# My Resolution Life
## How to Guide
# Access Customer View

*A step by step guide to accessing the customer view*

**Resolution Life**

# Access Customer View

**Log in and on the home dashboard:**

## Step 1

- Select **[Customer Search]**
- Search options are:
  - Name
  - Life Insured
  - Entity Name
  - Policy/Contract #

## Step 2

- Identify correct customer record
- Click on the record

# Access Customer View

## Step 3

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

- Select [**arrow buttons**] to scroll through multiple policies held by a customer.

- **Customer view** mirrors what the customer can see when they login My Resolution Life

# Thank you

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