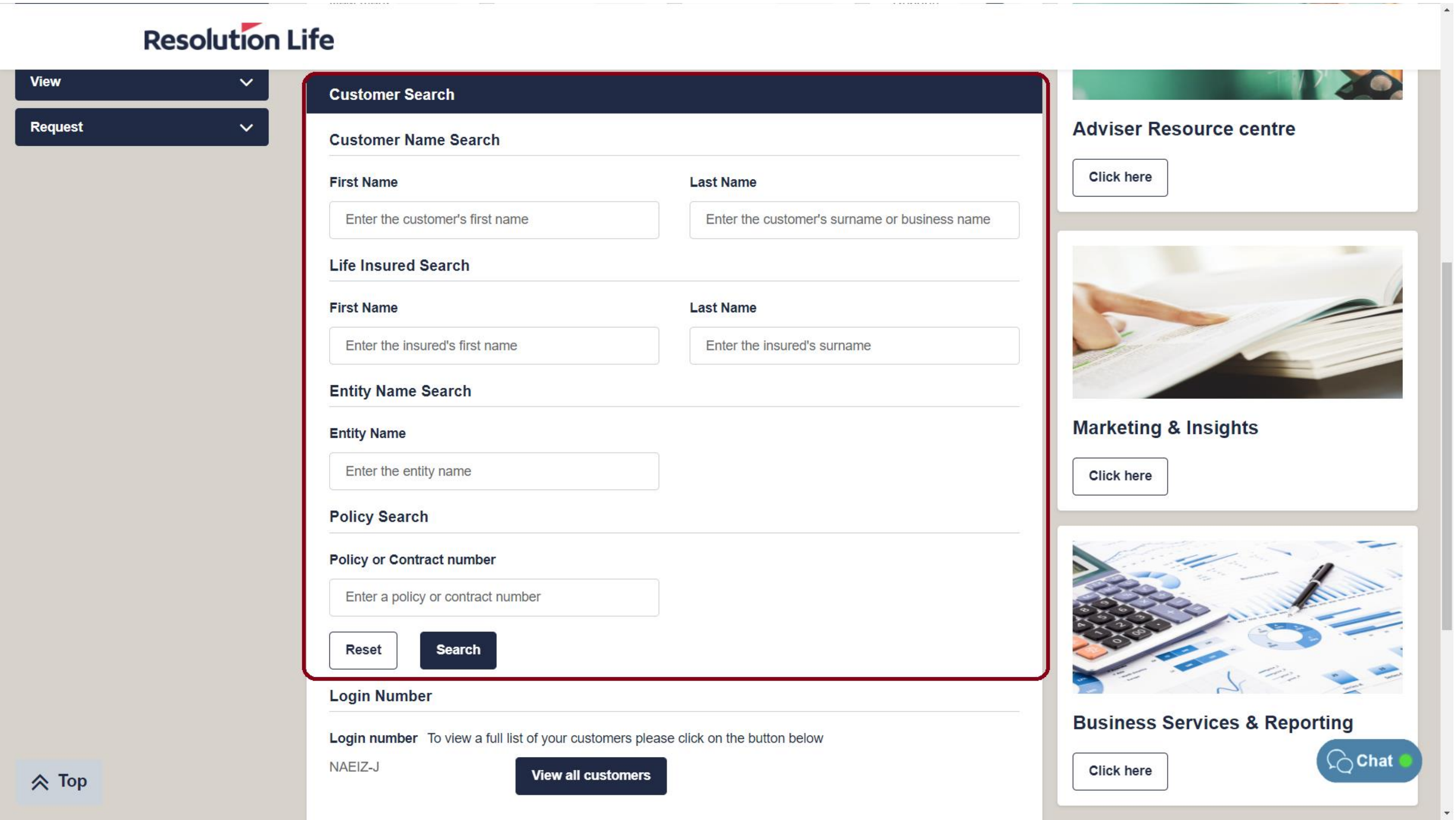
View customer statements and correspondence (1 of 4)

Using the Customer Search function on the home dashboard:

- Search for a customer using the available search options (detailed here in this guide)



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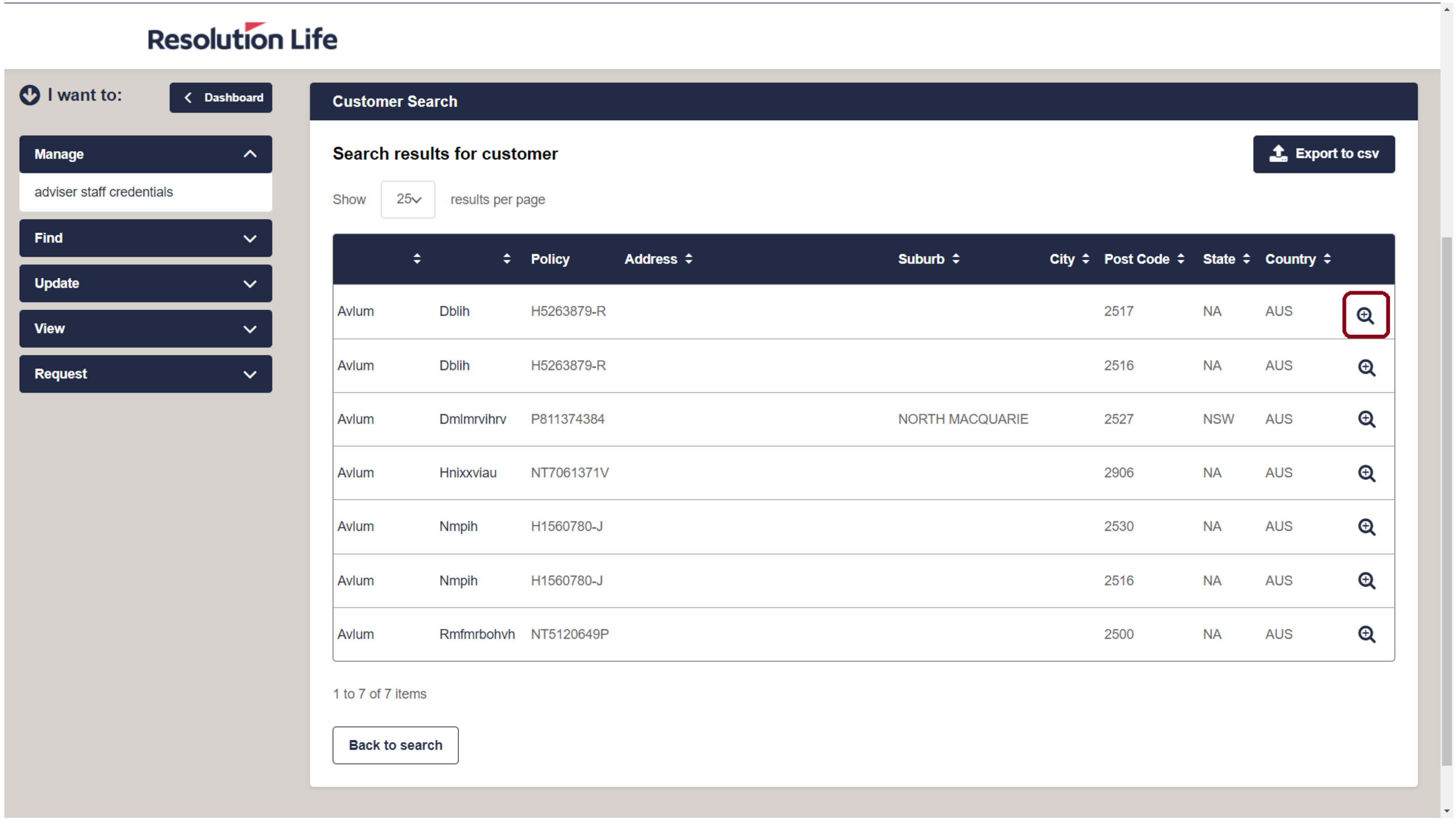
View customer statements and correspondence (2 of 4)

From the displayed list of Customer Search results:

- Identify the correct customer record
- Select the view icon



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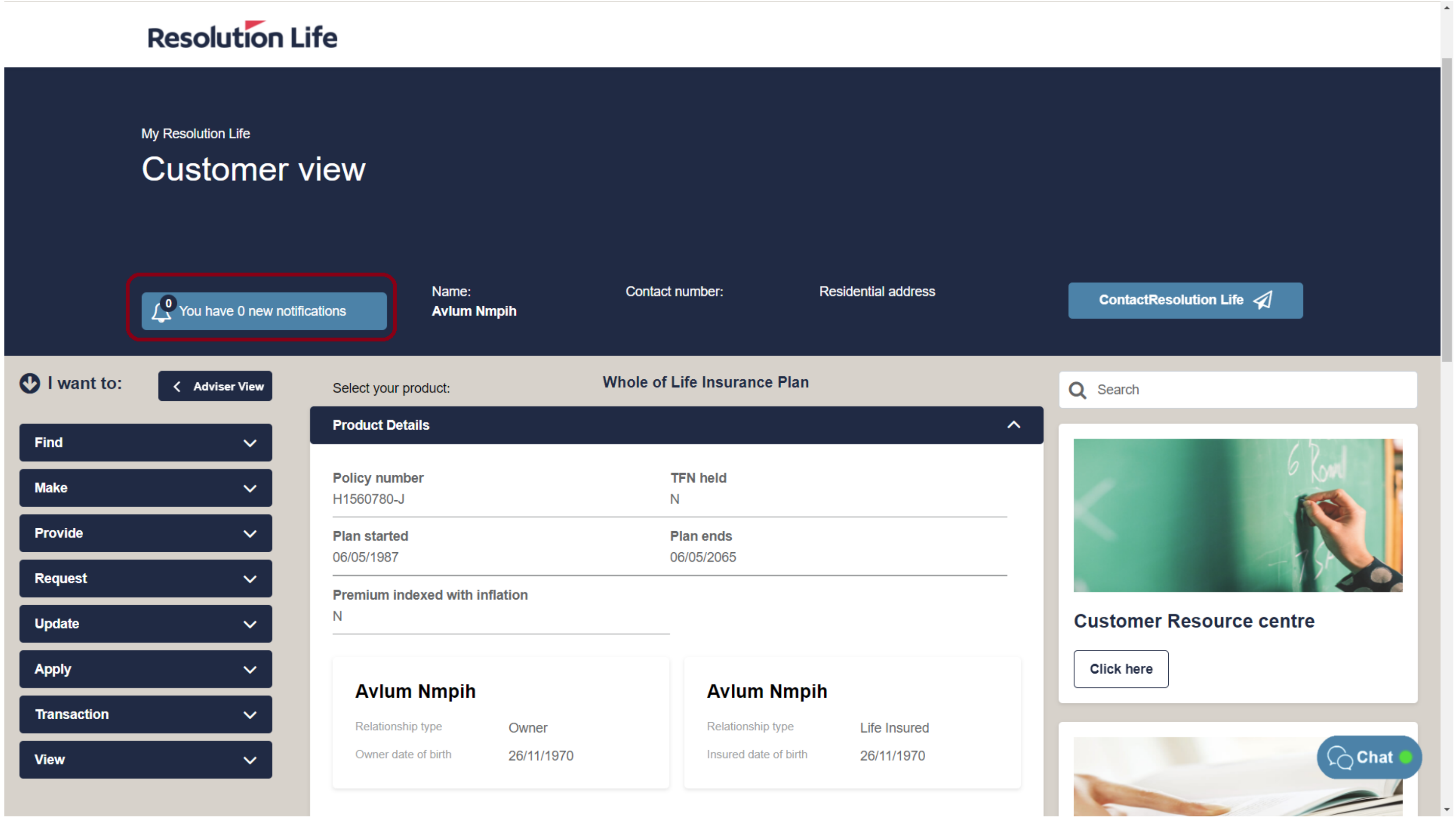
Resolution Life

View customer statements and correspondence (3 of 4)

Within **Customer view**:

- Select the bell icon
- Notifications will display



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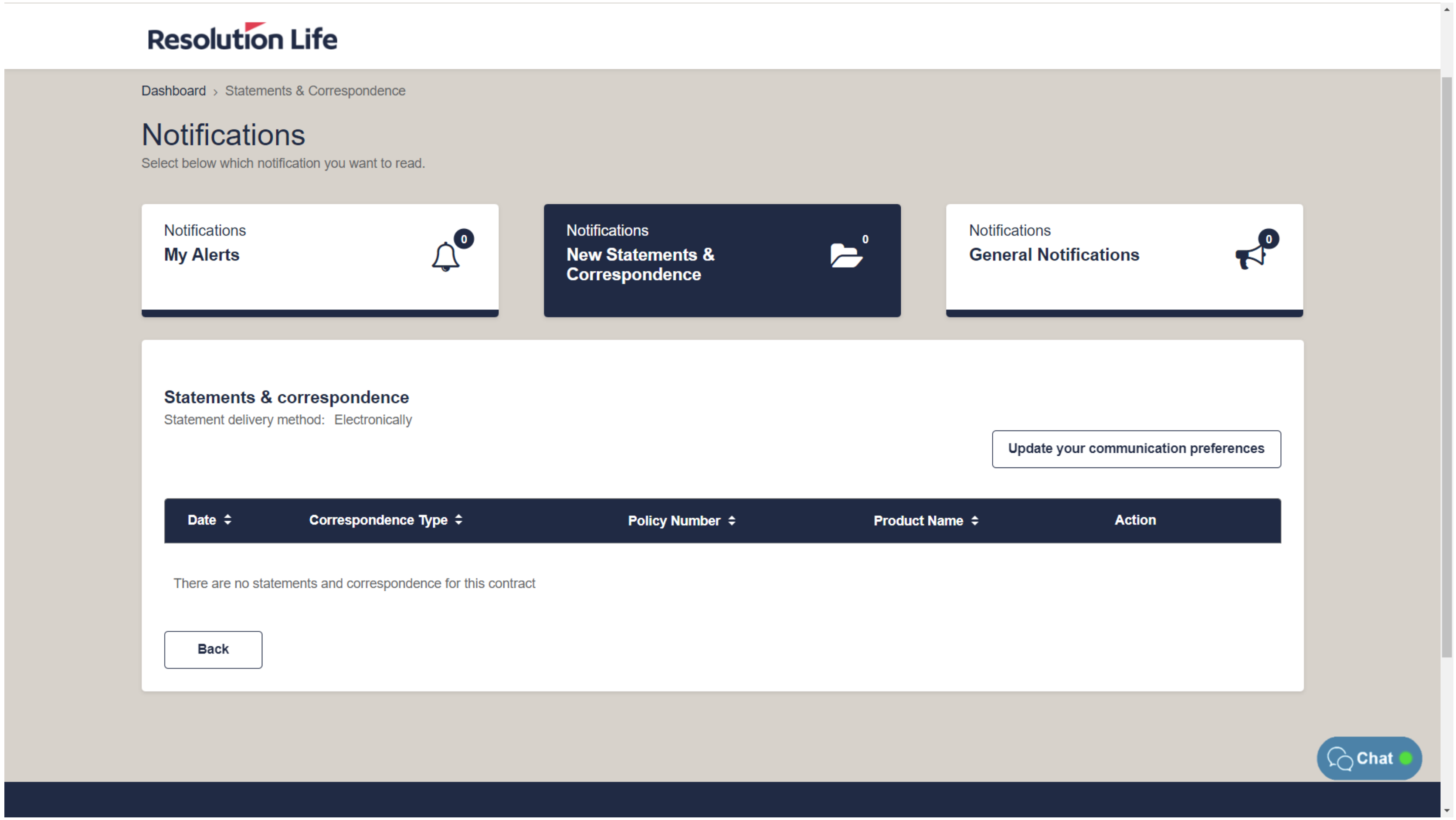
View customer statements and correspondence (4 of 4)

From the displayed list of statements and correspondence:

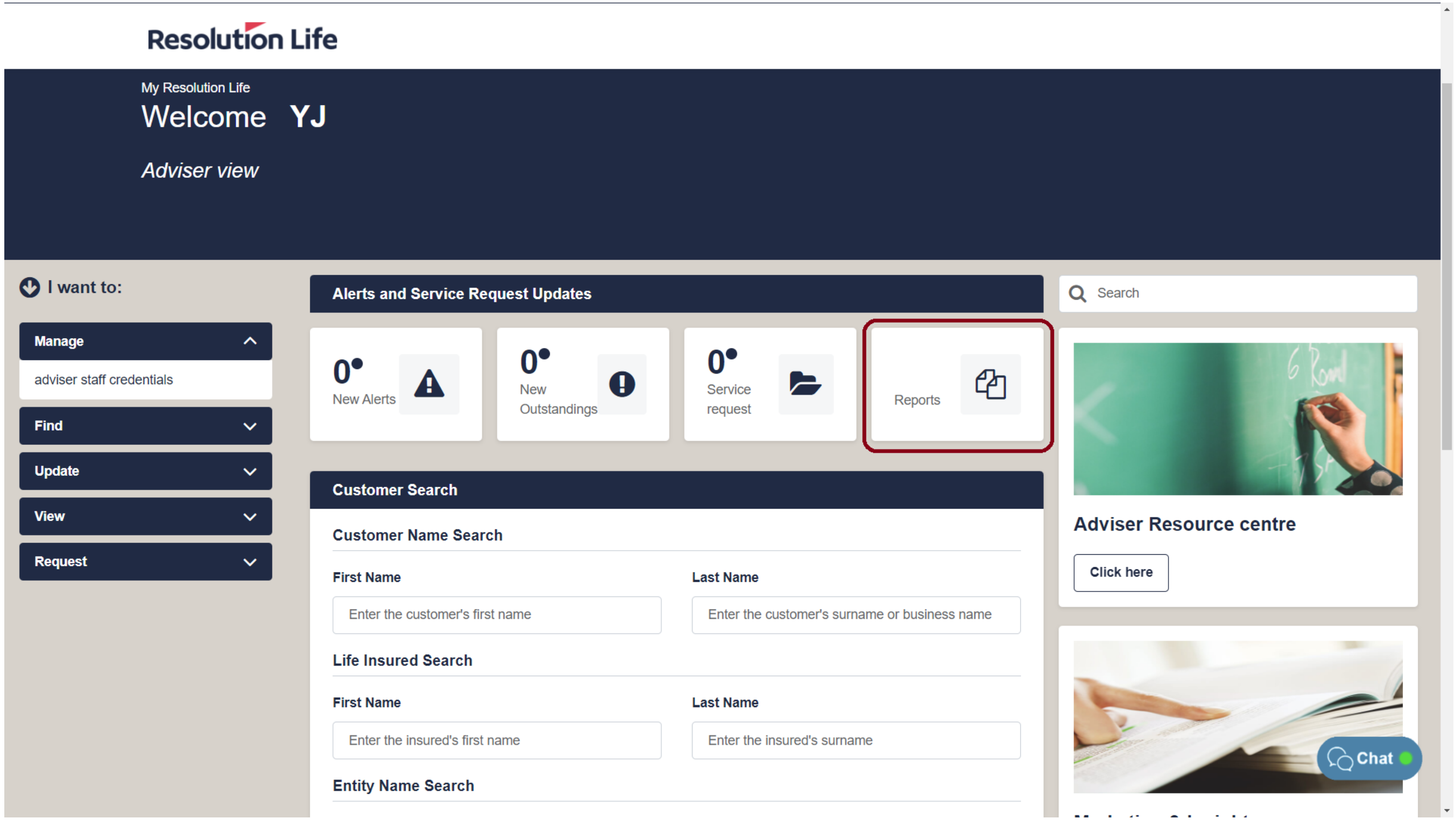
- Select **[View]** to open a document
- The document will open in a new window as a PDF file.



View missed payment reports (1 of 2)

From the home dashboard in **Adviser view**:

- Select **[Reports]**



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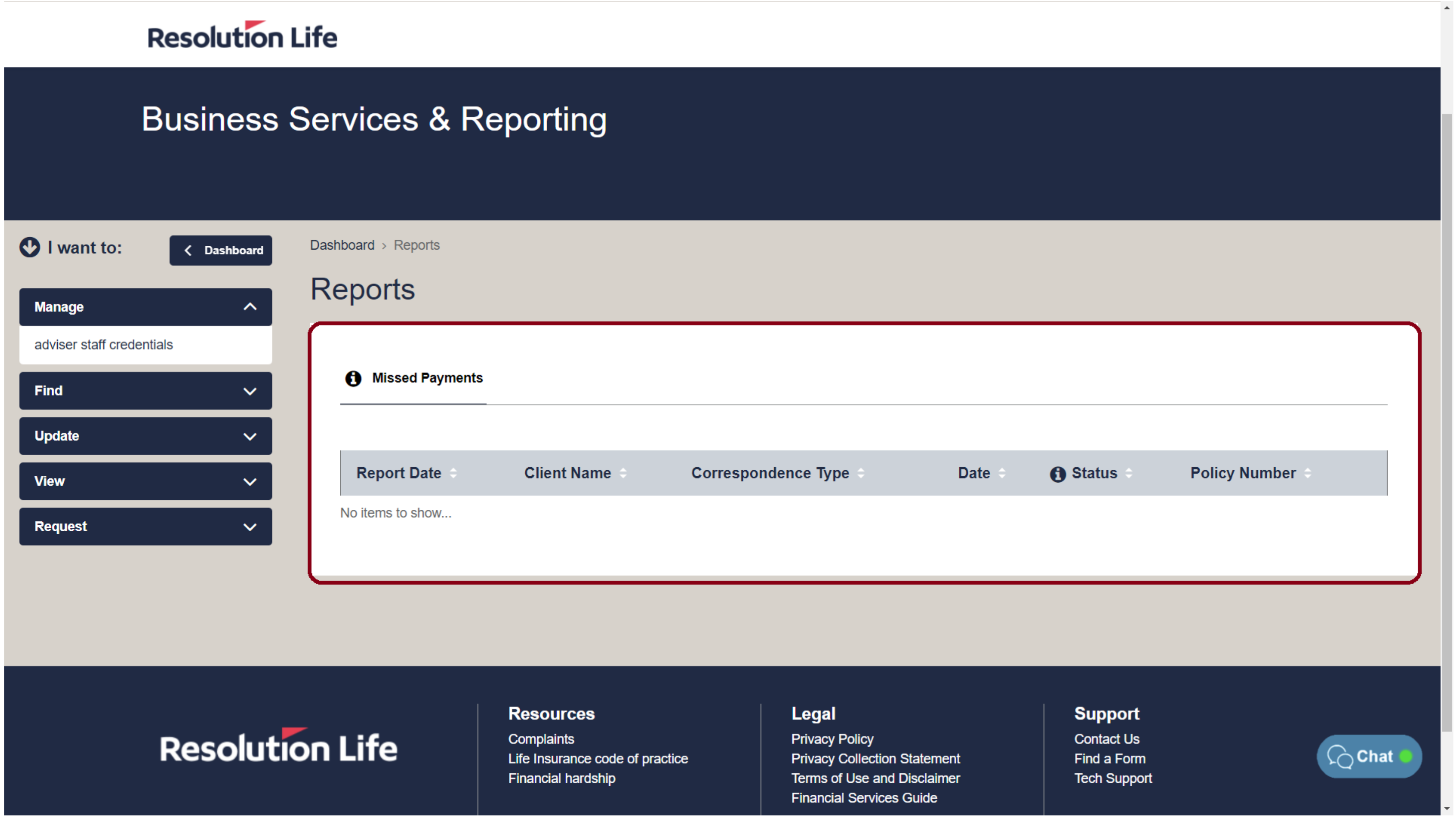
View missed payment reports (2 of 2)

Customer missed payment reports will display.

Reports can be sorted by the following criteria:

- Report Date
- Client Name
- Correspondence Type
- Date
- Status
- Policy Number



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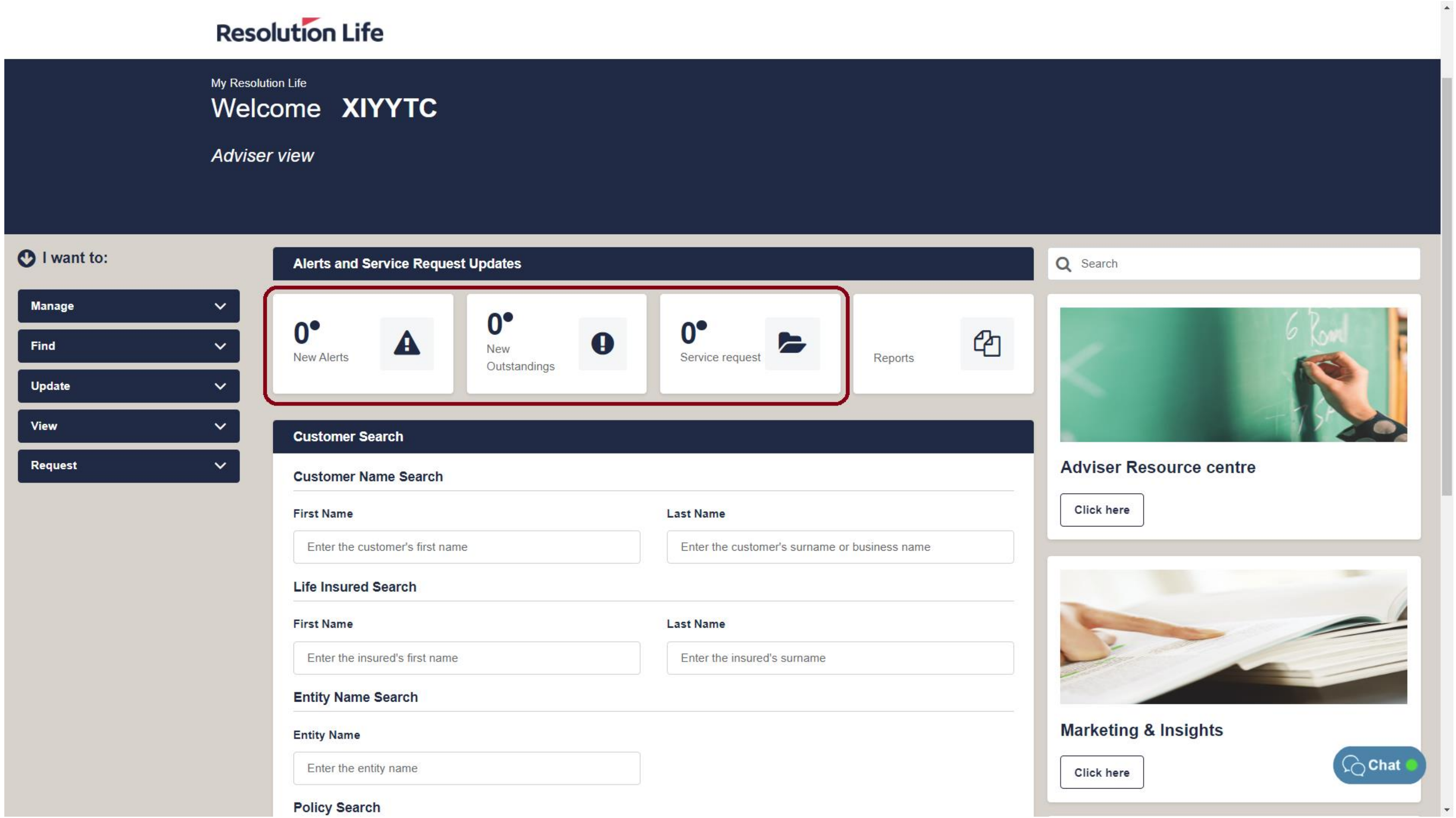
New Service Requests and Outstandings (1 of 1)

From the home dashboard in **Adviser view**:

- Select **[New Outstandings]** to view a list of all oustandings
- Select **[Service request]** to view a list of all customer service requests

- The Alerts and Service Request Updates section of the dashboard is where you can view your customer's service requests and outstandings.

- Case notes can be added and documents can be attached to customer service requests.



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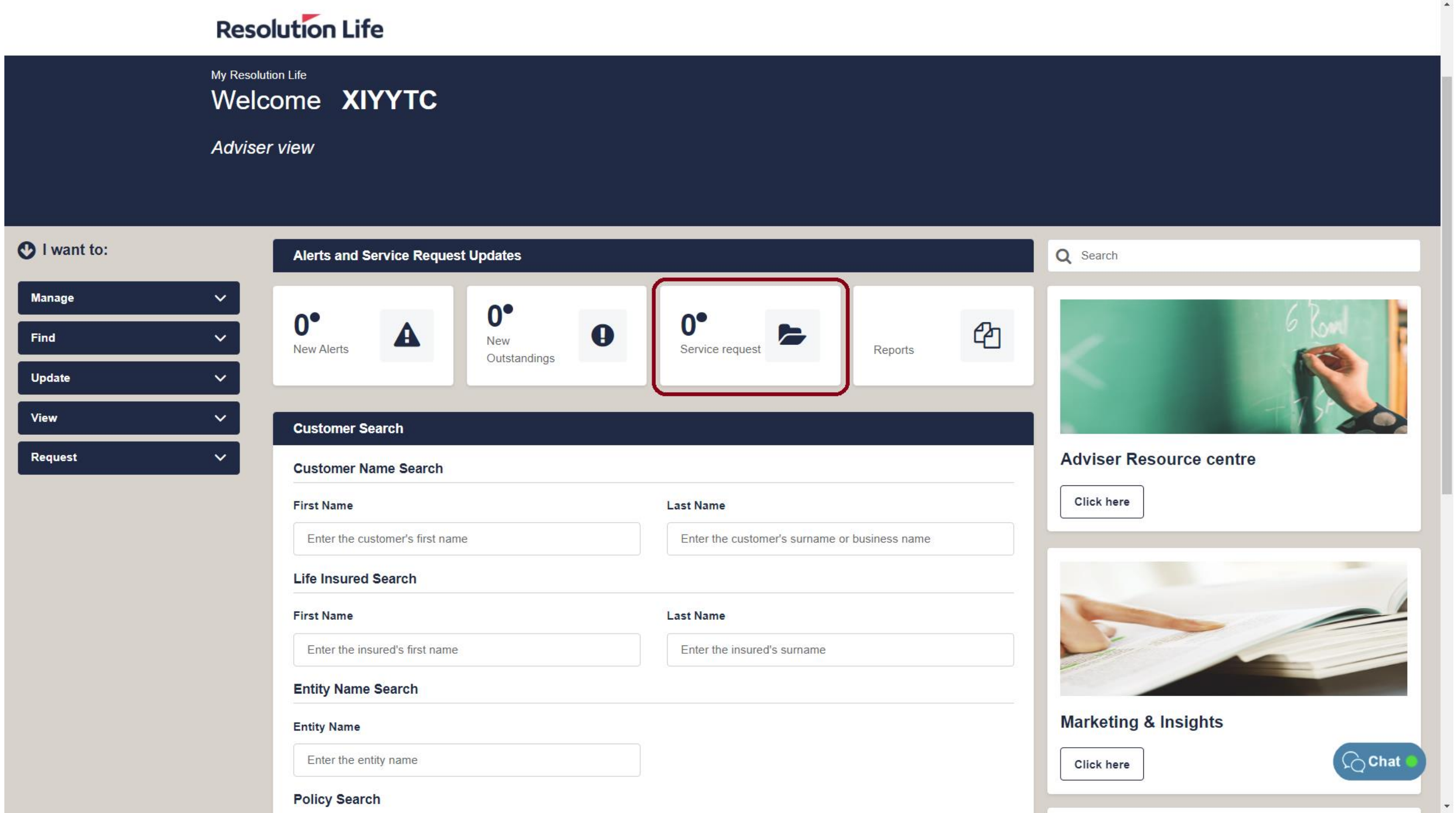
Update Service Request (1 of 4)

From the home dashboard in **Adviser view**:

- Select **[Service request]** to view a list of all customer service requests



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Update Service Request (2 of 4)

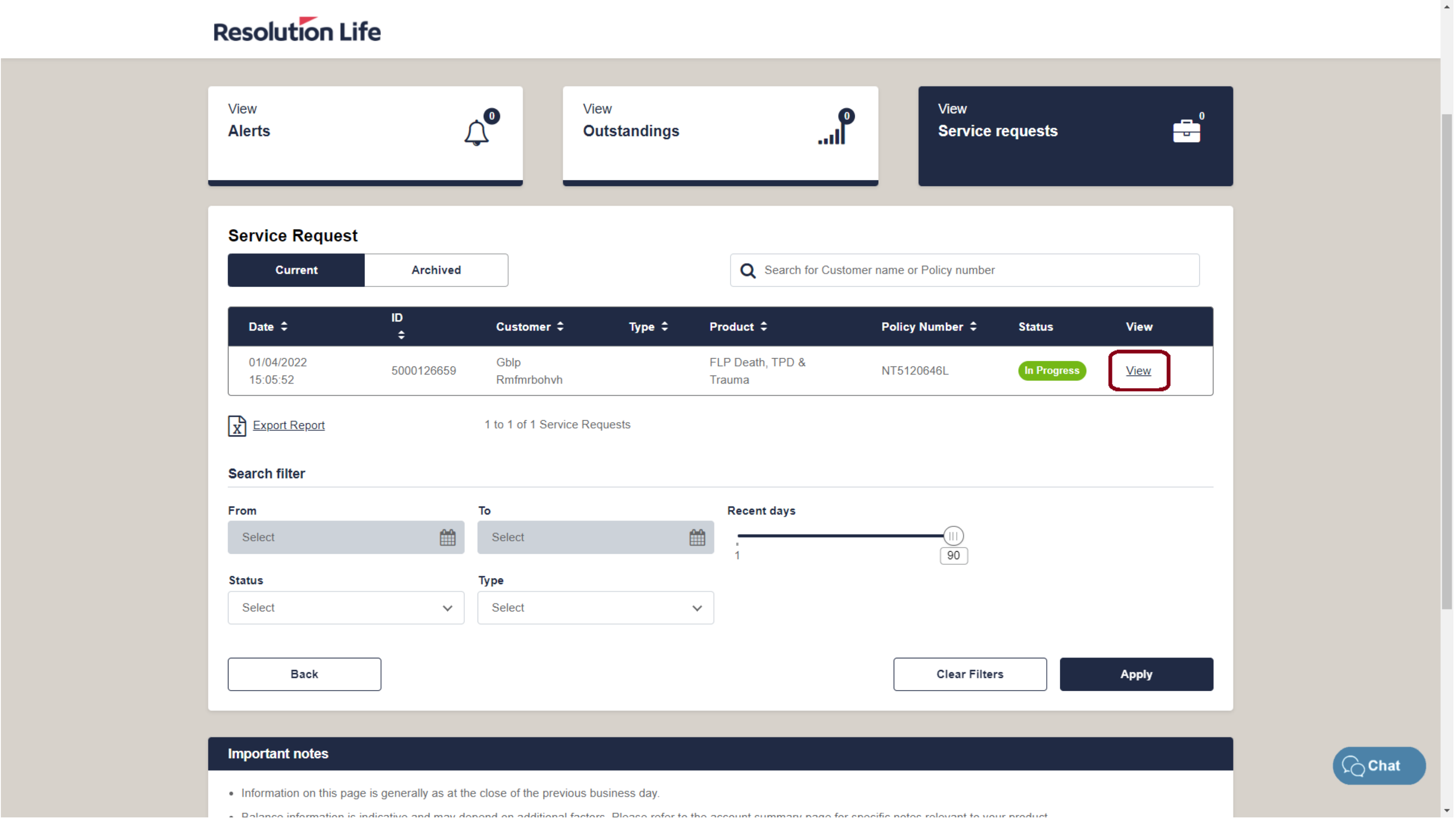
A list of all current service requests will be displayed.

Items in bold text are yet to be viewed.

The following fields are displayed:

- Request Date
- ID
- Customer
- Type
- Product
- Policy Number
- Status

Select **[View]** to open an item.



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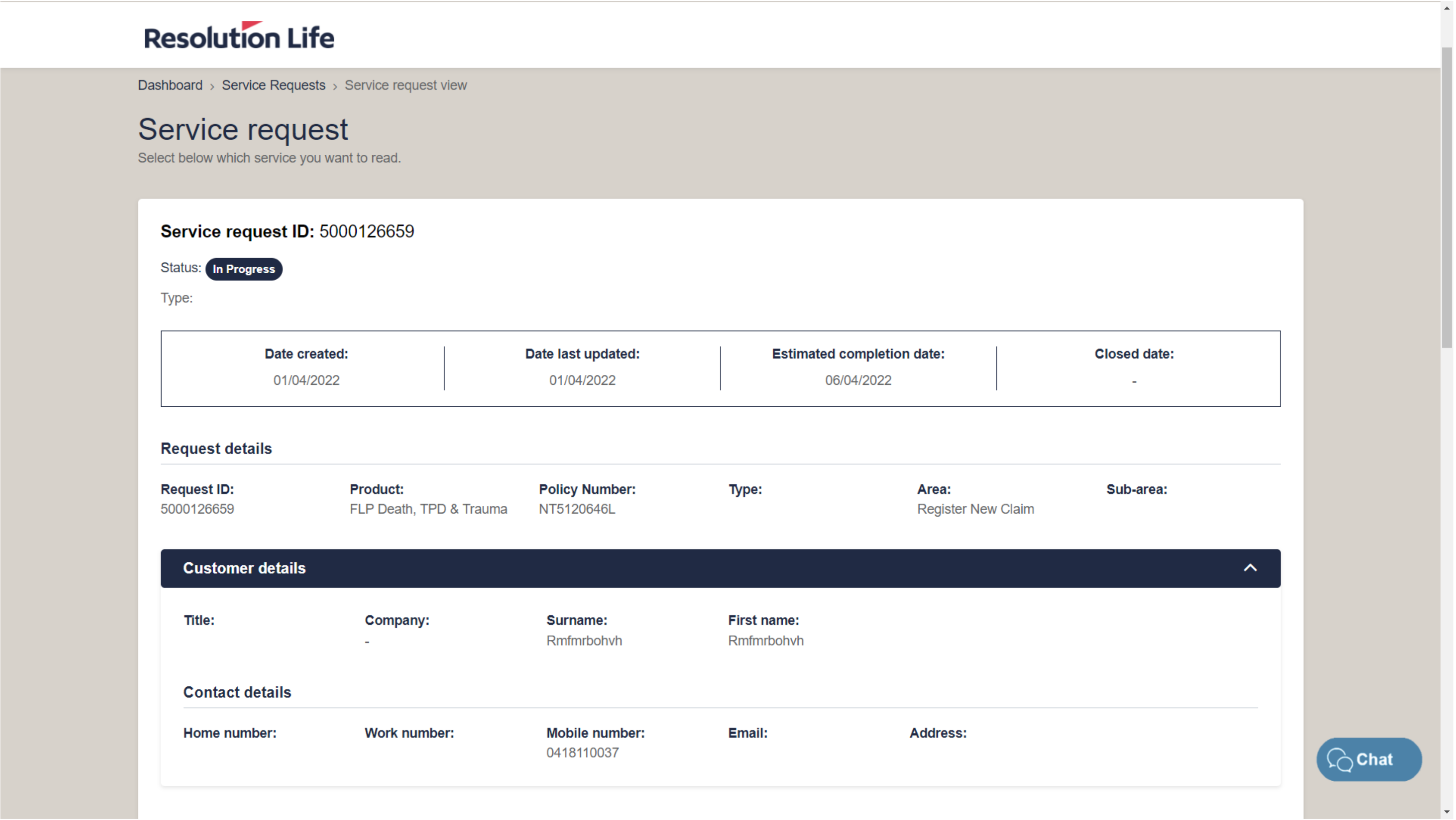
Update Service Request (3 of 4)

The status of the service request will be displayed, as well as the following:

- Request ID
- Case type information
- Customer details
- Outstandings
- Case notes
- Documents
- Service request milestones



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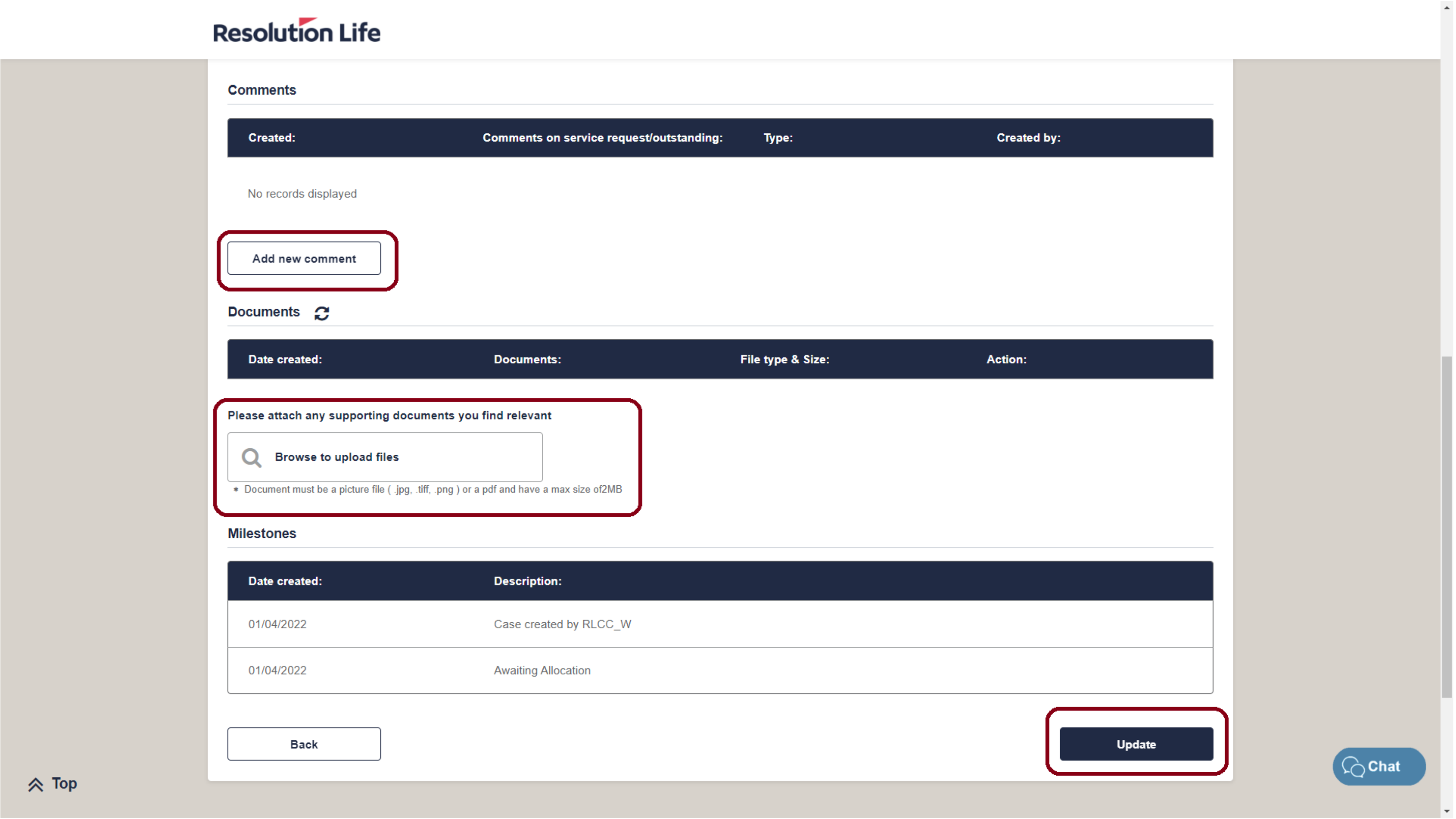
Update Service Request (4 of 4)

To add a case note:

- Select **[Add new comment]**
- Type notes and select **[Save]**

To upload a document:

- Select **[Browse to upload files]**
- Choose file and upload.
- Select **[Update]** to save changes before exiting



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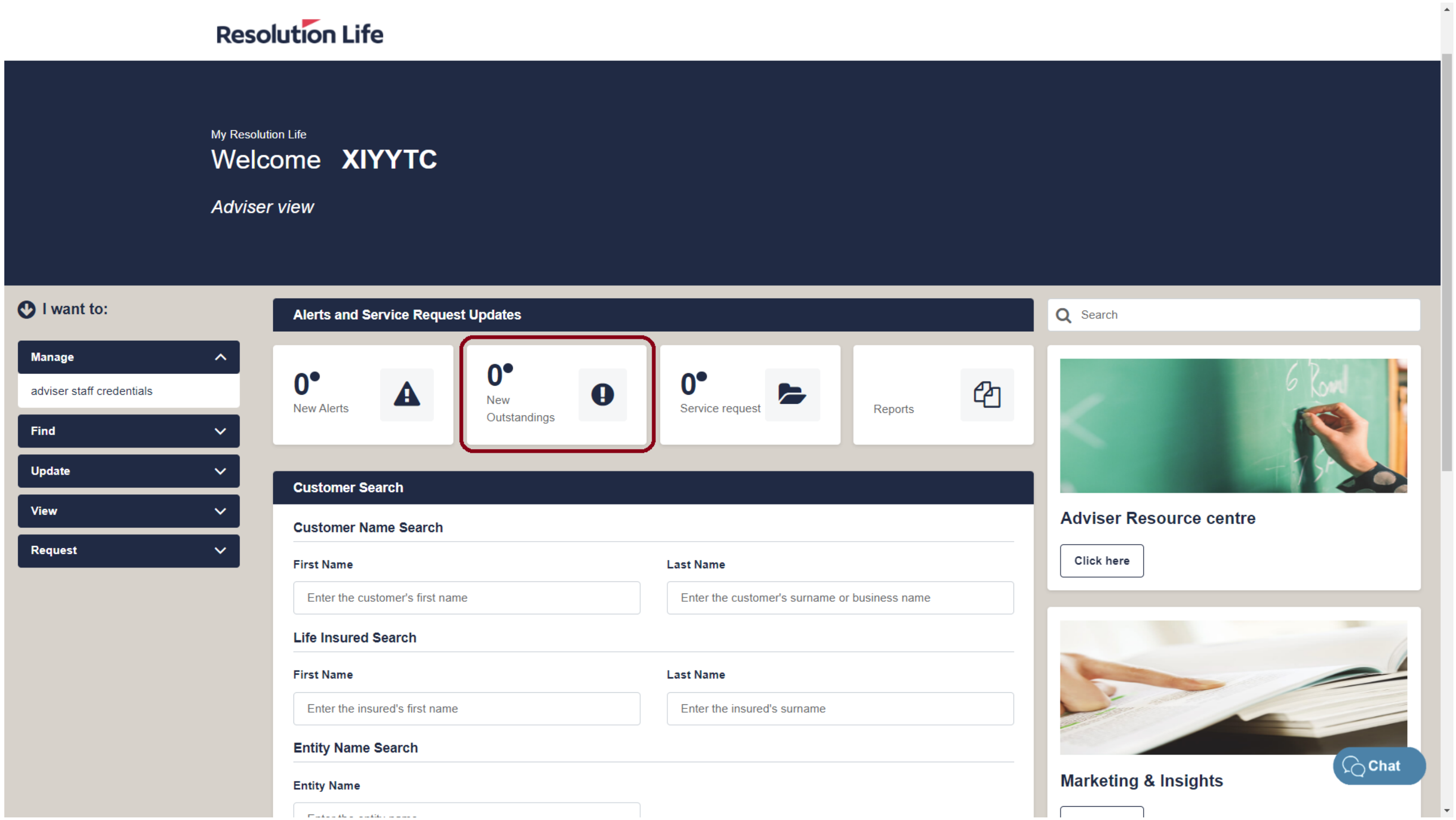
Update an Outstanding (1 of 4)

From the home dashboard in **Adviser view**:

- Select **[New Outstandings]** to view a list of all oustandings



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Update an Outstanding (2 of 4)

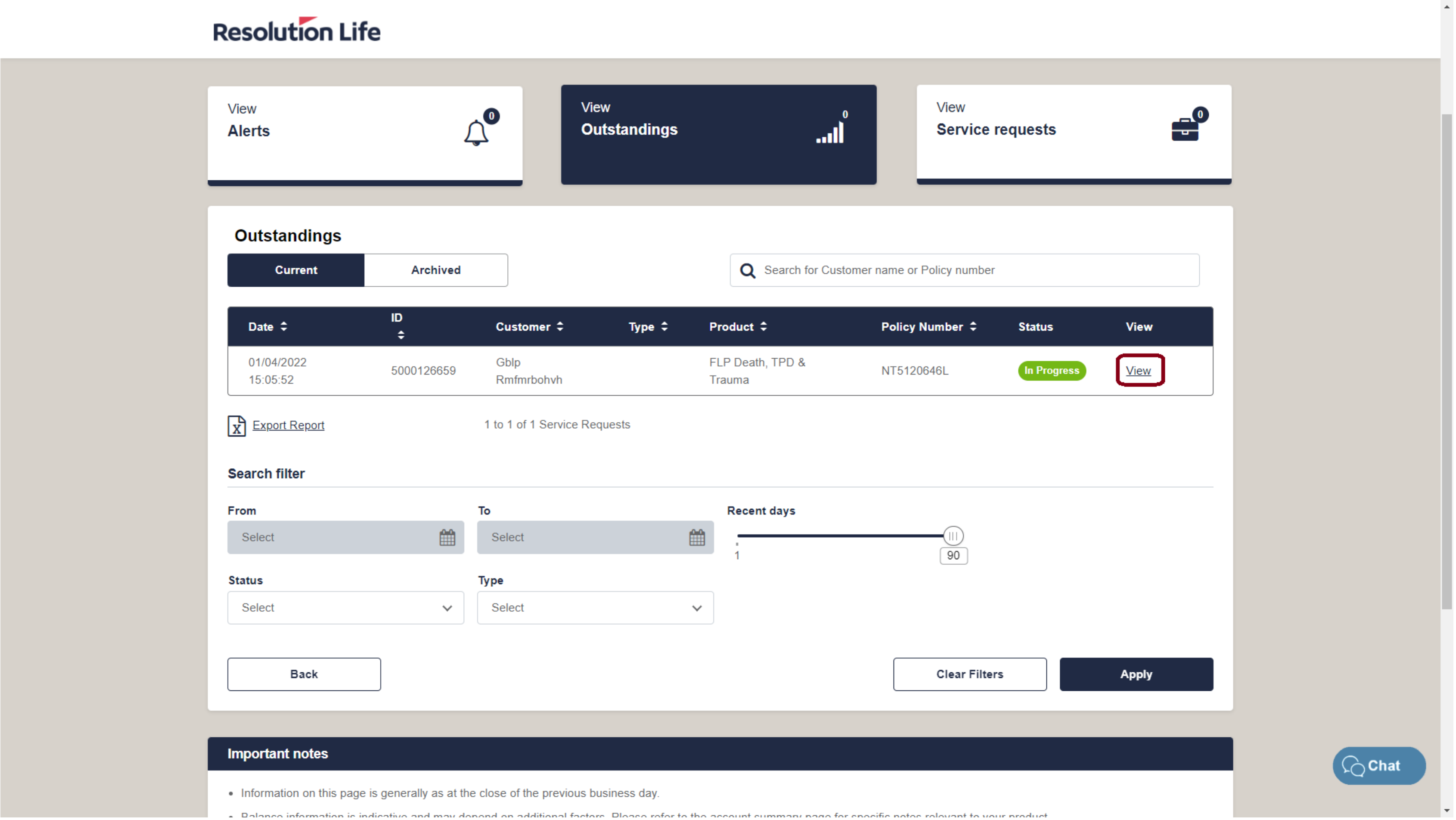
A list of all current outstandings will be displayed.

Items in bold text are yet to be viewed.

The following fields are displayed:

- Request Date
- ID
- Customer
- Type
- Product
- Policy Number
- Status

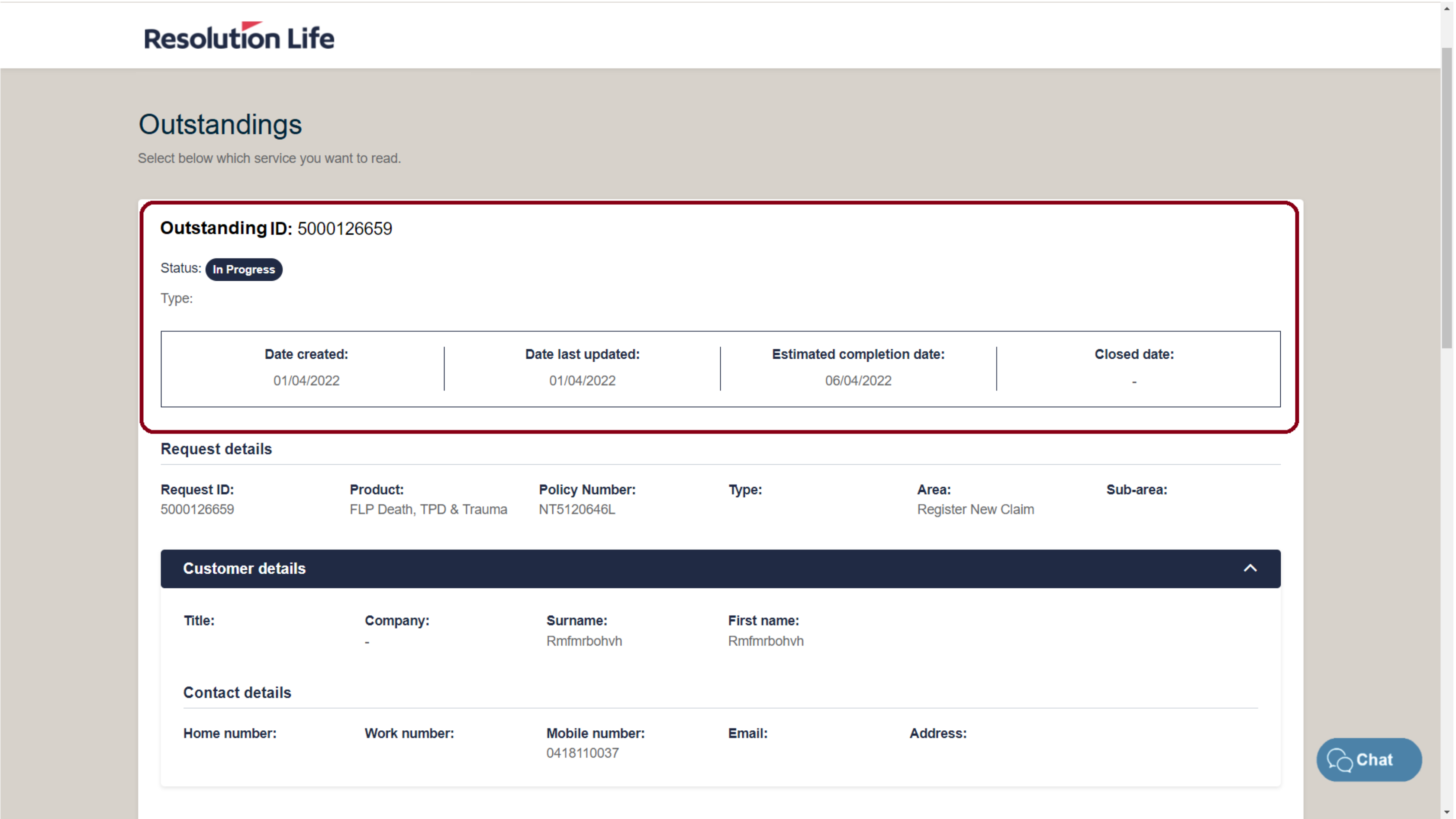
Select **[View]** to open an item.



Update an Outstanding (3 of 4)

The status of the outstanding will be displayed, as well as the following:

- Request ID
- Case type information
- Customer details
- Case notes
- Documents
- Service request milestones



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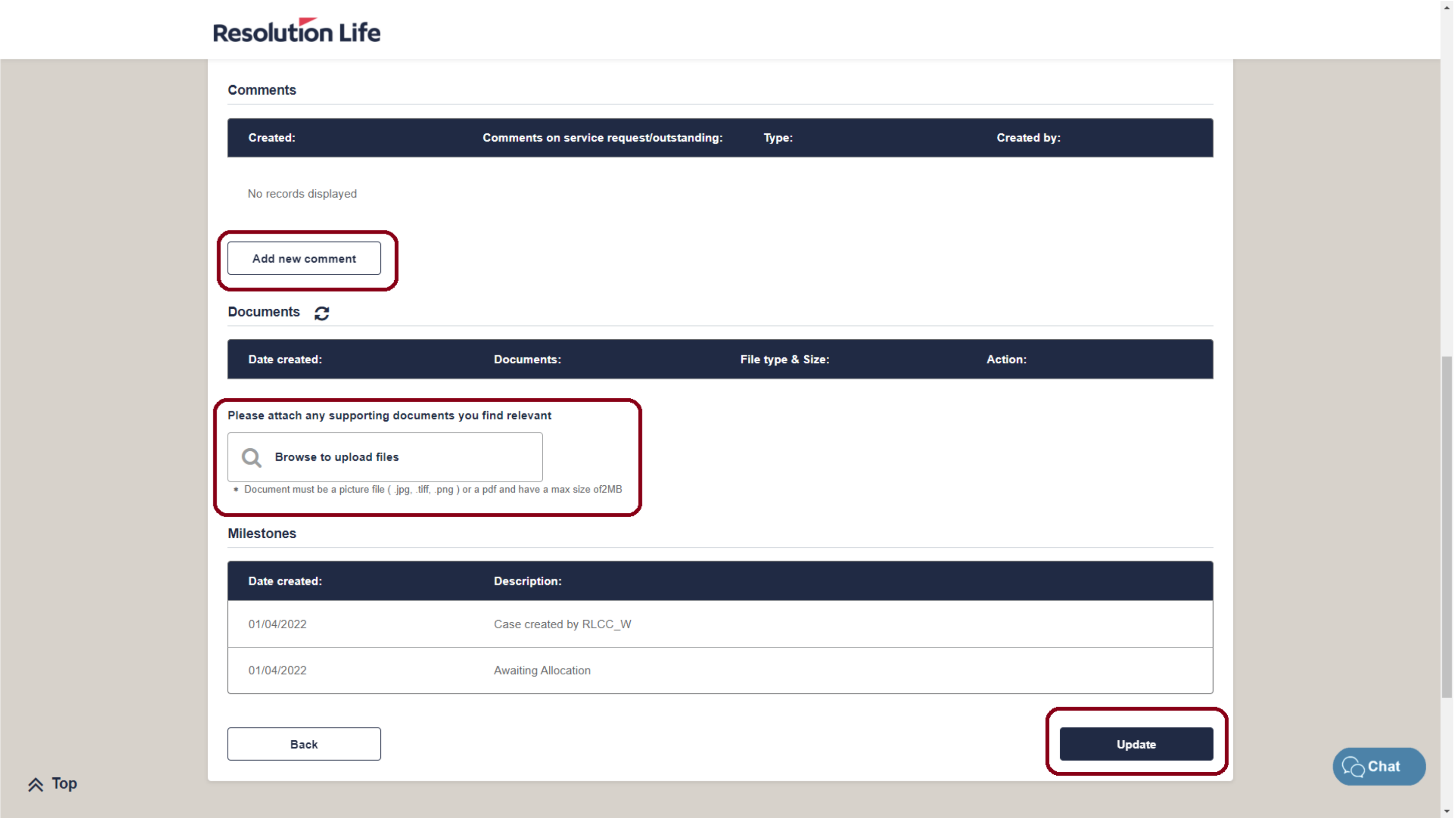
Update an Outstanding (4 of 4)

To add a case note:

- Select **[Add new comment]**
- Type notes and select **[Save]**

To upload a document:

- Select **[Browse to upload files]**
- Choose file and upload.
- Select **[Update]** to save changes before exiting



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Search Service Requests and Outstandings (1 of 1)

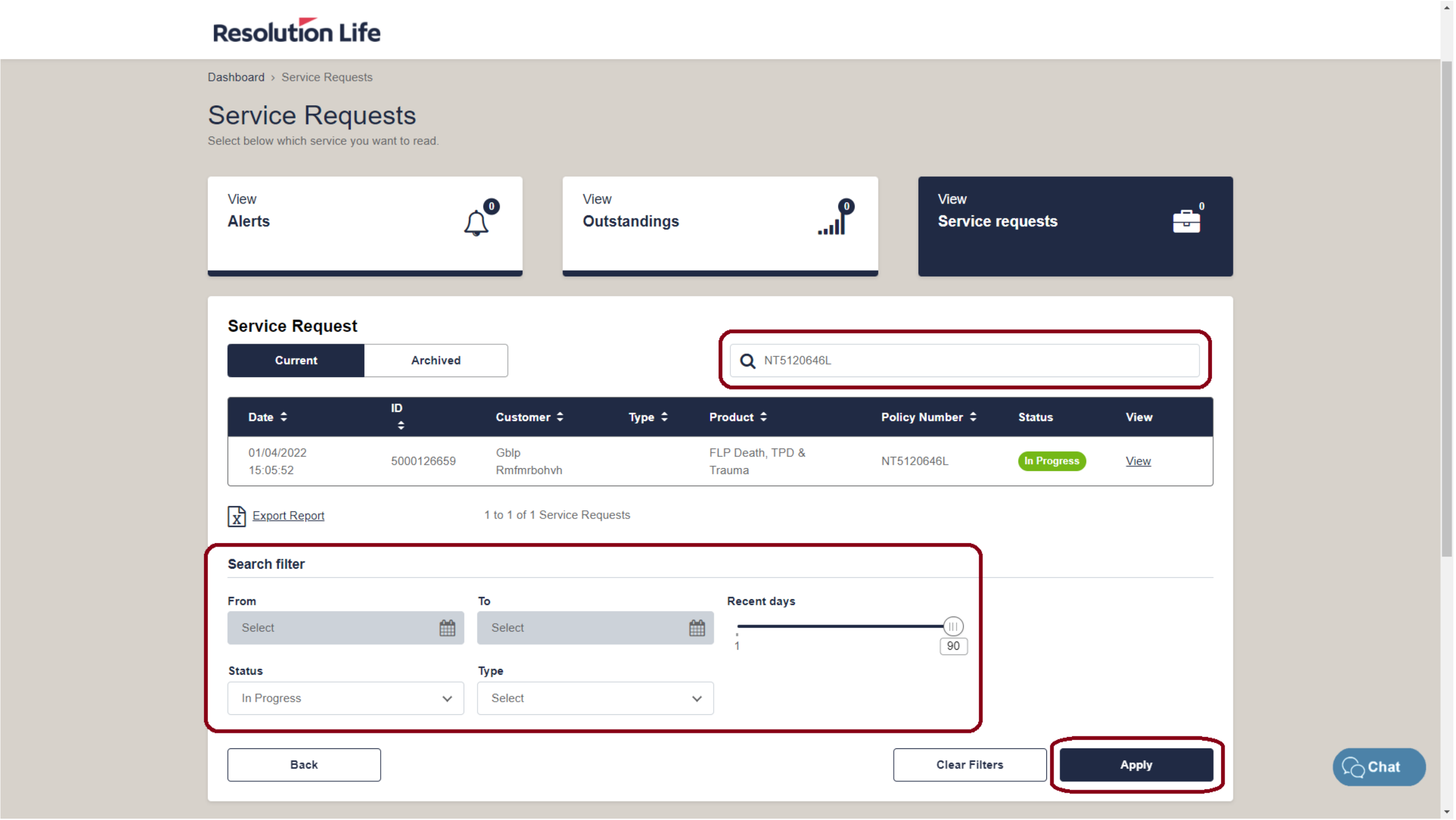
Service Requests and Outstandings can be searched by entering:

- Customer name
- Policy number

Search results can be filtered by:

- Date range
- Status
- Type

Select **[Apply]** to refine results.



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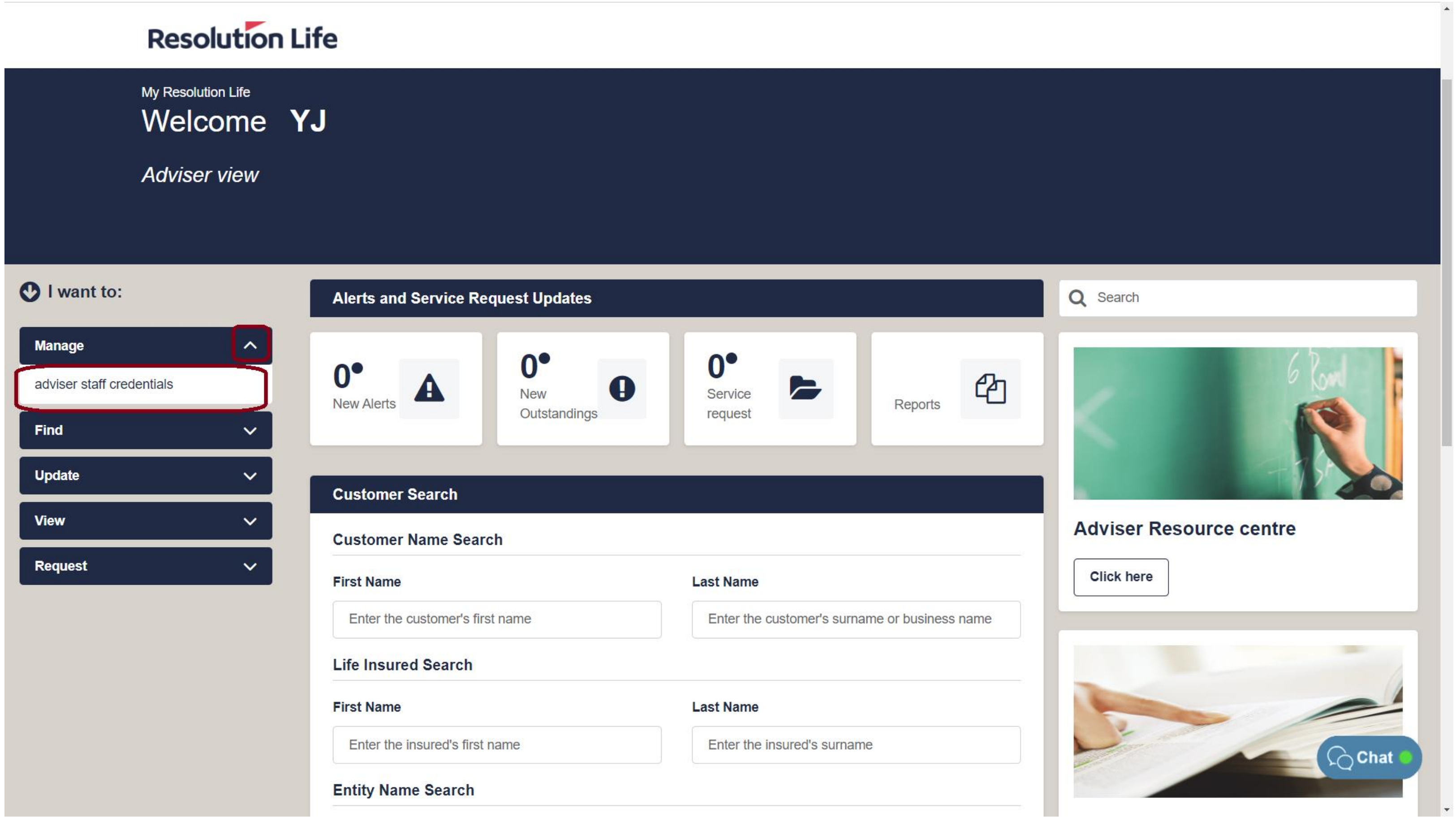
Manage staff credentials (1 of 4)

From the dashboard menu on the left of the **Adviser view** home screen:

- Select the drop-down icon on **Manage**
- Select **[adviser staff credentials]**



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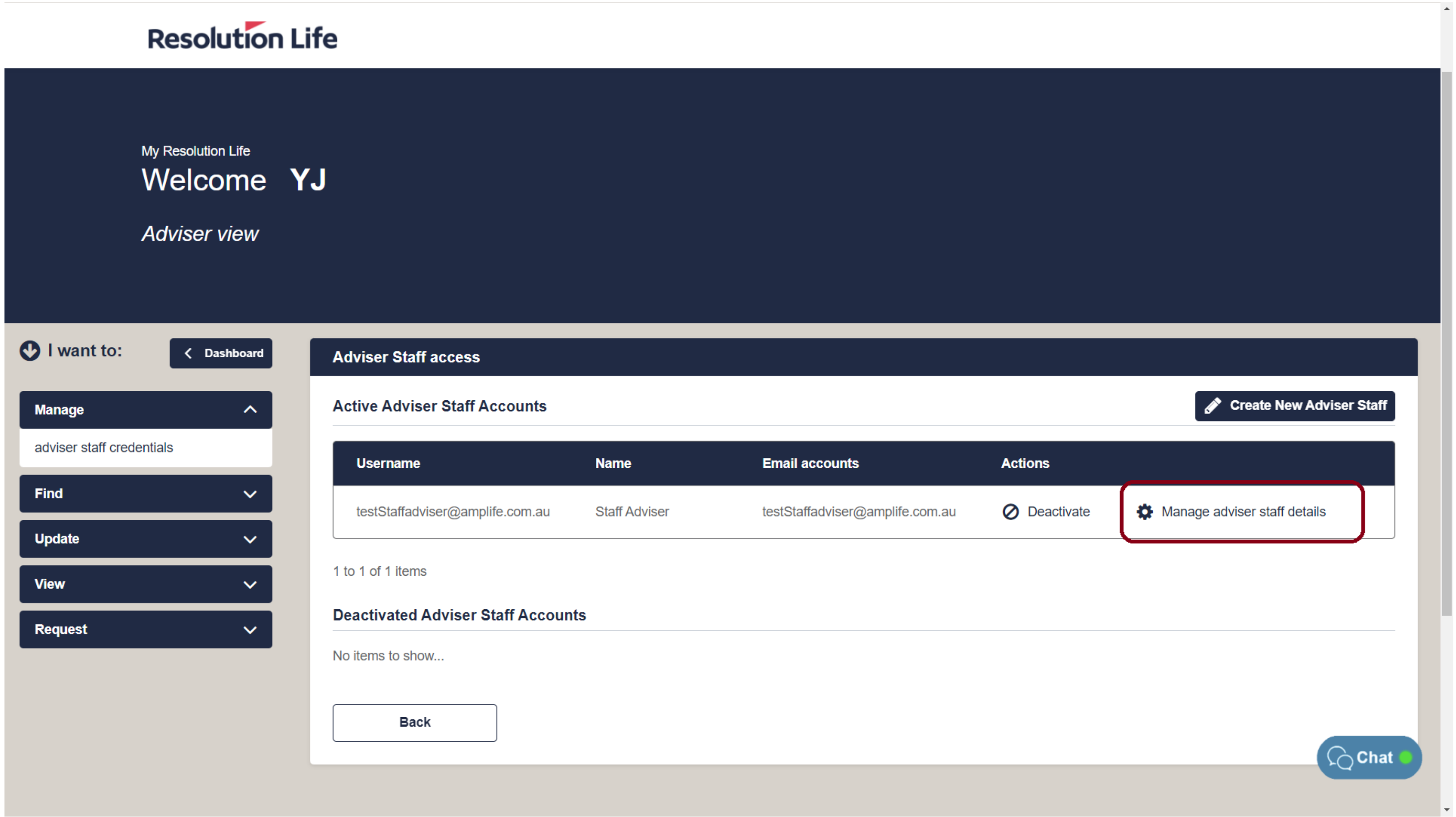
Manage staff credentials (2 of 4)

A list of **Active Adviser Staff Accounts** and **Deactivated Adviser Staff Accounts** will display.

- Select **[Manage adviser staff details]** next to the chosen record.



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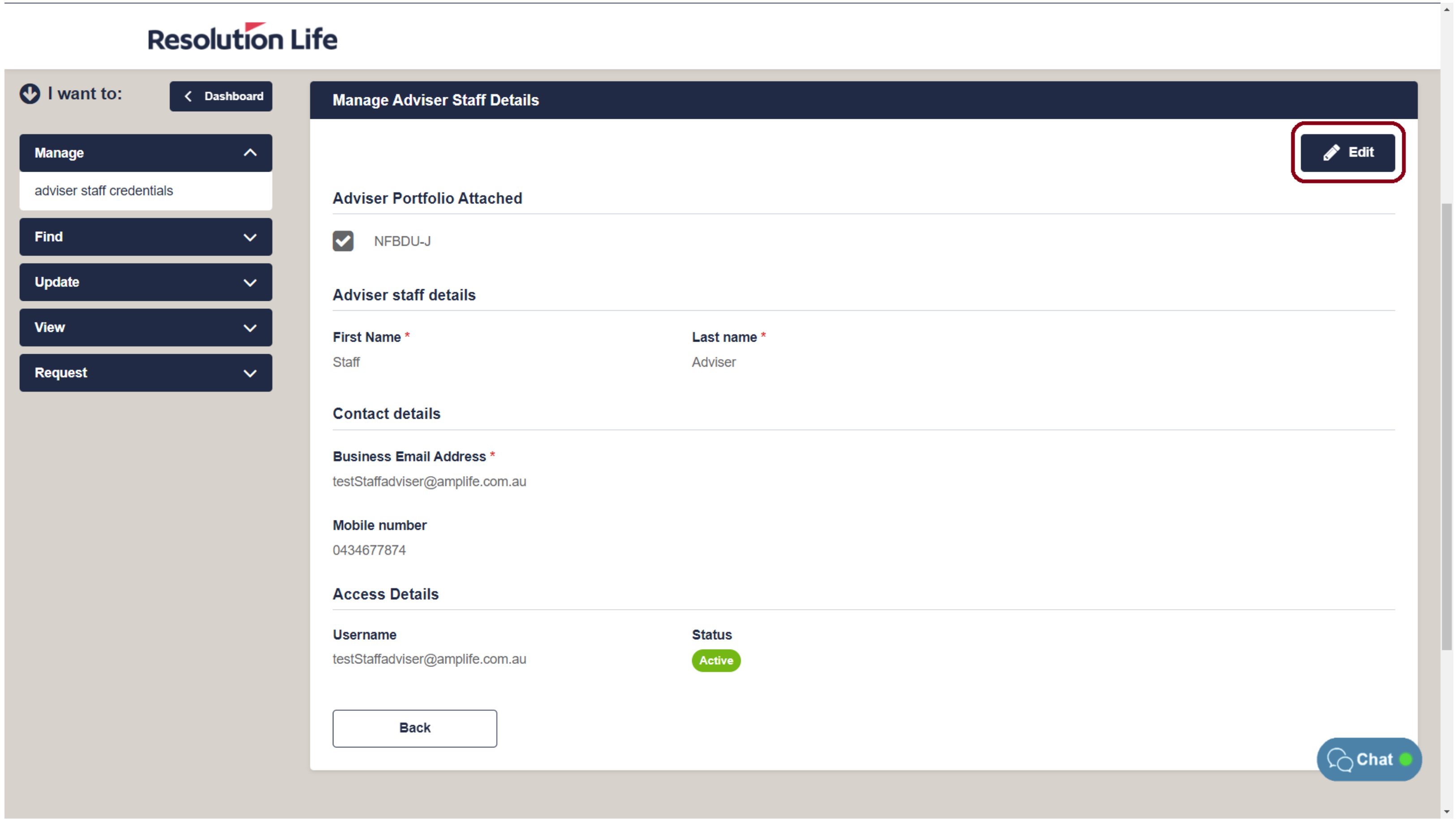
Manage staff credentials (3 of 4)

- Select the **[Edit]** button in the top right-hand corner



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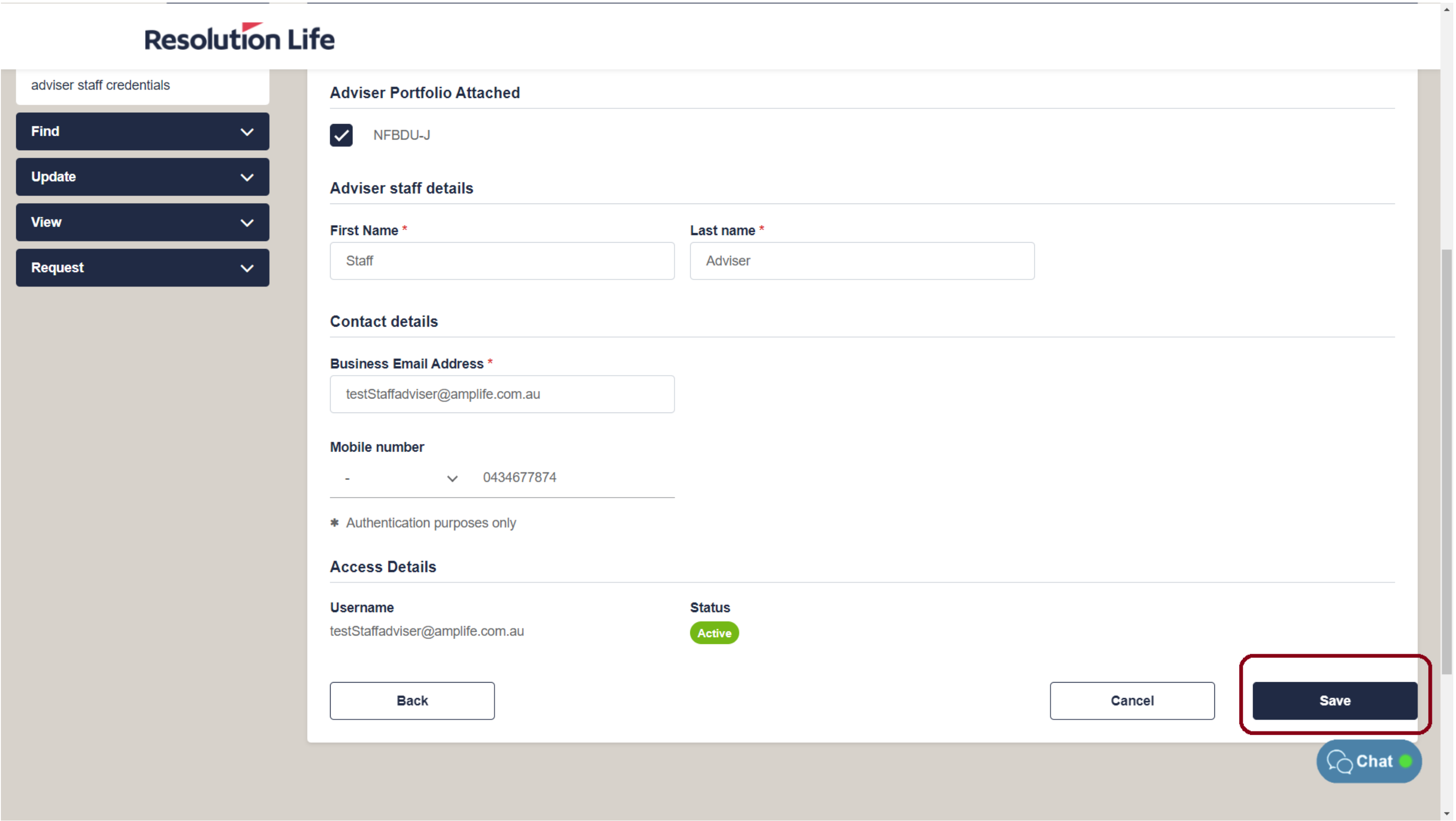
Manage staff credentials (4 of 4)

From this screen, the following details can be edited:

- The adviser portfolio attached
- First name and last name
- Contact details

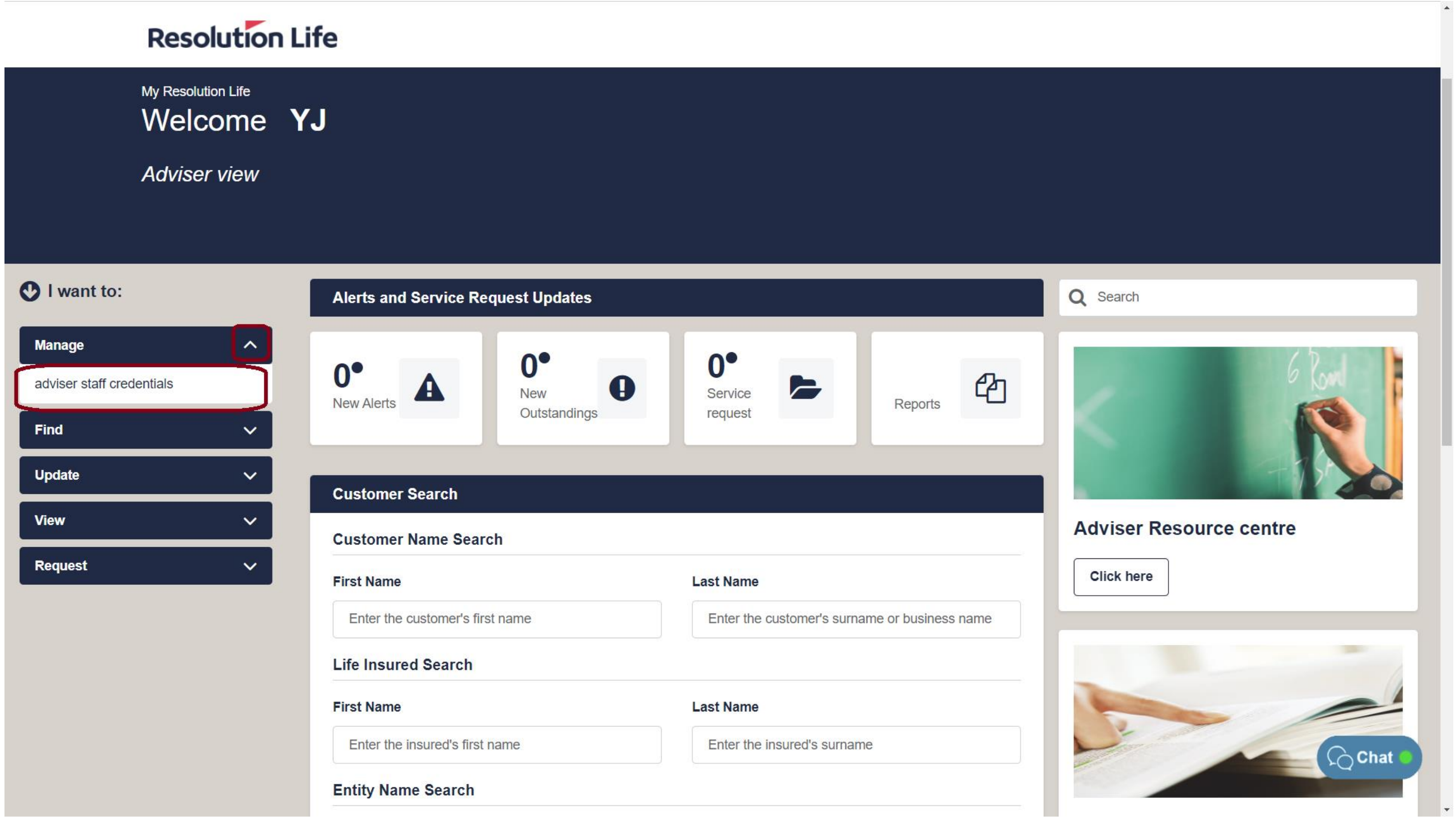
Select **[Save]** to confirm changes.



Create new adviser staff (1 of 7)

From the dashboard menu on the left of the **Adviser view** home screen:

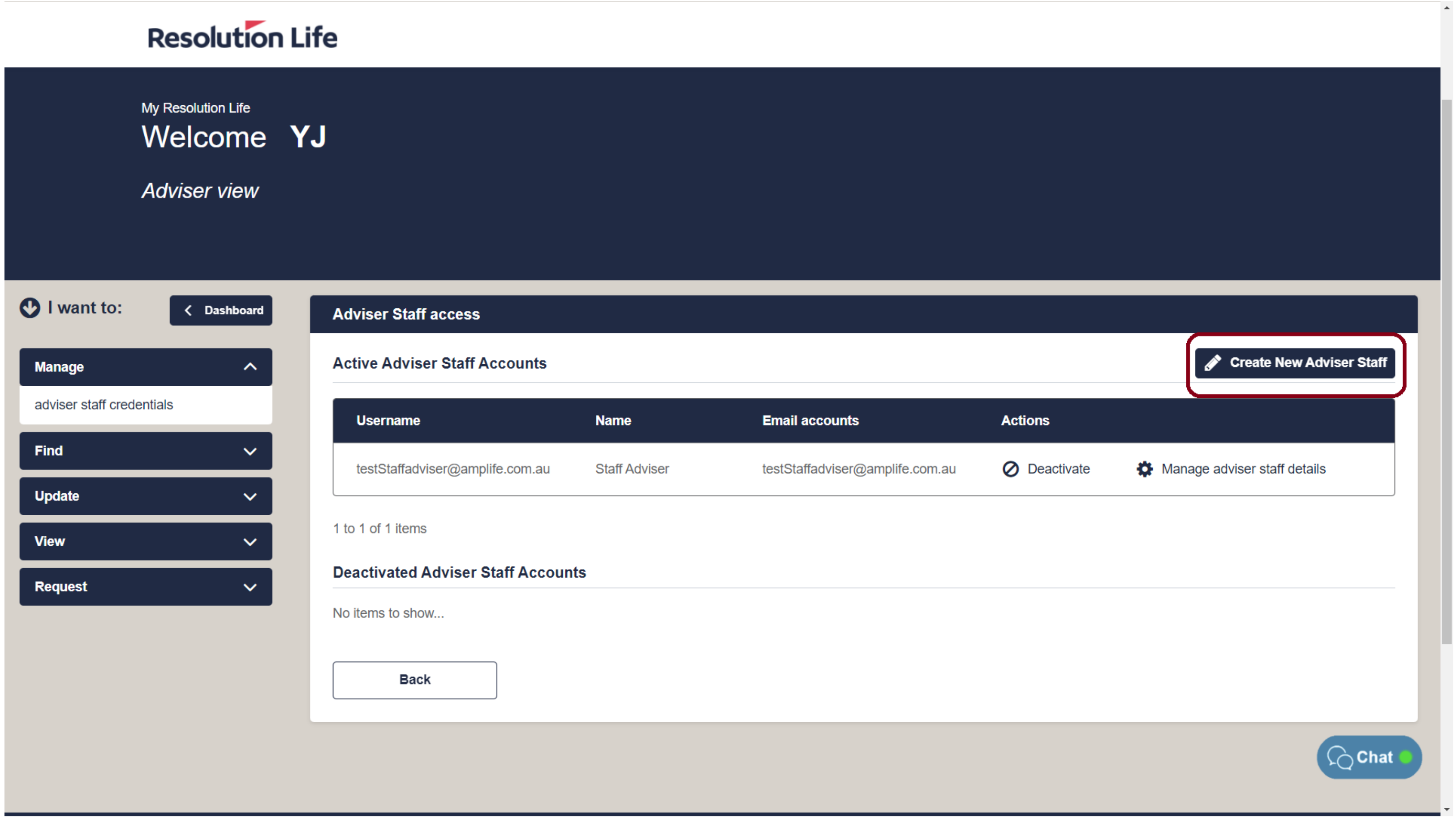
- Select the drop-down icon on **Manage**
- Select **[adviser staff credentials]**



Resolution Life

Create new adviser staff (2 of 7)

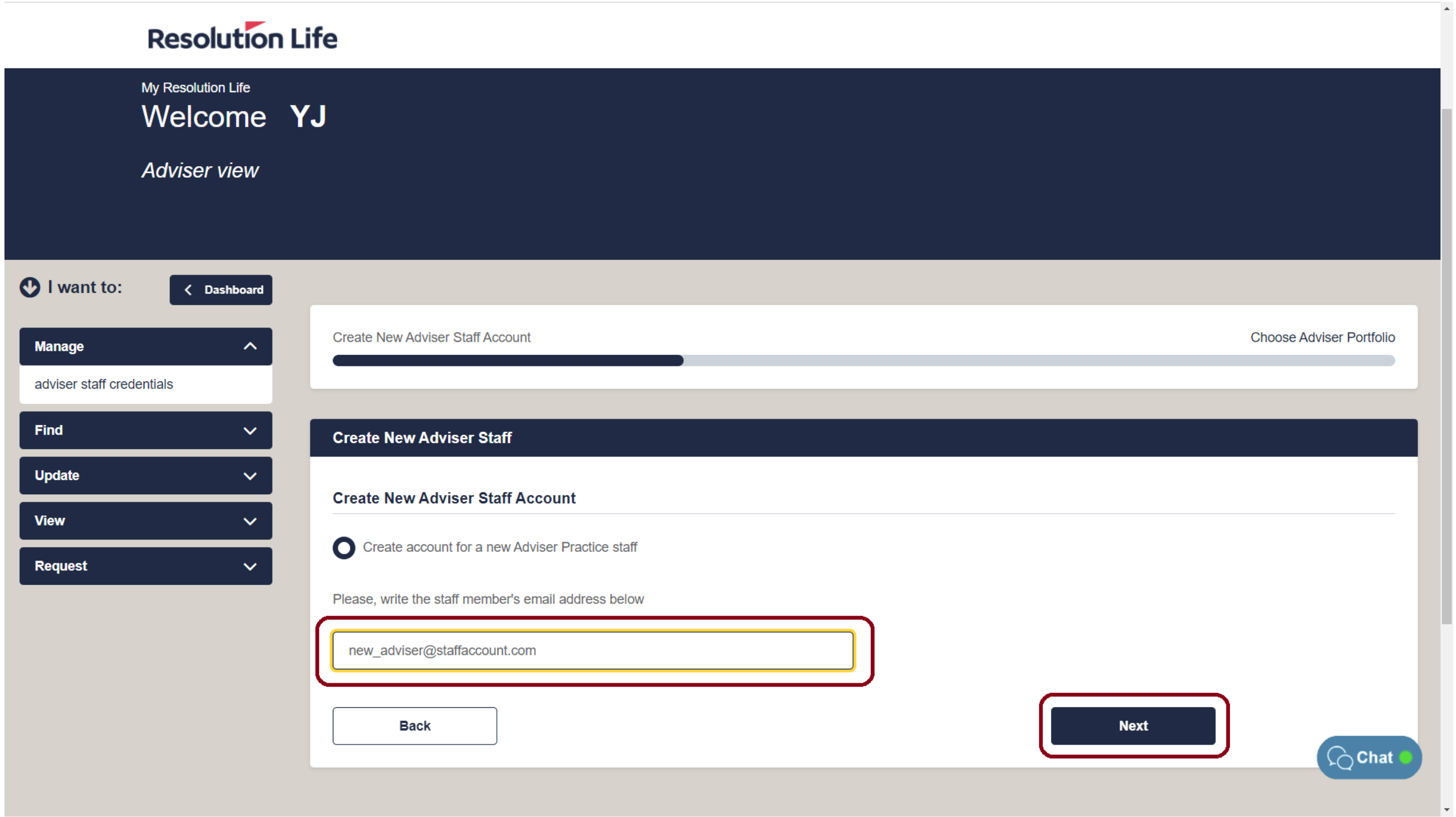
- Select the **[Create New Adviser Staff]** button in the top right-hand corner.



Resolution Life

Create new adviser staff (3 of 7)

- Enter the email address of the new staff member
- Select **[Next]**



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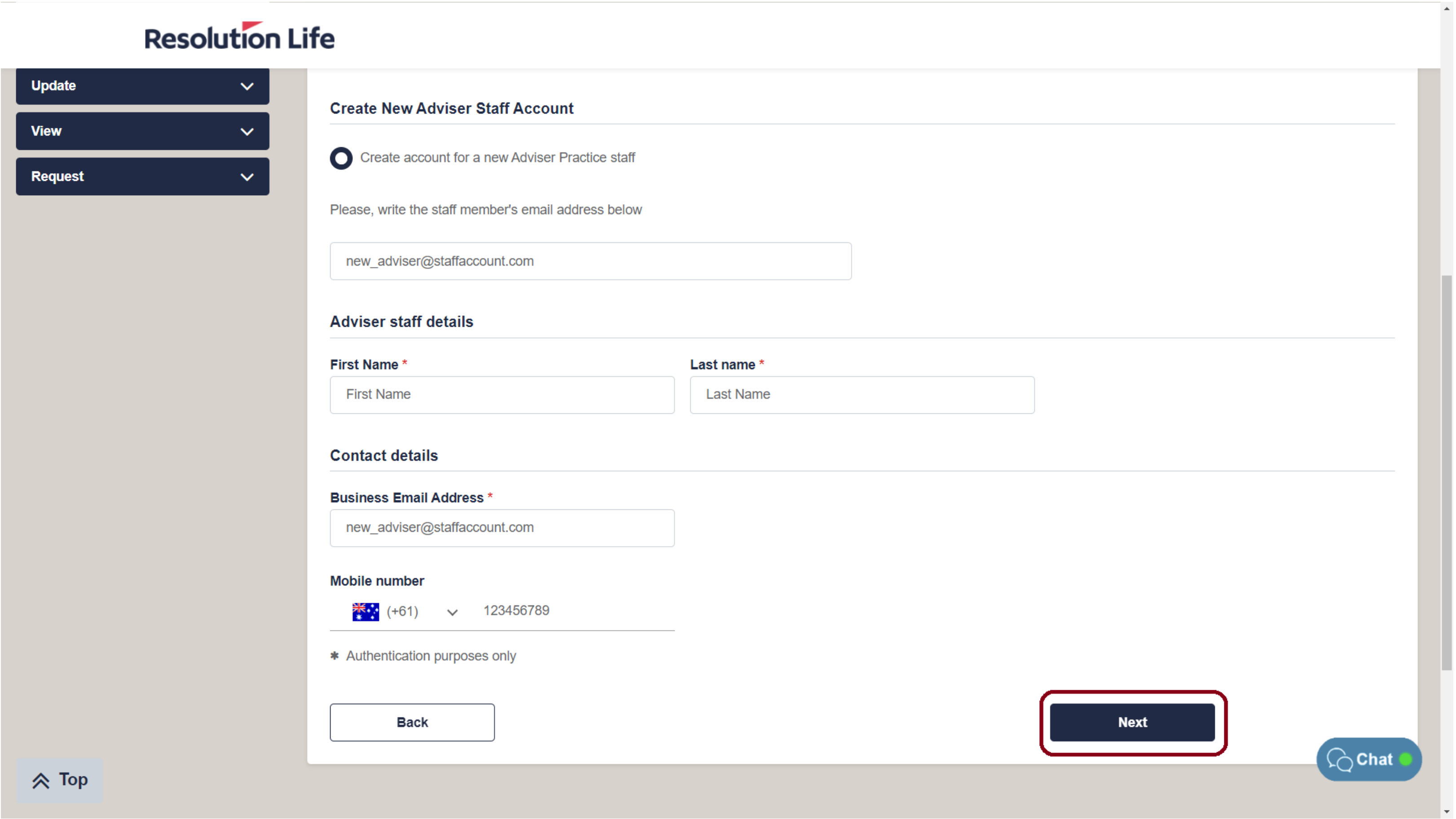
Create new adviser staff (4 of 7)

- Complete the name, email address, and mobile number fields of the new staff member
- Select **[Next]**



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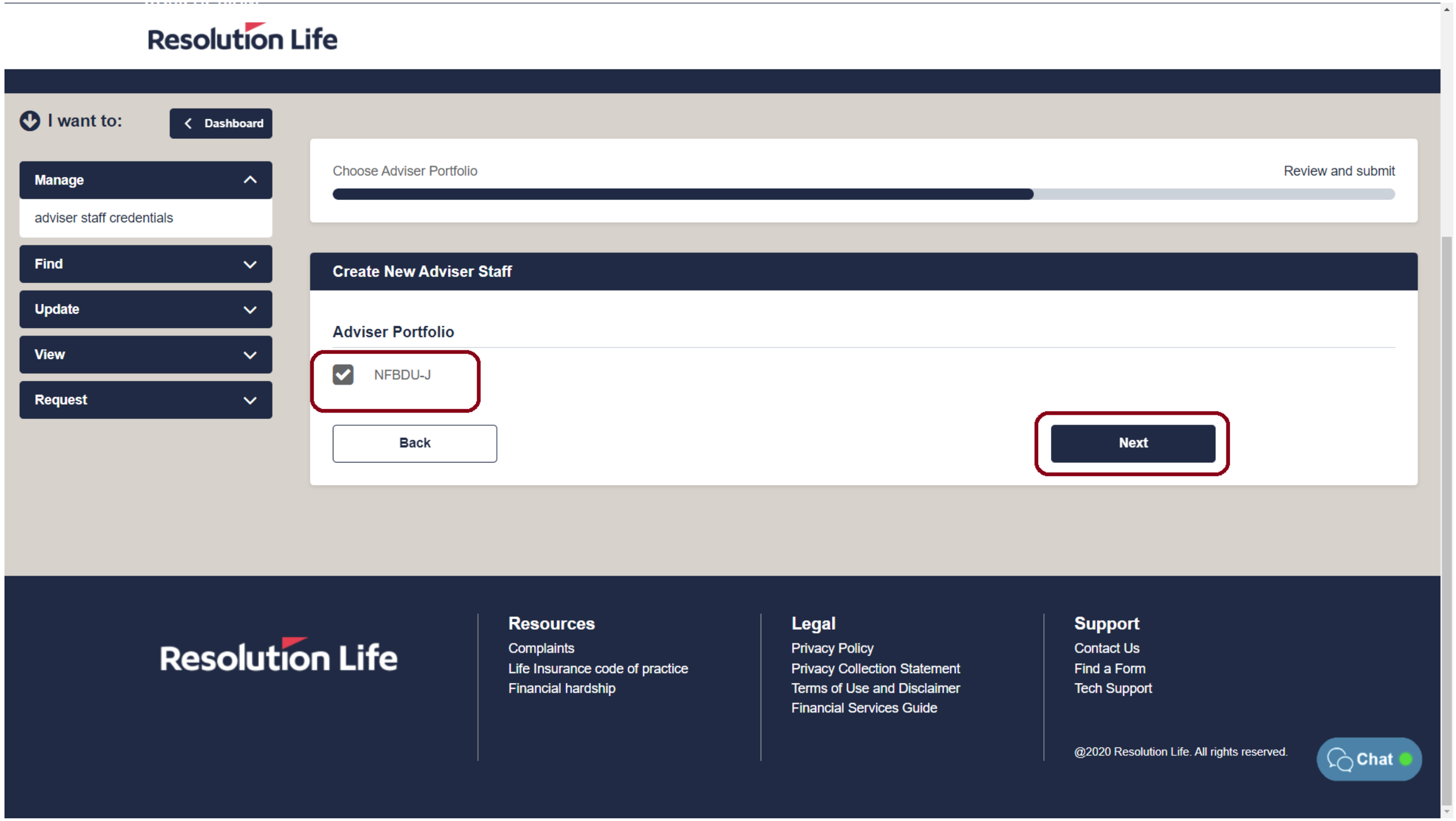
Create new adviser staff (5 of 7)

- Use the tick box to toggle Adviser Portfolio permissions
- Select **[Next]**



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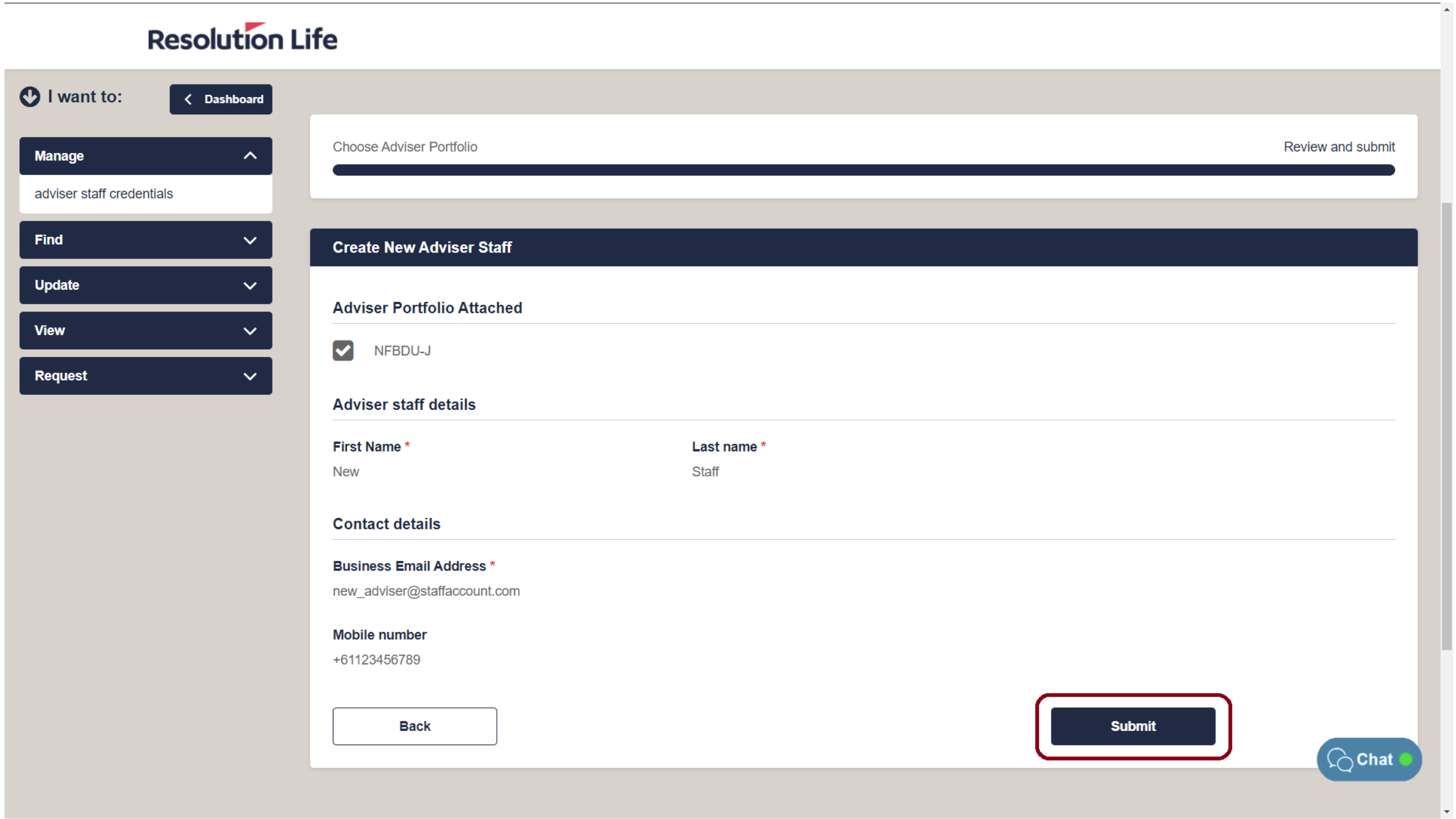
Resolution Life

Create new adviser staff (6 of 7)

- Review and ensure that the new staff details are correct.
- Select **[Submit]**



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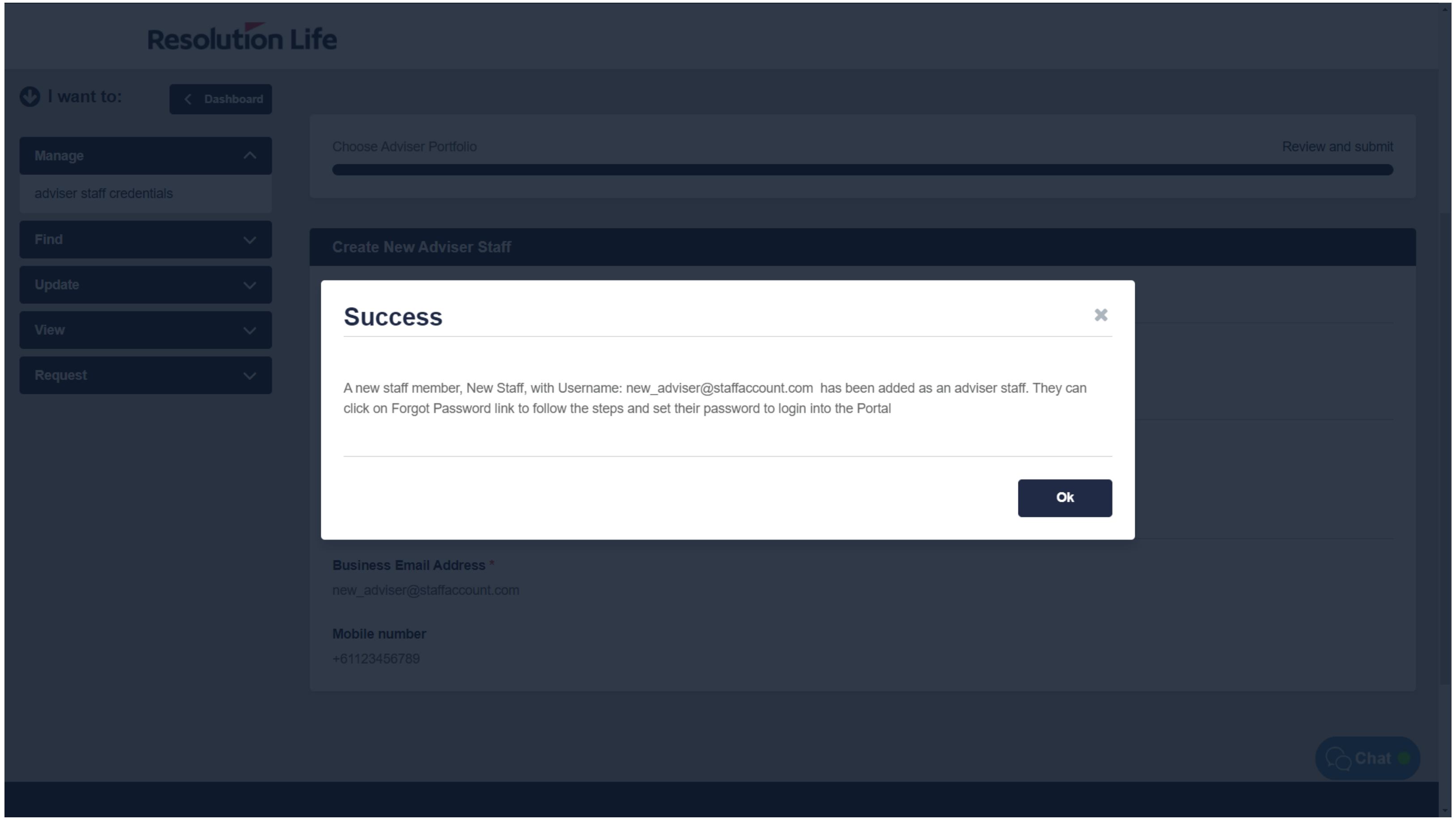
Create new adviser staff (7 of 7)

Confirmation of new staff member will display as per illustration.



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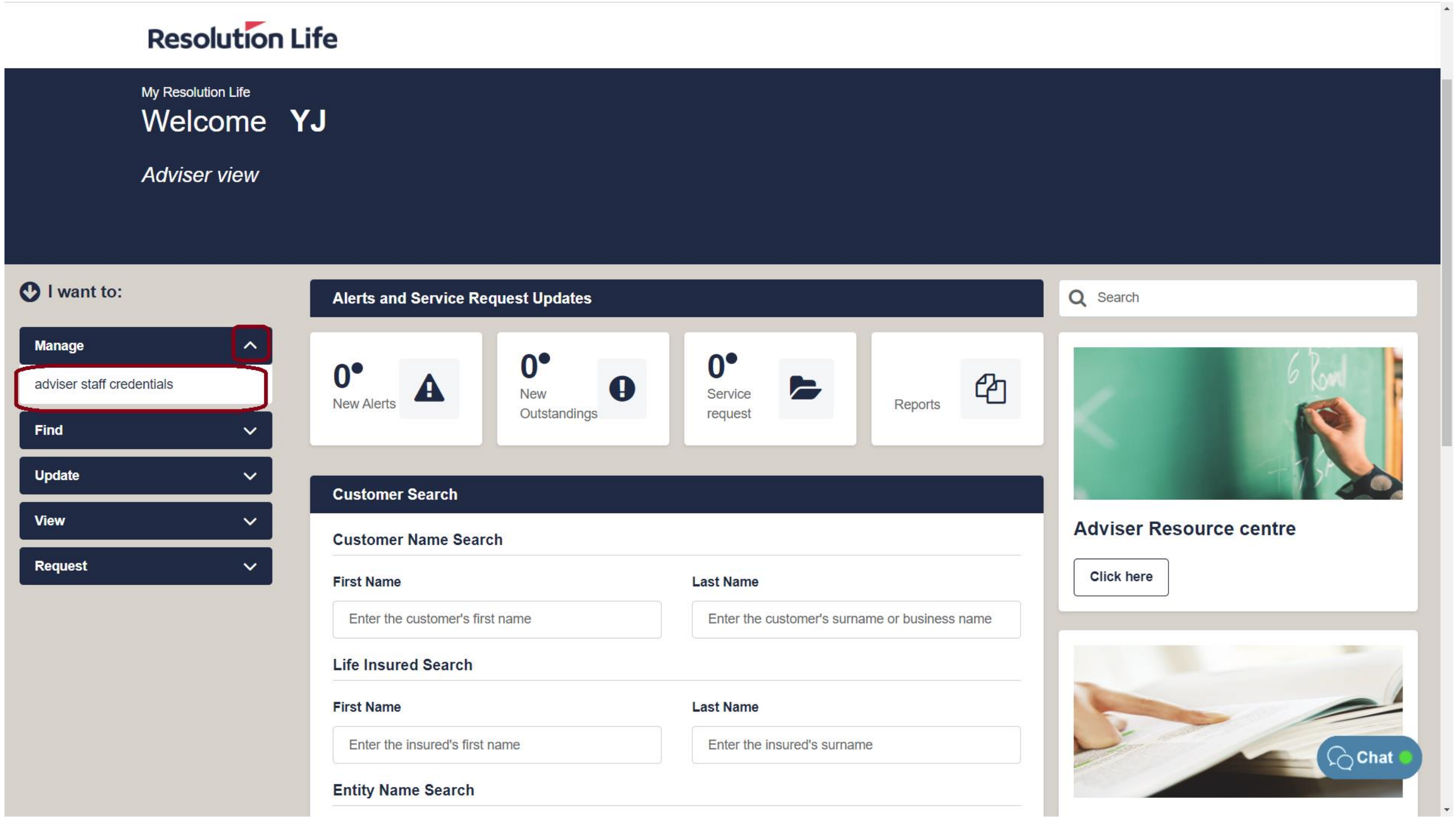
Home

Activate / Deactivate staff (1 of 3)

From the dashboard menu on the left of the **Adviser view** home screen:

- Select the drop-down icon on **Manage**
- Select **[adviser staff credentials]**



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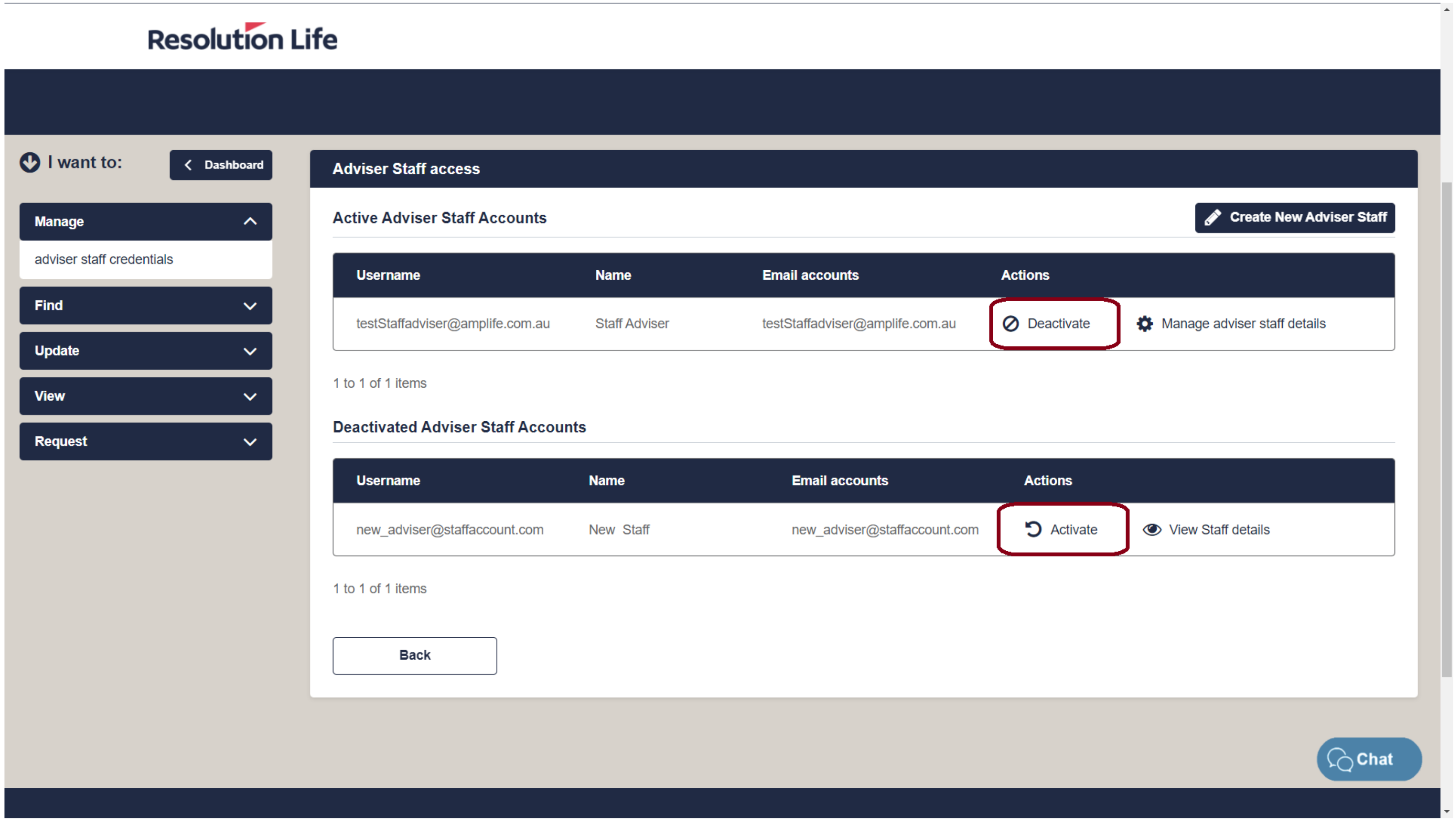
Activate / Deactivate staff (2 of 3)

In the **Actions** column:

- Select **[Activate]** to activate an account
- Select **[Deactivate]** to deactivate an account.



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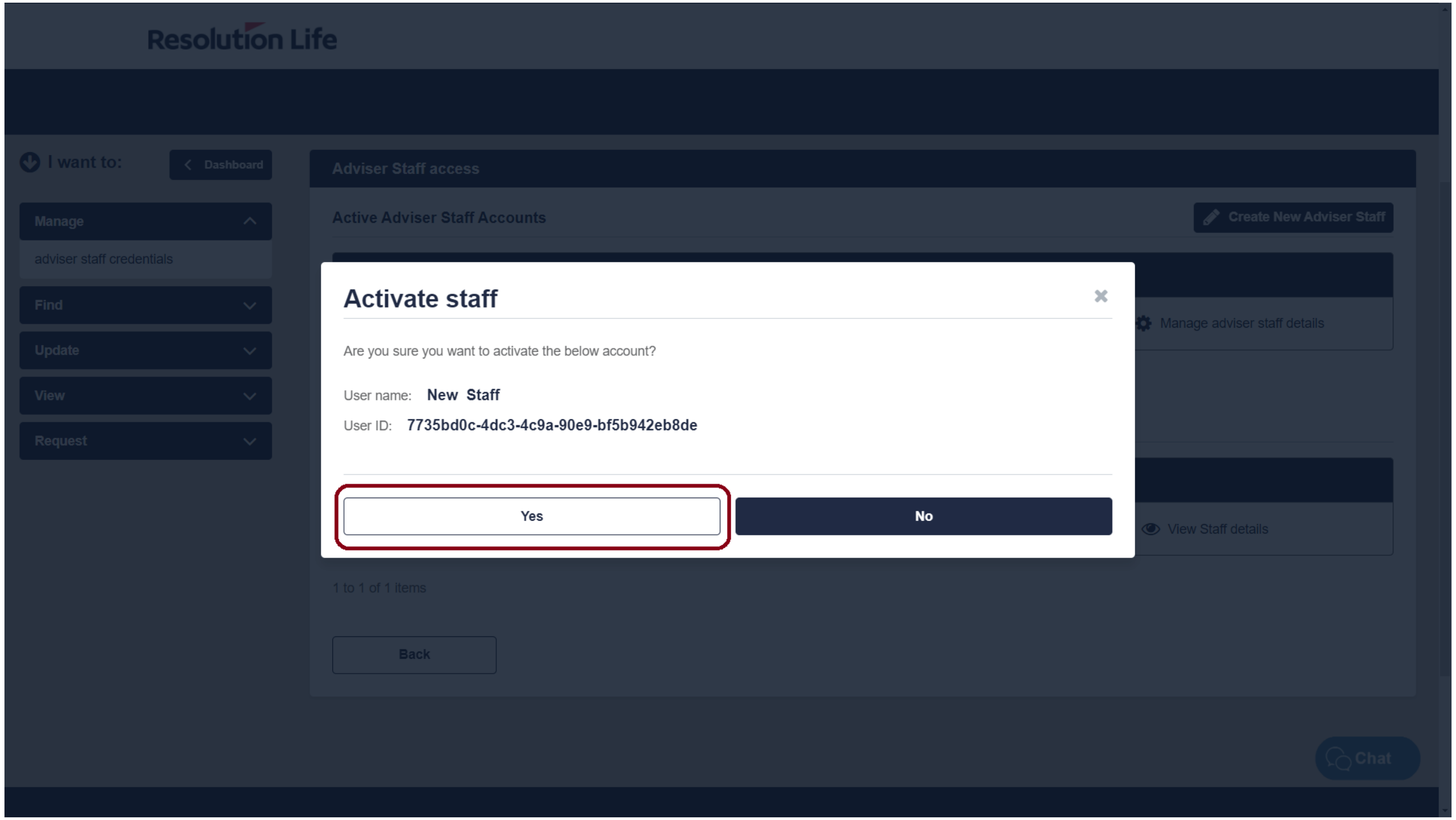
Activate / Deactivate staff (3 of 3)

- Select **[Yes]** to confirm



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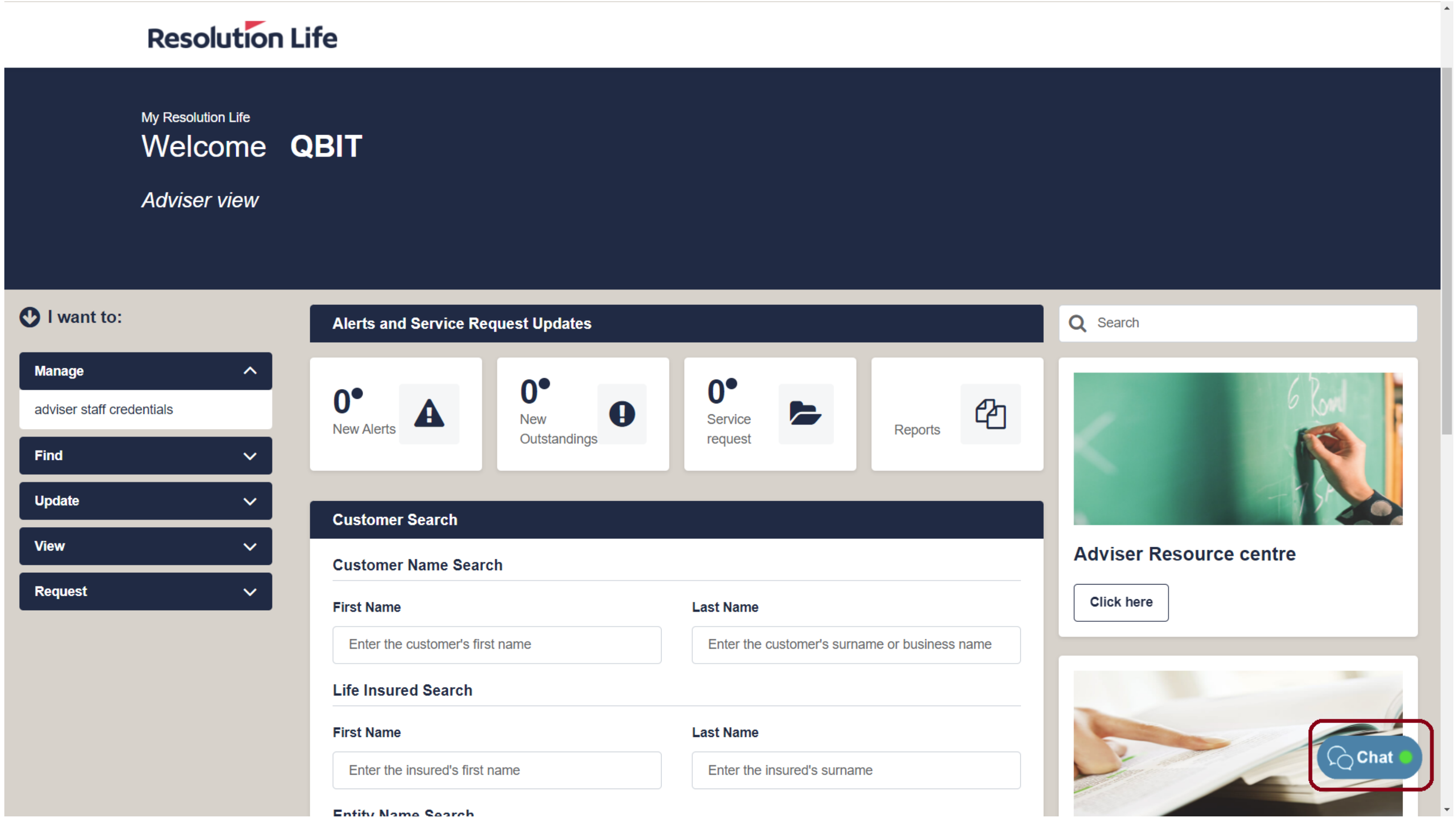
Resolution Life

Click to chat (1 of 3)

From any screen in My Resolution Life:

- Select the **[Chat]** button to access **Click to Chat.**



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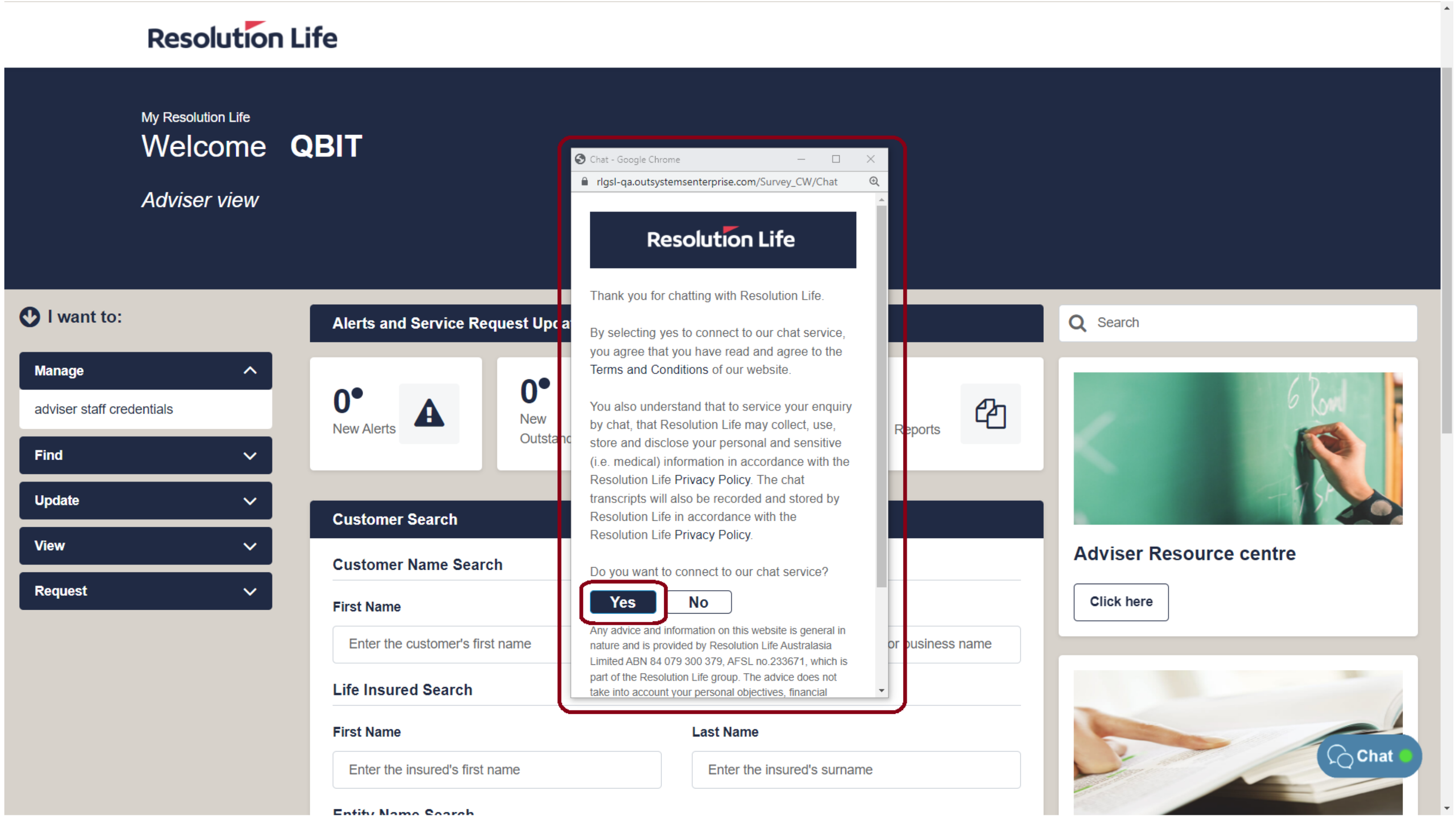
Resolution Life

Click to chat (2 of 3)

In the Chat pop-up window:

- Select the **[Yes]** button to confirm acceptance of the Click to Chat terms and conditions.



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Click to chat (3 of 3)

Click to Chat will connect to a virtual assistant as per illustration.