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







Hello Vijayaragavan Ramachari!



Congratulations!

•00

Lorem ipsum is placeholder text commsadsd

Commission Details





Active NOPs

2500

20% Higher ①

Persistency

78%

Commission YTD

4,15,000

20% Higher 🕥

Total FYP

4,15,000

05% Less **↓**

Top action for the day



Policies Due for Renewal

Rewards & Recognition

View All



March Lucky 1000

Status **Contract**

Mar 01 to Mar 31 2021





Premium Payment Recei













Dashboard

My Customers

My Self

Aditya Birla Sun Life Insurance Company Limited

Dashboard



Congratulations!

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Commission Details



Active NOPs 8,000

Persistency **78%**

 \bullet

Commission YTD 4,15,000

10% 🕥

Total FYP

10% 🔱

View All

30,00,000

Top action for the day



Policies Due for Renewal



35

Customers have Bdays



55

Policies Maturing



Customers have PASA Offers

Performance - Running RGR Contests



March Lucky 1000 Shortfall 20%

10% 🕥

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









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Agent Dashboard

Agent Dashboard - HDFC, TPD, DM

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







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•00

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Top action for the day



Policies Due for Renewal

Rewards & Recognition

View All



March Lucky 1000

Status **Contract**



Mar 01 to Mar 31 2021





Premium Payment Recei













Dashboard

My Customers

My Self

Aditya Birla Sun Life Insurance Company Limited

10% 🕥

Dashboard



Congratulations!

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Commission Details



Active NOPs **8,000**

(0/0)

Persistency 78%

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 \bullet

Active Customers **2000**

₹

10% 🕥

Total FYP

10% 🔱

View All

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 RGR Contests



March Lucky 1000
Shortfall 20%



March Lucky 1000

Shortfall 20%

Mar 01 to Mar 31 2021



March Lucky 1000

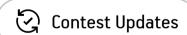
Shortfall —

Mar 01 to Mar 31 2021

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