

My Resolution Life

How to Guide

Access Customer

View

A step by step guide to accessing the customer view

Resolution Life

Access Customer View

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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

The screenshot shows the Resolution Life dashboard. At the top, there is a navigation bar with 'Alerts and Service Request Updates'. Below this are four cards: '0° New Alerts', '0° New Outstandings', '11° Service request', and 'Reports'. The 'Customer Search' link is highlighted with a red box and a yellow circle containing the number '1'. Below the navigation bar are four search sections: 'Policy Search', 'Customer Name Search', 'Life Insured Search', and 'Entity Name Search'. Each section has input fields for first name, last name, and date of birth. At the bottom of the search sections are 'Reset' and 'Search' buttons.

The screenshot shows the 'Customer Search' results page. The header is 'Customer Search' and the sub-header is 'Search results for customer'. Below the header is a 'Show 25 results per page' dropdown. The main content is a table with two rows of customer data. At the bottom, there is a 'Back to search' button.

Name :	Policy	Address :	Suburb :	City :	Post Code :	State :	Country :
Sf Dbnl Mtlm	D311117675	6 Zabafam Lf	KILSYTH SOUTH				AUS
Sfh Svznlar Mtlm	D311117675	6 Zabafam Lf	KILSYTH SOUTH				AUS

1 to 2 of 2 items

Back to search

Access Customer View

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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

The screenshot displays the 'Resolution Life Insurance' product details page. At the top, there is a navigation bar with 'Select your product:' on the left, a yellow circle containing the number '3', and a red-bordered box containing left and right arrow buttons. Below this is a dark blue header with 'Product Details' on the left and 'Policy Data As At: 05/10/2022' on the right. The main content area is divided into several sections: 'Member number' (D311117667) and 'Plan started' (19 Apr 1998); 'Plan ends' (19 Apr 2025) and 'Premium indexed with inflation' (Y); a section for 'Icovgp Gfohgiih Hotifmlomgvbi Avsvgiu' (Relationship type: Owner); a section for 'Dbnl Mfilm' (Relationship type: Owner-Life Insured, Insured DOB: 20 Apr 1960); 'Mailing address' (6 Zabkifaim Uf, KILSYTH SOUTH, VIC 3137 Australia) and 'Insurance benefit start date' (19 Apr 1998); and 'Insurance benefit end date' (19 Apr 2025) and 'Policy anniversary' (19 Apr 2023). At the bottom, there are three expandable sections: 'Transaction Details', 'Insurance details', and 'Payments , Premiums and Fees', each with a downward arrow.

Thank you

What you need to know

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