# Understanding the interface.

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Before jumping in and checking out all Hero has to offer its important to have a good understanding of the interface.

First of all, let's log into Hero using the link and your login details which were included in your welcome email.
The first thing you will see after "logging in" is the Advisor's Dashboard

Start the video with Log-in screen displayed

The Dashboard is the central page for your practice and from here you can manage all the day to day staff and client activities.
Let's start from the Top.
The Top line in dark grey allows you to edit your details, Manage staff assignments and advisers, access Help files and print screens. We strongly recommend that you use the Help Files as they cover everything you need to know about getting the best outcome out of your Hero platform.
Next, you will see that the remainder of the page is broken down to a range of sections, boarded by a thin grey line. To start let's look at the far left where you can;
Manage Clients
Search Clients
Add clients
You can also view the most recent client files and by clicking on the name of the client you will be able to access the clients file.

Further down  that side of the page is the My Apps list. This is a list of current available modules that you can use for your clients. The outcome features of the My Apps section changes to reflect the page you are dealing with.

For example, if you click on the My Apps whilst  in the Dashboard page, you will access online reporting of your practice, for example, clicking on Insurance cover gives you a complete report on who are your underwriters, types of cover, number of polices and allows you to drill down to a group or single client view.
If you are in a clients view, the My Apps relate to the modules you are using solely for that client, so if you are only advising on risk insurance you would only see the risk insurance App and that App will only have information pertaining to that client, unlike the Dashboard view which has the entire practice view.

Next is your Tool Box containing a range of calculators, Super seeker tools, Market Summary reports, Strategy Text creation and Practice Overview.
For Compliance managers and RM of AFSL we have additional tools to help with the management of staff, audits, ARs and compliance measures.

The central part of the page is the command centre, this is a complete dynamic portion of the page, with data changing and where you view your practice in real-time.
On the top are 4 colour coded boxes that are expandable to display active data.
Click on Investment Statistics to view everything from Superfunds to funds held in Investment companies and everything in-between.
Click on the Insurance Statistics providers to view a detailed report on the Adviser insurance portfolio
And by clicking on the Client Statistics this gives you a complete overview of your client's position, Risk profile, pending review and how many files may have compliance concerns via SmartCheck.

Finally, you can view which clients have logged into the system and also the date and time that they accessed their files.

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Next, within the centre section of your Dashboard are up to 12 active 'Hot Button" options for you to use in planning and designing your practice advice position. For example, if you click on the Workflow button you will see ALL the open workflow tasks for your practice by client name and colour coded for ease of identifying.

Let's look at the other buttons listed for you to use.

Dashboard; it gives you a refreshed view of all the actions within your practice

Workflow is your practice process manager completely editable and customisable to suit your office procedures.
You can also manage the template designs of your Workflow here as well.

Reviews is as the name suggest, your pending review manager

Prospects is a pipeline manager
Y
ou will see there is a Research Button, this is your recourse to upload or add external research sites that is central to your practice

Next is Time Tracker, your Fee for Service and Staff time task manager tool, followed by Smartfees, which is your insight practice fee management tool

Model Portfolio manager- this button will give you an alert if your model portfolio for clients require attention

QuickTEXT button is where you can globally edit your strategy text

Favourite is a list of your preferred investments for clients and finally
RoboREFUND is your tool  if you are a Commission Free or Fee refunded practice and it allows you to manage who is getting what and when.

Finally, on the Dashboard central page view are the dynamic changes within your practice management.
When you first view this section you will note that there are 6 task bars, these task bars are collapsible and movable allowing you to arrange this display in the manner that is best suited to your needs.
The three key aspects are;
Workflow Manager- this section outlines which staff member is working on what file and the status and duration of the file.

Workflow by client offers a similar view by highlighting the most recent task and their duration in relation to a client

Practice Actions – this task bar keeps you informed about ALL the actions that relate to All your clients, for example if a client has been sent an SMS, that action would be displayed in the Practice Actions screen.

Then you have 3 client focus task bars
Clients Birthdays – as the name suggest this displays all upcoming birthdays within the next 30 days
Anniversaries- this relates to data captures within the Advance Fact Finder and will display such things as Binding Death Nominations and even wedding anniversaries
Client Activities – this is one of the key task bars for you to view, as it displays any actions that your client may have undertaken by logging into the portal; for example, if they up-dated a new address you will instantly see it, this task bar identifies ALL client actions for your convenience.

Finally, as we said, within this section you can design the layout to suit your needs and to do this simply place your cursor over the main task bar and your cursor will become a 4 point tool, click on your mouse and simply move the bar to where you want it.

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