

My Resolution Life

How to Guide

Managing support staff

*A step by step guide to managing
support staff*

Resolution Life

Onboarding new staff

Onboarding new staff

Step 1

- Log in to My Resolution Life
- Haven't used My Resolution Life before? [Learn more here](#)

Step 2

- Once logged in, select **[Manage]** then **[Adviser Staff Credentials]**
- Select **[Invite New Adviser Staff]** in the top corner
- Fill in the required information to send your staff member an invite

The screenshot displays the Resolution Life Adviser Staff access interface. At the top, there is a navigation menu with options like 'Manage', 'Update', 'Request', 'Statements and correspondence', and 'Manage my cover'. The 'Manage' option is selected, and 'Adviser staff credentials' is highlighted. Below this, there are sections for 'Alerts and Service Request Updates' (showing 0 New Alerts, 0 New Outstandings, and 0 Service request) and 'Customer Search' (with a 'Policy Search' field). A 'Click here' button is visible in the top right corner.

The main section is titled 'Adviser Staff access' and contains a table of 'Active Adviser Staff Accounts'. A red box highlights the 'Invite New Adviser Staff' button in the top right corner of this section. The table has columns for Username, Name, Email accounts, and Actions. The actions column includes 'Deactivate' and 'Manage adviser staff details' for each row.

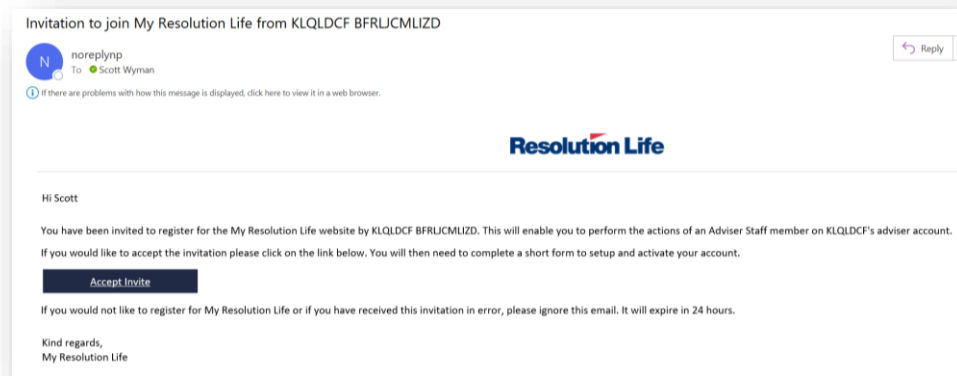
Below the table is the 'Invite Adviser Staff' section, which includes a 'Create New Adviser Staff Account' form. The form has a text area for instructions: 'Please enter the staff member's name and email address below. An invitation will be sent to the email address, allowing the staff member to register for Adviser Portal access, linked to your account.' The form has three input fields: 'First name *' (with 'Scott' entered), 'Last name *' (with 'wyman' entered), and 'Business email address *' (with 'scott.wyman@resolutionlife.com.au' entered). There are 'Back' and 'Next' buttons at the bottom of the form.

Username	Name	Email accounts	Actions
Divya.adviserstaff@gmail.com	Divya AdviserStaff	Divya.adviserstaff@gmail.com	Deactivate Manage adviser staff details
qfqsft776@hopeon.xyz	Inviteadvisor test	qfqsft776@hopeon.xyz	Deactivate Manage adviser staff details
adviserstaff1@gmail.com	Adviser Staff1	adviserstaff1@gmail.com	Deactivate Manage adviser staff details
fjjsbki539@hopeon.xyz	Inviteadvisor new	fjjsbki539@hopeon.xyz	Deactivate Manage adviser staff details
Divya.Samatham@amplife.com.au	Divya Samatham	Divya.Samatham@amplife.com.au	Deactivate Manage adviser staff details

Onboarding new staff

Step 3

- Your staff member will receive an email in their inbox - they will need to click on the link within 24 hours of receiving the email to complete their login
- Your new staff member will then need to enter their details. Their username will be their staff email address.



Register as an Adviser Staff

Your details Log in Security code Complete setup

1 2 3 4

Your Details

Username scott.wyman@resolutionlife.com.au	Email address scott.wyman@resolutionlife.com.au
---	--

First name * Scott	Last name * wyman	Mobile phone * <input type="text"/>
-----------------------	----------------------	--

Password * <input type="password"/>	Password strength: <div style="width: 50%;"><div style="width: 50%;"></div></div> Weak
--	---

Confirm password * <input type="password"/>
--

Privacy policy

By registering for My Resolution Life you agree to our privacy policy.
For more details about privacy and the information we collect, please read our [Privacy Collection Statement](#).

Updating support staff details

Updating support staff details

Step 1

- Once logged in, select **[Manage]** then **[Adviser Staff Credentials]**
- A list of **[Active Adviser Staff Accounts]** and **[Deactivated Adviser Staff Accounts]** will display.

Step 2

- Select **[Manage adviser staff details]** next to the chosen record. Then select **[Edit]** in the top right corner.

Adviser Staff access

Active Adviser Staff Accounts Invite New Adviser Staff

Username	Name	Email accounts	Actions
Divya.adviserstaff@gmail.com	Divya AdviserStaff	Divya.adviserstaff@gmail.com	Deactivate Manage adviser staff details
qfqsft776@hopeon.xyz	Inviteadvisor test	qfqsft776@hopeon.xyz	Deactivate Manage adviser staff details
adviserstaff1@gmail.com	Adviser Staff1	adviserstaff1@gmail.com	Deactivate Manage adviser staff details
fjjsbki539@hopeon.xyz	Inviteadvisor new	fjjsbki539@hopeon.xyz	Deactivate Manage adviser staff details
Divya.Samatham@amplife.com.au	Divya Samatham	Divya.Samatham@amplife.com.au	Deactivate Manage adviser staff details

1 to 5 of 5 items

Deactivated Adviser Staff Accounts

No items to show...

Pending Invitations

Resolution Life Search my Resolution Life New adviser staff Log out Last login: Wednesday, 05/04/2023 11:03 AM

Manage Adviser Staff Details Edit

Adviser Portfolio Attached

Adviser staff details

First Name * Start94 Last name * Smith

Contact details

Business Email Address * staffer94@mail.au

Mobile number +64226437994

Access Details

Username staffer94@mail.au Status **Active**

Back

Chat

Updating support staff details

Step 3

On the next screen, you can edit the following details:

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

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

Note:

By assigning the relevant portfolio to the staff member, each adviser in your practice can give the staff member access to their portfolio. ***By doing this, you can create a whole-practice view for dedicated support staff members.***

The screenshot displays the 'Resolution Life' user interface for updating staff details. The page title is 'Resolution Life' with a search bar and user information. The left sidebar contains navigation options: 'Manage', 'adviser staff credentials', 'Update', 'Request', and 'Documents and forms'. The main content area is titled 'Adviser Portfolio Attached' and includes a checked checkbox. Below this is the 'Adviser staff details' section with input fields for 'First Name' (Bob) and 'Last Name' (Smith). The 'Contact details' section includes 'Business Email Address' (bobsmith@resadviser.com) and 'Mobile number' (+22 643 7198). A note indicates 'Authentication purposes only'. The 'Access Details' section shows the 'Username' (bobsmith@resadviser.com) and a green 'Active' status. At the bottom, there are 'Back', 'Cancel', and 'Save' buttons, with the 'Save' button highlighted by a red border. A 'Chat' button is visible in the bottom right corner.

Activate or deactivate staff access

Activate or deactivate staff access

Step 1

- Once logged in, select [Manage] then [Adviser Staff Credentials]
- In the [Actions] column, you can:
 - Select [Activate] to activate a staff's account or
 - Select [Deactivate] to deactivate a staff's account

Adviser Staff access

Active Adviser Staff Accounts [Invite New Adviser Staff](#)

Username	Name	Email accounts	Actions
Divya.adviserstaff@gmail.com	Divya AdviserStaff	Divya.adviserstaff@gmail.com	<input checked="" type="checkbox"/> Deactivate <input type="checkbox"/> Manage adviser staff details
qfqsstf776@hopeon.xyz	Inviteadviser test	qfqsstf776@hopeon.xyz	<input checked="" type="checkbox"/> Deactivate <input type="checkbox"/> Manage adviser staff details
adviserstaff1@gmail.com	Adviser Staff1	adviserstaff1@gmail.com	<input checked="" type="checkbox"/> Deactivate <input type="checkbox"/> Manage adviser staff details
fjsbki539@hopeon.xyz	Inviteadviser new	fjsbki539@hopeon.xyz	<input checked="" type="checkbox"/> Deactivate <input type="checkbox"/> Manage adviser staff details
Divya.Samatham@amplife.com.au	Divya Samatham	Divya.Samatham@amplife.com.au	<input checked="" type="checkbox"/> Deactivate <input type="checkbox"/> Manage adviser staff details

1 to 5 of 5 items

Deactivated Adviser Staff Accounts

No items to show...

Pending Invitations

Thank you

What you need to know

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Resolution Life