

Agent Dashboard

Advisor in DSF/APC

As an Advisor in DSF/APC Channels or an FLS/FOS in DM/HDFC/TPD channels (roles directly mapped to customers), I should be able to get a snapshot of my business, performance and portfolio when logging in to the portal and should be able to prioritize my tasks for the day



LIFE INSURANCE

Hello Vijayaragavan Ramachari!



Congratulations!

Lorem ipsum is placeholder
text commsadsd

Commission Details



Active NOPs

2500

20% Higher

Persistency

78%

Commission YTD

4,15,000

20% Higher

Total FYP

4,15,000

05% Less

Top action for the day



35

Policies Due for Renewal

Rewards & Recognition

[View All](#)



March Lucky 1000

Status 20%

Mar 01 to Mar 31 2021



Quick Links



Tax Statements



Premium Payment Recei



Dashboard



My Customers



My Self



More

Dashboard



Congratulations!
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Commission Details



Active NOPs
10% 
8,000



Persistency
78%



Commission YTD
10% 
4,15,000



Total FYP
10% 
30,00,000

Top action for the day



35
Policies Due for Renewal



35
Customers have Bdays



55
Policies Maturing




16
Customers have PASA Offers


Performance - Running R&R Contests

[View All](#)




March Lucky 1000
Shortfall **20%**
 Mar 01 to Mar 31 2021



March Lucky 1000
Shortfall **20%**
 Mar 01 to Mar 31 2021



March Lucky 1000
Shortfall
 Mar 01 to Mar 31 2021

Quick Links



Tax Statements



Premium Payment Receipt



Contest Updates



Agent Dashboard

Agent Dashboard - HDFC, TPD, DM

As an RO in HDFC, TPD, DM Channel - Dashboard



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Dashboard



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Congratulations!
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt

Commission Details



Active NOPs
8,000

10% 



Persistency
78%



Active Customers
2000

10% 



Total FYP
30,00,000

10% 

Top action for the day



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Quick Links



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Contest Updates



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