

My Resolution Life Adviser user guide

The screenshot displays the Resolution Life Adviser user interface. At the top, a teal banner reads "AMP Life is now Resolution Life". Below this, the Resolution Life logo is centered, with "My Resolution Life Welcome" and "Adviser view" text underneath. A navigation bar on the left lists "I want to:" with dropdown menus for "Manage", "Find", "Update", "View", and "Request". The main content area is titled "Alerts and Service Request Updates" and features four cards: "New Alerts" (0), "New Outstandings" (0), "Service request" (0), and "Reports". Below this is a "Customer Search" section with "Customer Name Search" and "Life Insured Search" forms, each with "First Name" and "Last Name" input fields. On the right, there is a search bar, an "Adviser Resource centre" with a "Click here" button, and a "Chat" button with a green indicator.

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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]**

Resolution Life

Customer Search

Customer Name Search

First Name: Enter the customer's first name

Last Name: Enter the customer's surname or business name

Life Insured Search

First Name: Enter the insured's first name

Last Name: Enter the insured's surname

Entity Name Search

Entity Name: Enter the entity name

Policy Search

Policy or Contract number: Enter a policy or contract number

Login Number

Login number: To view a full list of your customers please click on the button below
NFBDU-J

[Adviser Resource centre](#)

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[Business Services & Reporting](#)

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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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The screenshot shows the Resolution Life dashboard for an adviser. The header includes the Resolution Life logo, 'My Resolution Life', and a welcome message for 'YJ' in 'Adviser view'. Below the header, there is a navigation bar with 'I want to:' and a 'Dashboard' button. A search bar contains the text 'Search results for Adviser YJ ZSBFMYIDS MLE NIYVU'. On the left side, there is a 'Manage' dropdown menu with options: 'adviser staff credentials', 'Find', 'Update', 'View', and 'Request'. On the right side, there is a 'Download full customer list' button. The main content area displays a table of customer data with the following columns: Policy No., Product Name, Policy Start Date, Policy End Date, Policy Owner First Name, Policy Owner Last Name, Insurance Benefit Start Date, and Insurance Benefit End Date. The table contains 10 rows of data.

Policy No.	Product Name	Policy Start Date	Policy End Date	Policy Owner First Name	Policy Owner Last Name	Insurance Benefit Start Date	Insurance Benefit End Date
958994085	Growth Bond	27/01/2015	31/12/3000	Zbavl	SzEiml		
NK1002996T	Guaranteed Income Plan	17/11/1994	31/12/3000	Iamvli	Abki		
Q0573598-X	Term Insurance	24/01/1990	09/07/2023	Yaili	Himyl	24/01/1990	09/07/2023
958998785	Growth Bond	27/01/2015	31/12/3000	Iavjmeign	SzEiml		
Q0058240-A	Whole of Life Insurance Plan	14/07/1954	14/07/2032	Avluhmp	Nmtuyfmi	14/07/1954	14/07/2032
NK5485044J	Guaranteed Income Plan	17/09/2001	31/12/3000	Dbnl	Ump		
Q0574377-U	Term Insurance	15/02/1990	09/07/2023	Yaili	Himyl	15/02/1990	09/07/2023
NH5504927A	Guaranteed Income Plan	11/09/2004	31/12/3000	Iamvli	Riliup		
NK5504648T	Guaranteed Income Plan	09/09/2004	31/12/3000	Bfvia	Silhxbfgn		

[Next](#)

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

To download a CSV file of the customer list:

- Select [Download full customer list]

Resolution Life

My Resolution Life
Welcome YJ
Adviser view

I want to: [Dashboard](#)

Search results for Adviser YJ ZSBFMYIDS MLE NIYVU

[Download full customer list](#)

Policy No.	Product Name	Policy Start Date	Policy End Date	Policy Owner First Name	Policy Owner Last Name	Insurance Benefit Start Date	Insurance Benefit End Date
958994085	Growth Bond	27/01/2015	31/12/3000	Zbavl	SzEiml		
NK1002996T	Guaranteed Income Plan	17/11/1994	31/12/3000	Iamvli	Abki		
Q0573598-X	Term Insurance	24/01/1990	09/07/2023	Yaili	Himyi	24/01/1990	09/07/2023
958998785	Growth Bond	27/01/2015	31/12/3000	Iavjmeign	SzEiml		
Q0058240-A	Whole of Life Insurance Plan	14/07/1954	14/07/2032	Avluhmp	Nmtuyfмки	14/07/1954	14/07/2032
NK5485044J	Guaranteed Income Plan	17/09/2001	31/12/3000	Dbnl	Ump		
Q0574377-U	Term Insurance	15/02/1990	09/07/2023	Yaili	Himyi	15/02/1990	09/07/2023
NH5504927A	Guaranteed Income Plan	11/09/2004	31/12/3000	Iamvli	Riliup		
NK5504648T	Guaranteed Income Plan	09/09/2004	31/12/3000	Bfvia	Silixbfgn		

Chat

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]**

Resolution Life

0° New Alerts

0° New Outstandings

0° Service request

Reports

Customer Search

Customer Name Search

First Name
Enter the customer's first name

Last Name
Enter the customer's surname or business name

Life Insured Search

First Name
Enter the insured's first name

Last Name
Enter the insured's surname

Entity Name Search

Entity Name
Enter the entity name

Policy Search

Policy or Contract number
Enter a policy or contract number

Reset **Search**

Login Number

Login number To view a full list of your customers please click on the button below
X247166 [View all customers](#)

Adviser Resource centre
[Click here](#)

Marketing & Insights
[Click here](#)

Business Services & Reporting
[Click here](#)

[Chat](#)

Search by customer name (2 of 2)

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

The screenshot displays the Resolution Life Adviser view interface. At the top, the Resolution Life logo and 'Adviser view' are visible. On the left, a sidebar contains navigation options: 'I want to:' with a 'Dashboard' link, and a list of actions: 'Manage' (with a sub-menu for 'adviser staff credentials'), 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and shows 'Search results for customer'. It includes an 'Export to csv' button and a 'Show 25 results per page' dropdown. A table lists search results with columns for Policy, Address, Suburb, City, Post Code, State, and Country. The table contains six rows of data. Below the table, it indicates '1 to 6 of 6 items' and a 'Back to search' button.

		Policy	Address	Suburb	City	Post Code	State	Country	
Eikml	Qmarif	D306174855	111 Bailey St	TIMBOON		3268	VIC	AUS	🔍
H	Qmarif	V312,708T/3	16 PALMERSTON ROAD	LYSTERFIELD		3156	VIC	AUS	🔍
Noyn	Qmarif	V312,707T/5	16 THE BRIARS	LYSTERFIELD		3156	VIC	AUS	🔍
Noyn	Qmarif	V312,708T/3	16 THE BRIARS	LYSTERFIELD		3156	VIC	AUS	🔍
Noyn	Qmarif	V312,705T/9	16 THE BRIARS	LYSTERFIELD		3156	VIC	AUS	🔍
Z	Qmarif	V312,705T/9	16 PALMERSTON ROAD	LYSTERFIELD		3156	VIC	AUS	🔍

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]**

The screenshot displays the Resolution Life Customer Search dashboard. On the left, a sidebar contains navigation options: Manage (with a dropdown arrow), Find, Update, View, and Request (all with dropdown arrows). The main content area is titled "Alerts and Service Request Updates" and features four cards: "New Alerts" (0), "New Outstandings" (0), "Service request" (0), and "Reports". Below this is the "Customer Search" section, which includes four search categories: "Customer Name Search" (with First Name and Last Name fields), "Life Insured Search" (with First Name and Last Name fields, both highlighted with red boxes), "Entity Name Search" (with an Entity Name field), and "Policy Search" (with a Policy or Contract number field). At the bottom of the Policy Search section, there are "Reset" and "Search" buttons, with the "Search" button highlighted by a red box. On the right side of the dashboard, there is a search bar, a "Click here" button under "Adviser Resource centre", another "Click here" button under "Marketing & Insights", and a "Chat" button under "Business Services & Reporting".

Search by life insured (2 of 2)

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

The screenshot displays the Resolution Life Customer Search interface. On the left, there is a sidebar with navigation options: 'I want to:' (with a 'Dashboard' link), 'Manage', 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and shows 'Search results for customer'. It includes a 'Show 25 results per page' dropdown and an 'Export to csv' button. A table of search results is displayed, with columns for Policy, Address, Suburb, City, Post Code, State, and Country. The table contains 7 rows of data, each with a magnifying glass icon in the final column. Below the table, it indicates '1 to 7 of 7 items' and a 'Back to search' button.

		Policy	Address	Suburb	City	Post Code	State	Country	
Avlum	Dblh	H5263879-R				2517	NA	AUS	🔍
Avlum	Dblh	H5263879-R				2516	NA	AUS	🔍
Avlum	Dmimvhrv	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	Rmfmrbovh	NT5120649P				2500	NA	AUS	🔍

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]**

The screenshot shows the Resolution Life Customer Search dashboard. On the left, there are three dropdown menus: 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and contains several search sections: 'Customer Name Search' with 'First Name' and 'Last Name' fields; 'Life Insured Search' with 'First Name' and 'Last Name' fields; 'Entity Name Search' with an 'Entity Name' field (highlighted with a red box); 'Policy Search' with a 'Policy or Contract number' field; and 'Login Number' with a 'Login number' field and a 'View all customers' button. The 'Search' button is also highlighted with a red box. On the right side, there are three promotional cards: 'Adviser Resource centre', 'Marketing & Insights', and 'Business Services & Reporting', each with a 'Click here' button. At the bottom left, there is a 'Top' button, and at the bottom right, there is a 'Chat' button.

Search by entity name (2 of 2)

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

The screenshot displays the Resolution Life Customer Search interface. On the left, there is a sidebar with navigation options: 'I want to:' (with a 'Dashboard' link), 'Manage', 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and shows 'Search results for customer'. It includes a search bar with 'a form' entered, a 'Show 25 results per page' dropdown, and an 'Export to csv' button. A table of search results is displayed, with columns for Policy, Address, Suburb, City, Post Code, State, and Country. The table contains 7 rows of data, each with a magnifying glass icon in the final column. Below the table, it indicates '1 to 7 of 7 items' and a 'Back to search' button.

		Policy	Address	Suburb	City	Post Code	State	Country	
Avlum	Dblh	H5263879-R				2517	NA	AUS	🔍
Avlum	Dblh	H5263879-R				2516	NA	AUS	🔍
Avlum	Dmimvhrv	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	Rmfmrbovh	NT5120649P				2500	NA	AUS	🔍

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]**

The screenshot displays the Resolution Life Customer Search dashboard. On the left, there are three navigation options: Update, View, and Request, each with a dropdown arrow. The main content area is titled 'Customer Search' and contains several search sections: 'Customer Name Search' with fields for First Name and Last Name; 'Life Insured Search' with fields for First Name and Last Name; 'Entity Name Search' with an Entity Name field; and 'Policy Search' which is highlighted with a red box. The 'Policy Search' section includes a 'Policy or Contract number' field, a 'Reset' button, and a 'Search' button, both of which are also highlighted with red boxes. Below the 'Policy Search' section is a 'Login Number' section with a 'Login number' field and a 'View all customers' button. The dashboard also features a sidebar on the right with three sections: 'Adviser Resource centre' with a 'Click here' button, 'Marketing & Insights' with a 'Click here' button, and 'Business Services & Reporting' with a 'Click here' button. At the bottom left, there is a 'Top' button, and at the bottom right, there is a 'Chat' button.

Search by policy (2 of 2)

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

The screenshot displays the Resolution Life Customer Search interface. On the left, there is a sidebar with navigation options: 'I want to:' (with a 'Dashboard' link), 'Manage', 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and shows 'Search results for customer'. A table lists 7 search results, each with columns for Policy, Address, Suburb, City, Post Code, State, and Country. A 'Back to search' button is located at the bottom of the results list.

		Policy	Address	Suburb	City	Post Code	State	Country	
Avlum	Dblh	H5263879-R				2517	NA	AUS	🔍
Avlum	Dblh	H5263879-R				2516	NA	AUS	🔍
Avlum	Dmimvhrv	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	Rmfmrbovh	NT5120649P				2500	NA	AUS	🔍

View customer (1 of 2)

From the displayed list of Customer Search results:

- Select the view icon

Resolution Life

I want to: [Dashboard](#)

Manage ^
adviser staff credentials

Find v

Update v








View v

Request v

Customer Search

Search results for customer [Export to csv](#)

Show results per page

		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	

1 to 7 of 7 items

[Back to search](#)

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.

Resolution Life

My Resolution Life
Customer view

You have 0 new notifications

Name: Avlum Nmpih

Contact number:

Residential address

Contact Resolution Life

I want to: **Adviser View**

Select your product: **Whole of Life Insurance Plan**

Product Details

Policy number	H1560780-J	TFN held	N
Plan started	06/05/1987	Plan ends	06/05/2065
Premium indexed with inflation	N		

Avlum Nmpih		Avlum Nmpih	
Relationship type	Owner	Relationship type	Life Insured
Owner date of birth	26/11/1970	Insured date of birth	26/11/1970

Contract address		Insurance benefit start date	06/05/1987
Insurance benefit end date	06/05/2065	Policy anniversary	06/05/2021

Customer Resource centre

Click here

Marketing & Insights

Chat

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.

The screenshot displays the Resolution Life 'Customer view' interface. At the top, the Resolution Life logo is visible. Below it, a dark blue header contains the text 'My Resolution Life' and 'Customer view' (highlighted with a red box). A notification bar indicates 'You have 0 new notifications'. The user's name 'Avlum Nmpih' is displayed, along with fields for 'Contact number:' and 'Residential address:'. A 'Contact Resolution Life' button is present.

The main content area is titled 'I want to:' and includes a navigation menu with options: Find, Make, Provide, Request, Update, Apply, Transaction, and View. The selected product is 'Whole of Life Insurance Plan'. The 'Product Details' section shows the following information:

Policy number	H1560780-J	TFN held	N
Plan started	06/05/1987	Plan ends	06/05/2065
Premium indexed with inflation	N		

Below this, two summary cards for 'Avlum Nmpih' are shown:

Relationship type	Owner	Relationship type	Life Insured
Owner date of birth	26/11/1970	Insured date of birth	26/11/1970

Additional details include 'Contract address', 'Insurance benefit start date' (06/05/1987), 'Insurance benefit end date' (06/05/2065), and 'Policy anniversary' (06/05/2021).

On the right side, there is a search bar, a 'Customer Resource centre' with a 'Click here' button, and a 'Marketing & Insights' section with a 'Chat' button.

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)

The screenshot displays the Resolution Life dashboard. The 'Customer Search' section is highlighted with a red border. It contains the following search options:

- Customer Name Search:** Includes input fields for 'First Name' (placeholder: 'Enter the customer's first name') and 'Last Name' (placeholder: 'Enter the customer's surname or business name').
- Life Insured Search:** Includes input fields for 'First Name' (placeholder: 'Enter the insured's first name') and 'Last Name' (placeholder: 'Enter the insured's surname').
- Entity Name Search:** Includes an input field for 'Entity Name' (placeholder: 'Enter the entity name').
- Policy Search:** Includes an input field for 'Policy or Contract number' (placeholder: 'Enter a policy or contract number').








Below the search options are 'Reset' and 'Search' buttons. At the bottom of the search section, there is a 'Login Number' section with the text 'Login number To view a full list of your customers please click on the button below' and 'NAEIZ-J' next to a 'View all customers' button. On the right side of the dashboard, there are three promotional cards: 'Adviser Resource centre' with a 'Click here' button, 'Marketing & Insights' with a 'Click here' button, and 'Business Services & Reporting' with a 'Click here' button and a 'Chat' button. A 'Top' button is located at the bottom left of the dashboard.

Access Customer view (2 of 3)

From the displayed list of Customer Search results:

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

The screenshot displays the Resolution Life Customer Search interface. On the left, there is a sidebar with navigation options: 'I want to:' (with a 'Dashboard' link), 'Manage' (with 'adviser staff credentials'), 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Customer Search' and shows 'Search results for customer'. It includes a 'Show 25 results per page' dropdown and an 'Export to csv' button. A table lists search results with columns for Policy, Address, Suburb, City, Post Code, State, and Country. The first row is highlighted, and a red box highlights the magnifying glass icon in the 'View' column of that row. Below the table, it shows '1 to 7 of 7 items' and a 'Back to search' button.

	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	

Access Customer view (3 of 3)

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

The screenshot displays the Resolution Life 'Customer view' interface. At the top, the Resolution Life logo is centered. Below it, a dark blue header contains the text 'My Resolution Life' and 'Customer view' (highlighted with a red box). A notification bar indicates 'You have 0 new notifications'. User details include Name: Avlum Nmpih, Contact number, and Residential address. A 'Contact Resolution Life' button is on the right. The main content area is titled 'Whole of Life Insurance Plan' and includes a search bar. A left sidebar lists actions: Find, Make, Provide, Request, Update, Apply, Transaction, and View. The central 'Product Details' section shows:

Policy number	H1560780-J	TFN held	N
Plan started	06/05/1987	Plan ends	06/05/2065
Premium indexed with inflation	N		

Below this, two boxes for 'Avlum Nmpih' show relationship types and dates:

Relationship type	Owner	Relationship type	Life Insured
Owner date of birth	26/11/1970	Insured date of birth	26/11/1970

Additional details include Contract address, Insurance benefit start date (06/05/1987), Insurance benefit end date (06/05/2065), and Policy anniversary (06/05/2021). The right sidebar features a 'Customer Resource centre' with a 'Click here' button and a 'Marketing & Insights' section with a 'Chat' button.

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]**

The screenshot displays the Resolution Life dashboard interface. At the top, the Resolution Life logo is visible. Below it, the user is greeted with 'My Resolution Life Welcome XIYYTC' and 'Adviser view'. The main content area is divided into several sections:

- Left Sidebar:** A vertical menu titled 'I want to:' with options: Manage, Find, a form (highlighted with a red box), Update, View, and Request. Each option has a small downward arrow icon.
- Alerts and Service Request Updates:** A section with four cards: 'New Alerts' (0), 'New Outstandings' (0), 'Service request' (0), and 'Reports'.
- Customer Search:** A section with three search forms: 'Customer Name Search' (with First Name and Last Name fields), 'Life Insured Search' (with First Name and Last Name fields), and 'Entity Name Search'.
- Right Sidebar:** A search bar, an 'Adviser Resource centre' with a 'Click here' button, and a 'Chat' button.

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.

The screenshot shows the Resolution Life user interface. At the top, the Resolution Life logo is on the left, and the user's name 'XIIYYTC' is displayed in the center. Below the name, it says 'Welcome' and 'Adviser view'. A 'Contact Resolution Life' button is on the right. A sidebar on the left contains navigation options: 'I want to:' with a 'Dashboard' link, and buttons for 'Manage', 'Find', 'Update', 'View', and 'Request'. The 'Find' button is active, showing a search input with 'a form' and a 'Customer search' button highlighted with a red box. The main content area is titled 'Forms' and contains the heading 'Find a Resolution Life Form'. Below this, there is a message: 'If you wish to find a form related to a specific customer please use the customer search function below to go into their profile. This could be quicker.' The 'Customer search' button is highlighted with a red box. Below this, there is an alternative search method: 'Alternatively, to search across all forms, please enter a keyword below.' This includes a search input field with a magnifying glass icon and a 'Search Form' button. The 'Forms search results' section shows 'Showing 8 results.' and a table with two rows of results. The first row is for 'Paper' type, 'Abbreviated personal statement (interactive) (Form 07068)', with a 'View' button. The second row is for 'Paper' type, 'AERG (Form 28431)', with a 'View' button. A 'Chat' button is visible in the bottom right corner.

Resolution Life

My Resolution Life
Welcome **XIIYYTC**
Adviser view

Contact Resolution Life

I want to: [Dashboard](#)

- Manage
- Find
- Update
- View
- Request

Find a Resolution Life Form

If you wish to find a form related to a specific customer please use the customer search function below to go into their profile. This could be quicker.

Customer search

Alternatively, to search across all forms, please enter a keyword below.

Search Search Form

Forms search results
Showing 8 results.

Form Type	Name and description	
Paper	Abbreviated personal statement (interactive) (Form 07068)	View
Paper	AERG (Form 28431)	View

Chat

Find a form (3 of 4)

Alternatively:

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

Resolution Life

Contact Resolution Life

I want to: [Dashboard](#)

Manage

Find

a form

Update

View

Request

Forms

Find a Resolution Life Form

If you wish to find a form related to a specific customer please use the customer search function below to go into their profile. This could be quicker:

[Customer search](#)

Alternatively, to search across all forms, please enter a keyword below:

[Search Form](#)

Forms search results

Showing 8 results.

Form Type	Name and description	
Paper	Abbreviated personal statement (interactive) (Form 07068)	View
Paper	AERG (Form 28431)	View
Paper	Alteration request (Form 80019.1_RL)	View

Chat

Find a form (4 of 4)

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

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

The screenshot displays the Resolution Life website's search results for forms. The page title is "Forms search results" and it indicates "Showing 8 results." The results are presented in a table with two columns: "Form Type" and "Name and description". Each row includes a "View" button to the right of the description. The third row, "Application for increase or alteration (Form 90393_RL)", has its "View" button highlighted with a red rectangular box. A "Top" button is visible in the bottom left corner of the search results area, and a "Chat" button is in the bottom right corner.

Form Type	Name and description	View
Paper	AMP Group insurance reinstatement application (NS7580)	View
Paper	AMP Group insurance reinstatement application (NS7580_IIS)	View
Paper	Application for increase or alteration (Form 90393_RL)	View
Paper	Application for reinstatement – Elevate (Form 02107_IIS_RL)	View
Paper	Application for reinstatement – Elevate (Form 02107_RL)	View
Paper	Application for Reinstatement (Form 904262_IIS_AMP)	View
Paper	Application for Reinstatement (Form 904262_IIS_RL)	View
Paper	Application for reinstatement (Form 904262_RL)	View

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)

Resolution Life

View

Request

Customer Search

Customer Name Search

First Name: Enter the customer's first name

Last Name: Enter the customer's surname or business name

Life Insured Search

First Name: Enter the insured's first name

Last Name: Enter the insured's surname

Entity Name Search

Entity Name: Enter the entity name

Policy Search

Policy or Contract number: Enter a policy or contract number

Reset Search

Login Number

Login number To view a full list of your customers please click on the button below

NAEIZ-J [View all customers](#)

[Adviser Resource centre](#) Click here

[Marketing & Insights](#) Click here

[Business Services & Reporting](#) Click here

Chat

[Top](#)

View transaction history (2 of 4)

From the displayed list of Customer Search results:

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








Resolution Life

I want to: [Dashboard](#)

Customer Search

Search results for customer [Export to csv](#)

Show results per page

		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	

1 to 7 of 7 items

[Back to search](#)

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**

The screenshot shows the Resolution Life Customer view dashboard. At the top, the Resolution Life logo is on the left, and the user's name 'S Aivyn' and contact number '+61' are displayed. The residential address is '11 NICHOLSON AVE'. A notification banner indicates 'You have 0 new notifications'. Below this, the user is logged in as 'Adviser View' for an 'Open Ended Lifestyle Protection Plan'. A cascading menu is open, showing options: Find, Make, Provide, Request, Update, Apply, Transaction, and View. The 'Transaction Details' option is highlighted with a red box. To the right of the menu is a search bar and a 'Customer Resource centre' section with a 'Click here' button. At the bottom right, there is a 'Chat' button. A note at the bottom of the dashboard states: 'Please Note: Over the coming eight weeks we will be enhancing the information you see on this dashboard including adding more data about your policy, fixing reported issues such as residential address inaccuracies, and improving user experience.'

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.

The screenshot displays the Resolution Life customer portal interface. At the top, the Resolution Life logo is on the left, and a notification bell icon indicates '0 You have 0 new notifications'. The user's name 'S Aivyn' is shown, along with contact number '+61' and residential address '11 NICHOLSON AVE'. A 'Contact Resolution Life' button is on the right.

The main content area is titled 'I want to: < Adviser View'. Below this is a vertical list of action buttons: Find, Make, Provide, Request, Update, Apply, Transaction, and View, each with a dropdown arrow.

The central section is for 'Open Ended Lifestyle Protection Plan'. It includes a 'Filter by date' section with three radio button options: 'Select Date Range' (selected), 'Select Financial Year', and 'Select last 30, 60 or 90 days'. To the right of these options are 'From' and 'To' date pickers with calendar icons, showing dates '2020-05-17' and '2022-05-16' respectively. A note below the pickers states 'Maximum 24 months data available'. Below the filter section are 'Clear filters' and 'Apply' buttons.

The main content area below the filters shows 'No results found.' and a list of expandable sections: Product Details, Transaction Details, Investment details, Insurance details, Payments, Premiums and Fees, Payment Details, and Financial Adviser details.

On the right side, there is a search bar and two promotional cards: 'Customer Resource centre' with a 'Click here' button and 'Marketing & Insights' with a 'Click here' button and a 'Chat' button.

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)

Resolution Life

View

Request

Customer Search

Customer Name Search

First Name Last Name

Life Insured Search

First Name Last Name

Entity Name Search

Entity Name

Policy Search

Policy or Contract number

Login Number

Login number To view a full list of your customers please click on the button below
NAEIZ-J

View customer notifications (2 of 3)

From the displayed list of Customer Search results:

- Identify the correct customer record
- Select the view icon

Resolution Life

I want to: [Dashboard](#)

Manage ^
adviser staff credentials

Find v

Update v








View v

Request v

Customer Search

Search results for customer [Export to csv](#)

Show results per page

		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	

1 to 7 of 7 items

[Back to search](#)

View customer notifications (3 of 3)

Within **Customer view**:

- Select the bell icon
- Notifications will display

Resolution Life

My Resolution Life

Customer view

You have 0 new notifications

Name: **Avlum Nmpih** Contact number: Residential address [Contact Resolution Life](#)

I want to: [Adviser View](#)

- Find
- Make
- Provide
- Request
- Update
- Apply
- Transaction
- View

Select your product: **Whole of Life Insurance Plan**

Product Details

Policy number	TFN held
H1560780-J	N
Plan started	Plan ends
06/05/1987	06/05/2065
Premium indexed with inflation	
N	

Avlum Nmpih	Avlum Nmpih
Relationship type: Owner	Relationship type: Life Insured
Owner date of birth: 26/11/1970	Insured date of birth: 26/11/1970

Search here

Customer Resource centre
[Click here](#)

Chat

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)

Resolution Life

Customer Search

Customer Name Search

First Name **Last Name**

Life Insured Search

First Name **Last Name**

Entity Name Search

Entity Name

Policy Search

Policy or Contract number

Login Number

Login number To view a full list of your customers please click on the button below

NAEIZ-J

[Adviser Resource centre](#)

[Marketing & Insights](#)

[Business Services & Reporting](#)

[Top](#)

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

Resolution Life

I want to: [Dashboard](#)

Manage ^
adviser staff credentials

Find v

Update v








View v

Request v

Customer Search

Search results for customer [Export to csv](#)

Show results per page

		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	

1 to 7 of 7 items

[Back to search](#)

View customer statements and correspondence (3 of 4)

Within **Customer view**:

- Select the bell icon
- Notifications will display

Resolution Life

My Resolution Life

Customer view

You have 0 new notifications

Name: **Avlum Nmpih** Contact number: Residential address [Contact Resolution Life](#)

I want to: [Adviser View](#)

Select your product: **Whole of Life Insurance Plan**

Product Details

Policy number	TFN held
H1560780-J	N
Plan started	Plan ends
06/05/1987	06/05/2065
Premium indexed with inflation	
N	

Avlum Nmpih

Relationship type	Owner
Owner date of birth	26/11/1970

Avlum Nmpih

Relationship type	Life Insured
Insured date of birth	26/11/1970

Search here

[Click here](#)

Chat

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.

Resolution Life

Dashboard > Statements & Correspondence

Notifications

Select below which notification you want to read.

Notifications
My Alerts

Notifications
New Statements & Correspondence

Notifications
General Notifications

Statements & correspondence

Statement delivery method: Electronically

[Update your communication preferences](#)

Date	Correspondence Type	Policy Number	Product Name	Action
There are no statements and correspondence for this contract				

[Back](#)

[Chat](#)

View missed payment reports (1 of 2)

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

- Select **[Reports]**

The screenshot shows the Resolution Life Adviser view dashboard. At the top, the Resolution Life logo is displayed. Below it, the text 'My Resolution Life' and 'Welcome YJ' is shown, followed by 'Adviser view'. The main content area is divided into several sections. On the left, there is a sidebar with a 'I want to:' dropdown menu containing options: Manage (with an up arrow), Find (with a down arrow), Update (with a down arrow), View (with a down arrow), and Request (with a down arrow). The 'Manage' option is expanded, showing 'adviser staff credentials'. The main content area features a 'Alerts and Service Request Updates' section with four tiles: 'New Alerts' (0), 'New Outstandings' (0), 'Service request' (0), and 'Reports' (0). The 'Reports' tile is highlighted with a red box. Below this is a 'Customer Search' section with three search forms: 'Customer Name Search' (with 'First Name' and 'Last Name' fields), 'Life Insured Search' (with 'First Name' and 'Last Name' fields), and 'Entity Name Search'. On the right side, there is a search bar and a 'Click here' button. Below the search bar, there is a 'Adviser Resource centre' section with a 'Click here' button. At the bottom right, there is a 'Chat' button.

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

[Back](#)

The screenshot displays the Resolution Life Business Services & Reporting dashboard. The main heading is "Business Services & Reporting". Below this, there is a navigation bar with "I want to:" and a "Dashboard" button. The breadcrumb trail shows "Dashboard > Reports". The main content area is titled "Reports" and features a section for "Missed Payments". This section includes a table with columns for "Report Date", "Client Name", "Correspondence Type", "Date", "Status", and "Policy Number". The table currently shows "No items to show...". The footer contains the Resolution Life logo, a "Resources" section with links for "Complaints", "Life Insurance code of practice", and "Financial hardship"; a "Legal" section with links for "Privacy Policy", "Privacy Collection Statement", "Terms of Use and Disclaimer", and "Financial Services Guide"; and a "Support" section with links for "Contact Us", "Find a Form", and "Tech Support". A "Chat" button is also present in the bottom right corner.

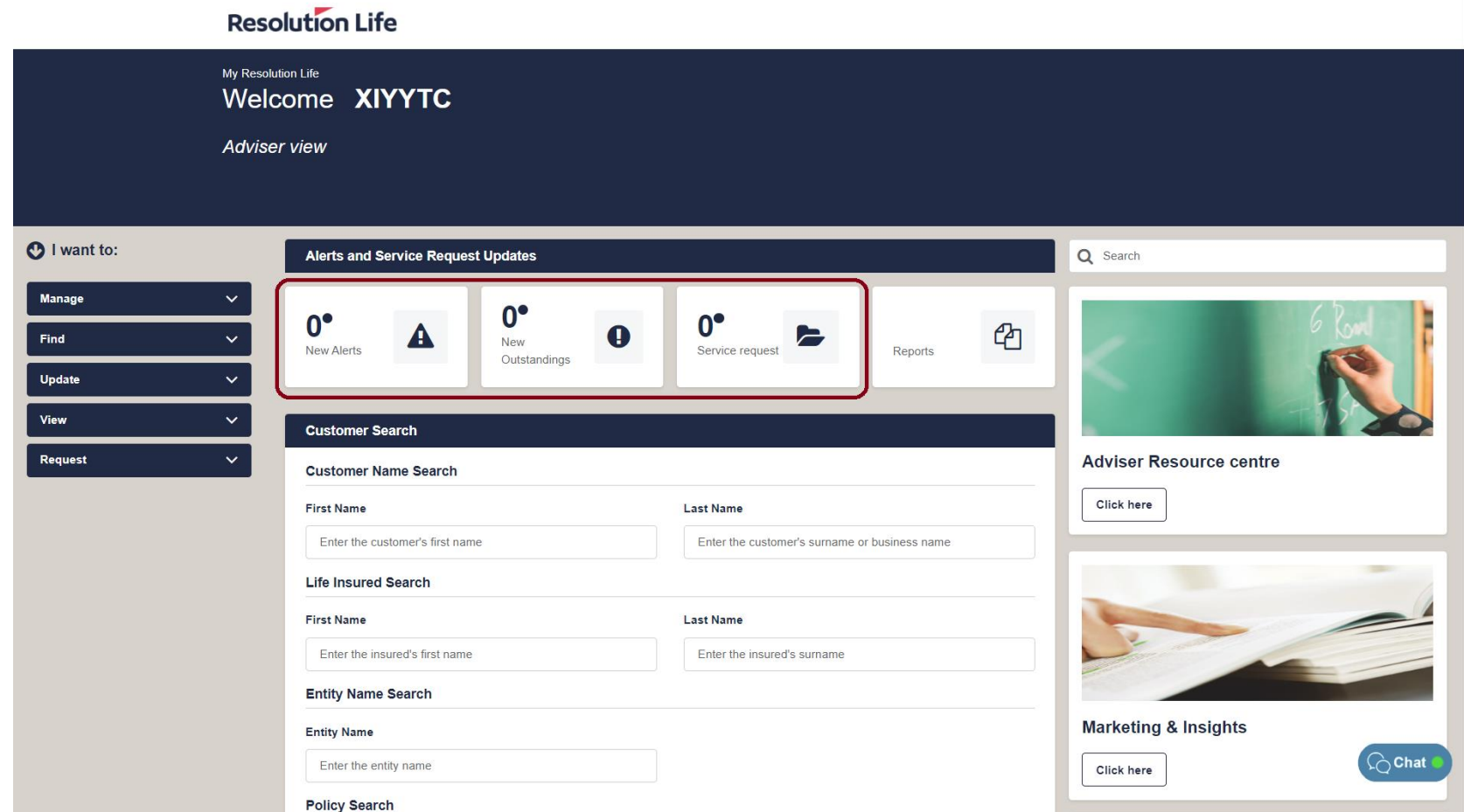
New Service Requests and Outstandings (1 of 1)

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

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



Resolution Life

My Resolution Life
Welcome **XIYYTC**
Adviser view

I want to:

- Manage
- Find
- Update
- View
- Request

Alerts and Service Request Updates

0° New Alerts

0° New Outstandings

0° Service request

Reports

Search

Adviser Resource centre

Click here

Marketing & Insights

Click here

Chat

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

The screenshot shows the Resolution Life Adviser view dashboard. At the top, it says "Resolution Life" and "My Resolution Life Welcome XIYYTC Adviser view". Below this is a navigation bar with "I want to:" and a list of actions: Manage, Find, Update, View, and Request. The main content area is divided into two sections: "Alerts and Service Request Updates" and "Customer Search". The "Alerts and Service Request Updates" section contains four tiles: "New Alerts", "New Outstandings", "Service request" (highlighted with a red box), and "Reports". The "Customer Search" section contains three search forms: "Customer Name Search", "Life Insured Search", and "Entity Name Search". On the right side, there is a search bar, a "Adviser Resource centre" tile with a "Click here" button, and a "Marketing & Insights" tile with a "Click here" button and a "Chat" button.

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.

[Back](#)[Next](#)

The screenshot displays the Resolution Life Service Request management interface. At the top, there are three navigation cards: 'View Alerts' with a bell icon and a notification badge, 'View Outstandings' with a bar chart icon and a notification badge, and 'View Service requests' with a briefcase icon and a notification badge. Below these is the 'Service Request' section, which includes tabs for 'Current' and 'Archived', and a search bar for 'Customer name or Policy number'. A table lists service requests with columns for Date, ID, Customer, Type, Product, Policy Number, Status, and View. The first row shows a request from 01/04/2022 with ID 5000128659, customer Gblp Rmfmrbohvh, product FLP Death, TPD & Trauma, and policy number NT5120646L. The status is 'In Progress' and the 'View' link is highlighted with a red box. Below the table is an 'Export Report' button and a 'Search filter' section with 'From' and 'To' date pickers, a 'Recent days' slider set to 90, and dropdown menus for 'Status' and 'Type'. At the bottom, there are 'Back', 'Clear Filters', and 'Apply' buttons, and an 'Important notes' section with a chat button in the bottom right corner.

Date	ID	Customer	Type	Product	Policy Number	Status	View
01/04/2022 15:05:52	5000128659	Gblp Rmfmrbohvh		FLP Death, TPD & Trauma	NT5120646L	In Progress	View

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

[Back](#)

Service request

Select below which service you want to read.

Service request ID: 5000126659

Status: **In Progress**

Type:

Date created: 01/04/2022	Date last updated: 01/04/2022	Estimated completion date: 06/04/2022	Closed date: -
------------------------------------	---	---	--------------------------

Request details

Request ID: 5000126659	Product: FLP Death, TPD & Trauma	Policy Number: NT5120646L	Type:	Area: Register New Claim	Sub-area:
----------------------------------	--	-------------------------------------	--------------	------------------------------------	------------------

Customer details

Title:	Company: -	Surname: Rmfmrbohvh	First name: Rmfmrbohvh
---------------	----------------------	-------------------------------	----------------------------------

Contact details

Home number:	Work number:	Mobile number: 0418110037	Email:	Address:
---------------------	---------------------	-------------------------------------	---------------	-----------------

[Chat](#)[Next](#)

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

Resolution Life

Comments

Created:	Comments on service request/outstanding:	Type:	Created by:
No records displayed			

[Add new comment](#)

Documents

Please attach any supporting documents you find relevant

[Browse to upload files](#)

* Document must be a picture file (.jpg, .tiff, .png) or a pdf and have a max size of 2MB

Milestones

Date created:	Description:
01/04/2022	Case created by RLCC_W
01/04/2022	Awaiting Allocation

[Back](#) [Update](#)

[Top](#) [Chat](#)

Update an Outstanding (1 of 4)

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

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

The screenshot shows the Resolution Life Adviser view dashboard. At the top, the Resolution Life logo is on the left, and the user's name 'Welcome XIYYTC' and 'Adviser view' are on the right. Below the header, there is a navigation bar with 'I want to:' and a search bar. The main content area is divided into several sections. On the left, there is a sidebar with 'Manage' (adviser staff credentials), 'Find', 'Update', 'View', and 'Request' options. The central area features 'Alerts and Service Request Updates' with four tiles: 'New Alerts', 'New Outstandings' (highlighted with a red box), 'Service request', and 'Reports'. Below this is the 'Customer Search' section with three search forms: 'Customer Name Search', 'Life Insured Search', and 'Entity Name Search'. On the right, there is an 'Adviser Resource centre' with a 'Click here' button and a 'Marketing & Insights' section with a 'Chat' button.

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.

[Back](#)[Next](#)

Resolution Life

View Alerts 0

View Outstandings 0

View Service requests 0

Outstandings

Current Archived

Search for Customer name or Policy number

Date	ID	Customer	Type	Product	Policy Number	Status	View
01/04/2022 15:05:52	5000126659	Gblp Rmfmrbohvh		FLP Death, TPD & Trauma	NT5120646L	In Progress	View

Export Report 1 to 1 of 1 Service Requests

Search filter

From: Select To: Select Recent days: 1 to 90

Status: Select Type: Select

Back Clear Filters Apply

Important notes

- Information on this page is generally as at the close of the previous business day.
- Balance information is indicative and may depend on additional factors. Please refer to the account summary page for specific notes relevant to your product.

Chat

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

Resolution Life

Outstandings

Select below which service you want to read.

Outstanding ID: 5000126659

Status: **In Progress**

Type:

Date created:	Date last updated:	Estimated completion date:	Closed date:
01/04/2022	01/04/2022	06/04/2022	-

Request details

Request ID: 5000126659	Product: FLP Death, TPD & Trauma	Policy Number: NT5120646L	Type:	Area: Register New Claim	Sub-area:
----------------------------------	--	-------------------------------------	--------------	------------------------------------	------------------

Customer details

Title:	Company: -	Surname: Rmfmrbohvh	First name: Rmfmrbohvh
---------------	----------------------	-------------------------------	----------------------------------

Contact details

Home number:	Work number:	Mobile number: 0418110037	Email:	Address:
---------------------	---------------------	-------------------------------------	---------------	-----------------

[Chat](#)

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

Resolution Life

Comments

Created:	Comments on service request/outstanding:	Type:	Created by:
No records displayed			

[Add new comment](#)

Documents

Please attach any supporting documents you find relevant

[Browse to upload files](#)

* Document must be a picture file (.jpg, .tiff, .png) or a pdf and have a max size of 2MB

Milestones

Date created:	Description:
01/04/2022	Case created by RLCC_W
01/04/2022	Awaiting Allocation

[Back](#) [Update](#) [Chat](#)

[Top](#)

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.

[Back](#)

The screenshot displays the Resolution Life Service Requests dashboard. At the top, there are three buttons: 'View Alerts' (with a bell icon and '0'), 'View Outstandings' (with a bar chart icon and '0'), and 'View Service requests' (with a briefcase icon and '0'). Below these is the 'Service Request' section, which includes a search bar containing 'NT5120646L' and two tabs: 'Current' and 'Archived'. A table below the search bar shows one service request with the following details:

Date	ID	Customer	Type	Product	Policy Number	Status	View
01/04/2022 15:05:52	5000126659	Gblp Rmfmrbhvh		FLP Death, TPD & Trauma	NT5120646L	In Progress	View

Below the table, there is an 'Export Report' button and a count of '1 to 1 of 1 Service Requests'. A 'Search filter' section is highlighted with a red box, containing:

- 'From' and 'To' date pickers, both set to 'Select'.
- 'Recent days' slider set to '1'.
- 'Status' dropdown menu set to 'In Progress'.
- 'Type' dropdown menu set to 'Select'.

At the bottom of the filter section, there are three buttons: 'Back', 'Clear Filters', and 'Apply' (highlighted with a red box). A 'Chat' button is visible in the bottom right corner.

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]**

The screenshot shows the Resolution Life Adviser view dashboard. At the top, it says "Resolution Life" and "My Resolution Life Welcome YJ Adviser view". Below this is a navigation menu with "I want to:" followed by "Manage", "Find", "Update", "View", and "Request". The "Manage" menu is expanded, and "adviser staff credentials" is highlighted with a red box. To the right, there are sections for "Alerts and Service Request Updates" with cards for "New Alerts", "New Outstandings", "Service request", and "Reports". Below that is a "Customer Search" section with "Customer Name Search", "Life Insured Search", and "Entity Name Search" forms. On the far right, there is a search bar and an "Adviser Resource centre" with a "Click here" button and a "Chat" button.

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.

Resolution Life

My Resolution Life
Welcome YJ
Adviser view

I want to: [Dashboard](#)

Manage [adviser staff credentials](#)

Find

Update

View

Request

Adviser Staff access

[Create New Adviser Staff](#)

Username	Name	Email accounts	Actions
testStaffadviser@amplife.com.au	Staff Adviser	testStaffadviser@amplife.com.au	Deactivate Manage adviser staff details

1 to 1 of 1 items

Deactivated Adviser Staff Accounts

No items to show...

[Back](#)

[Chat](#)

Manage staff credentials (3 of 4)

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

The screenshot displays the 'Resolution Life' interface for managing adviser staff details. On the left, a sidebar contains a 'I want to:' section with a 'Dashboard' link and several menu items: 'Manage' (with an up arrow), 'Find', 'Update', 'View', and 'Request' (all with down arrows). The 'Manage' item is expanded to show 'adviser staff credentials'. The main content area is titled 'Manage Adviser Staff Details' and features an 'Edit' button in the top right corner, which is highlighted with a red box. Below the title bar, there are sections for 'Adviser Portfolio Attached' (with a checked checkbox for 'NFBDU-J'), 'Adviser staff details' (with 'First Name *' set to 'Staff' and 'Last name *' set to 'Adviser'), 'Contact details' (with 'Business Email Address *' as 'testStaffadviser@amplife.com.au' and 'Mobile number' as '0434677874'), and 'Access Details' (with 'Username' as 'testStaffadviser@amplife.com.au' and 'Status' as 'Active'). A 'Back' button is located at the bottom left of the main content area, and a 'Chat' button is in the bottom right corner.

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.

[Back](#)

Resolution Life

adviser staff credentials

Find

Update

View

Request

Adviser Portfolio Attached

NFBDU-J

Adviser staff details

First Name * **Last name ***

Contact details

Business Email Address *

Mobile number

* Authentication purposes only

Access Details

Username **Status** Active

Back Cancel **Save**

Chat

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]**

The screenshot shows the Resolution Life Adviser view dashboard. At the top, it says "My Resolution Life Welcome YJ Adviser view". On the left, there is a "I want to:" menu with options: Manage (with a dropdown arrow), Find, Update, View, and Request. The "Manage" dropdown is open, and "adviser staff credentials" is highlighted with a red box. The main content area has a header "Alerts and Service Request Updates" with four cards: "New Alerts" (0), "New Outstandings" (0), "Service request", and "Reports". Below this is a "Customer Search" section with three search forms: "Customer Name Search" (with First Name and Last Name fields), "Life Insured Search" (with First Name and Last Name fields), and "Entity Name Search". On the right, there is a search bar, an "Adviser Resource centre" with a "Click here" button, and a "Chat" button.

Create new adviser staff (2 of 7)

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

Resolution Life

My Resolution Life
Welcome YJ
Adviser view

I want to: [Dashboard](#)

Manage [^](#)
adviser staff credentials

Find [v](#)

Update [v](#)

View [v](#)

Request [v](#)

Adviser Staff access

Active Adviser Staff Accounts

[Create New Adviser Staff](#)

Username	Name	Email accounts	Actions
testStaffadviser@amplife.com.au	Staff Adviser	testStaffadviser@amplife.com.au	Deactivate Manage adviser staff details

1 to 1 of 1 items

Deactivated Adviser Staff Accounts

No items to show...

[Back](#)

[Chat](#)

Create new adviser staff (3 of 7)

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

Resolution Life

My Resolution Life
Welcome YJ
Adviser view

I want to: [Dashboard](#)

Manage ^
adviser staff credentials

Find v

Update v

View v

Request v

Create New Adviser Staff Account Choose Adviser Portfolio

Create New Adviser Staff

Create New Adviser Staff Account

Create account for a new Adviser Practice staff

Please, write the staff member's email address below

[Back](#) [Next](#)

[Chat](#)

Create new adviser staff (4 of 7)

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

Resolution Life

Update ▼
View ▼
Request ▼

Create New Adviser Staff Account

Create account for a new Adviser Practice staff

Please, write the staff member's email address below

Adviser staff details

First Name * **Last name ***

Contact details

Business Email Address *

Mobile number

* Authentication purposes only

[Top](#) [Chat](#)

Create new adviser staff (5 of 7)

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

The screenshot shows the Resolution Life web interface for creating new adviser staff. At the top, the Resolution Life logo is visible. Below it, a navigation bar includes a dropdown menu labeled 'I want to:' with a 'Dashboard' link. A sidebar on the left contains several menu items: 'Manage' (with an up arrow), 'Find' (with a down arrow), 'Update' (with a down arrow), 'View' (with a down arrow), and 'Request' (with a down arrow). The 'Manage' item is expanded to show 'adviser staff credentials'. The main content area is titled 'Create New Adviser Staff' and features a progress bar at the top with the text 'Choose Adviser Portfolio' and a 'Review and submit' button. Below the progress bar, the 'Adviser Portfolio' section is displayed, showing a list of portfolios. The first item, 'NFBDU-J', has a checked checkbox and is highlighted with a red box. Below the list are two buttons: 'Back' and 'Next'. The 'Next' button is also highlighted with a red box. At the bottom of the page, there is a footer with the Resolution Life logo, a 'Resources' section (including Complaints, Life Insurance code of practice, and Financial hardship), a 'Legal' section (including Privacy Policy, Privacy Collection Statement, Terms of Use and Disclaimer, and Financial Services Guide), and a 'Support' section (including Contact Us, Find a Form, and Tech Support). A copyright notice '@2020 Resolution Life. All rights reserved.' and a 'Chat' button are also present in the footer.

Create new adviser staff (6 of 7)

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

Resolution Life

I want to: [Dashboard](#)

Manage ^
adviser staff credentials

Find v

Update v

View v

Request v

Choose Adviser Portfolio Review and submit

Create New Adviser Staff

Adviser Portfolio Attached

NFBDU-J

Adviser staff details

First Name * Last name *
New Staff

Contact details

Business Email Address *
new_adviser@staffaccount.com

Mobile number
+61123456789

[Back](#) [Submit](#) [Chat](#)

Create new adviser staff (7 of 7)

Confirmation of new staff member will display as per illustration.

The screenshot displays the Resolution Life dashboard interface. On the left, a sidebar menu is visible with the following items: 'I want to:' (with a dropdown arrow), 'Dashboard' (with a left arrow), 'Manage' (with an up arrow), 'adviser staff credentials', 'Find' (with a down arrow), 'Update' (with a down arrow), 'View' (with a down arrow), and 'Request' (with a down arrow). The main content area shows a 'Choose Adviser Portfolio' section with a progress bar and a 'Review and submit' button. Below this is a 'Create New Adviser Staff' section. A white modal window is centered on the screen, titled 'Success' with a close button (X) in the top right corner. The modal contains the following text: 'A new staff member, New Staff, with Username: new_adviser@staffaccount.com has been added as an adviser staff. They can click on Forgot Password link to follow the steps and set their password to login into the Portal'. An 'Ok' button is located at the bottom right of the modal. Below the modal, the 'Business Email Address *' field is populated with 'new_adviser@staffaccount.com' and the 'Mobile number' field is populated with '+61123456789'. A 'Chat' button is visible in the bottom right corner of the dashboard.

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]**

The screenshot shows the Resolution Life Adviser view dashboard. At the top, it says "My Resolution Life Welcome YJ Adviser view". Below this is a navigation menu with "I want to:" followed by "Manage", "Find", "Update", "View", and "Request". The "Manage" menu is expanded, showing "adviser staff credentials" highlighted with a red box. To the right, there are four cards for "New Alerts", "New Outstandings", "Service request", and "Reports". Below these is a "Customer Search" section with three search forms: "Customer Name Search", "Life Insured Search", and "Entity Name Search". On the far right, there is a search bar and an "Adviser Resource centre" with a "Click here" button and a "Chat" button.

Activate / Deactivate staff (2 of 3)

In the **Actions** column:

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

Resolution Life

I want to: [Dashboard](#)

Adviser Staff access [Create New Adviser Staff](#)

Active Adviser Staff Accounts

Username	Name	Email accounts	Actions
testStaffadviser@amplife.com.au	Staff Adviser	testStaffadviser@amplife.com.au	Deactivate Manage adviser staff details

1 to 1 of 1 items

Deactivated Adviser Staff Accounts

Username	Name	Email accounts	Actions
new_adviser@staffaccount.com	New Staff	new_adviser@staffaccount.com	Activate View Staff details

1 to 1 of 1 items

[Back](#)

[Chat](#)

Activate / Deactivate staff (3 of 3)

- Select **[Yes]** to confirm

The screenshot displays the Resolution Life dashboard interface. On the left, a sidebar menu includes options like 'Manage', 'Find', 'Update', 'View', and 'Request'. The main content area is titled 'Adviser Staff access' and shows 'Active Adviser Staff Accounts'. A modal dialog box titled 'Activate staff' is centered on the screen, asking for confirmation to activate an account. The dialog displays the user name 'New Staff' and the user ID '7735bd0c-4dc3-4c9a-90e9-bf5b942eb8de'. At the bottom of the dialog, there are two buttons: 'Yes' (highlighted with a red border) and 'No'. The background dashboard shows a table with one item and a 'Back' button at the bottom.

Click to chat (1 of 3)

From any screen in My Resolution Life:

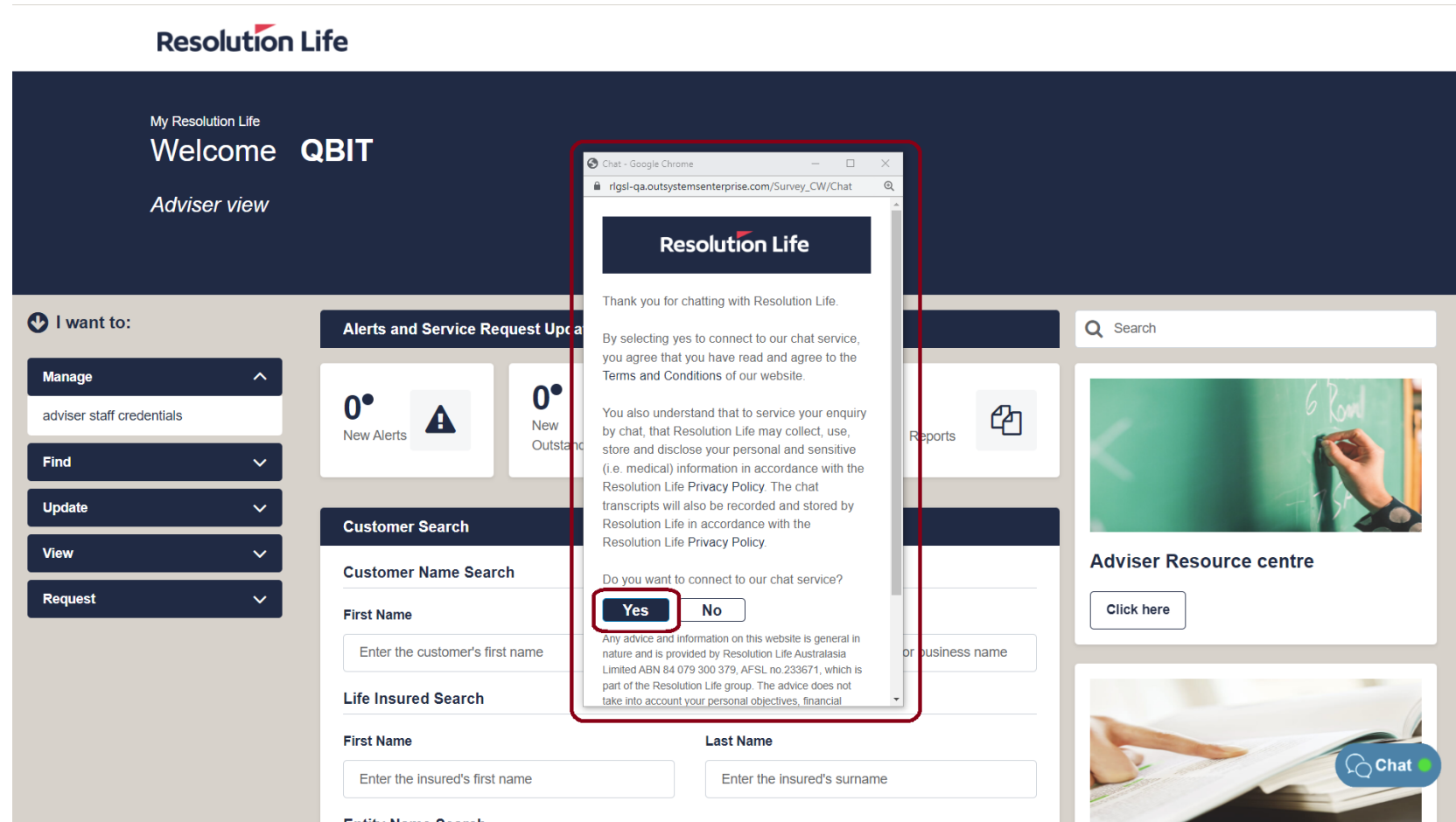
- Select the [**Chat**] button to access **Click to Chat**.

The screenshot shows the Resolution Life 'My Resolution Life' interface in 'Adviser view'. The top navigation bar includes the Resolution Life logo and a user welcome message: 'Welcome QBIT'. Below this, a 'I want to:' dropdown menu is open, showing options: 'Manage' (with a sub-item 'adviser staff credentials'), 'Find', 'Update', 'View', and 'Request'. The main content area is divided into two sections: 'Alerts and Service Request Updates' and 'Customer Search'. The 'Alerts' section displays four cards: 'New Alerts' (0), 'New Outstandings' (0), 'Service request' (0), and 'Reports'. The 'Customer Search' section contains three search forms: 'Customer Name Search' (with 'First Name' and 'Last Name' fields), 'Life Insured Search' (with 'First Name' and 'Last Name' fields), and 'Entity Name Search'. On the right sidebar, there is a search bar, an 'Adviser Resource centre' card with a 'Click here' button, and a 'Chat' button highlighted with a red box. The 'Chat' button is a blue speech bubble icon with the word 'Chat' and a green indicator light.

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.



The screenshot displays the Resolution Life website interface. At the top, the Resolution Life logo is visible. Below it, the user is logged in as 'QBIT' in 'Adviser view'. The main navigation bar includes 'I want to:' with options like 'Manage', 'Find', 'Update', 'View', and 'Request'. The central content area features 'Alerts and Service Request Updates' with 'New Alerts' and 'New Outstanding' indicators, and a 'Customer Search' section with input fields for 'First Name' and 'Last Name'. A chat pop-up window is overlaid on the page, containing the following text:

Resolution Life

Thank you for chatting with Resolution Life.

By selecting yes to connect to our chat service, you agree that you have read and agree to the Terms and Conditions of our website.

You also understand that to service your enquiry by chat, that Resolution Life may collect, use, store and disclose your personal and sensitive (i.e. medical) information in accordance with the Resolution Life Privacy Policy. The chat transcripts will also be recorded and stored by Resolution Life in accordance with the Resolution Life Privacy Policy.

Do you want to connect to our chat service?

Yes No

Any advice and information on this website is general in nature and is provided by Resolution Life Australasia Limited ABN 84 079 300 379, AFSL no 233671, which is part of the Resolution Life group. The advice does not take into account your personal objectives, financial

Click to chat (3 of 3)

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

The screenshot displays the Resolution Life 'Adviser view' dashboard. At the top, the Resolution Life logo is on the left, and 'My Resolution Life Welcome QBIT Adviser view' is on the right. The main content area is divided into several sections: a left-hand navigation menu with options like 'Manage', 'Find', 'Update', 'View', and 'Request'; a central 'Alerts and Service Request Update' section showing '0 New Alerts' and '0 New Outstanding'; and a 'Customer Search' section with input fields for 'Customer Name Search' and 'Life Insured Search'. A 'Resolution Life Chat' window is overlaid in the center, showing a conversation where the virtual assistant says: 'Hello', 'Resolution Life - Virtual Assistant @ 9:14 AM', 'Hi QBIT KBFFZ, I'm a virtual assistant and here to help you. If you need to chat with an agent, I can help you with that.', and 'Ask me a question.' Below the chat messages is a 'Type a message' input field and an 'End chat' button. In the bottom right corner of the dashboard, there is a 'Chat' button with a speech bubble icon.