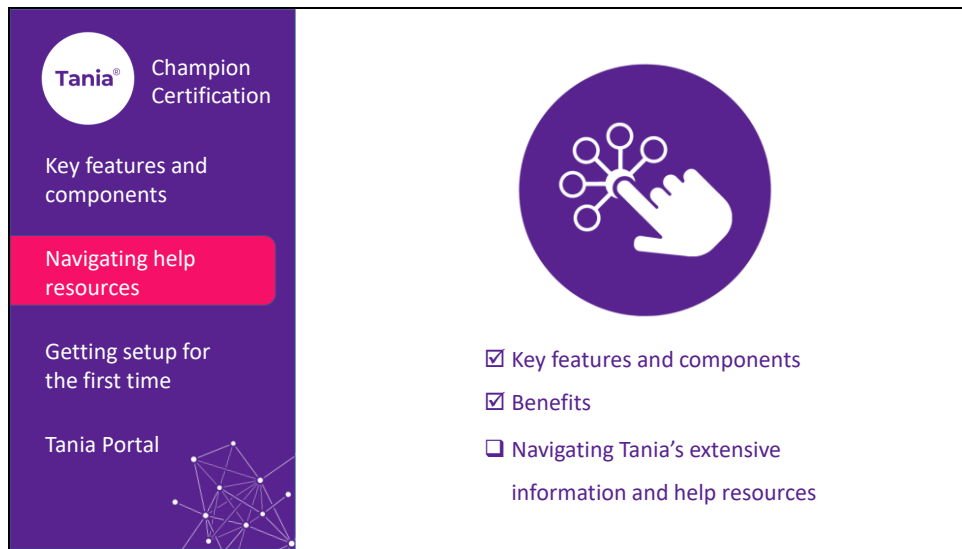


Slide 1



Slide 2



The slide features a dark purple sidebar on the left with the Tania logo and text: 'Tania Champion Certification', 'Key features and components', 'Navigating help resources' (highlighted in a red box), 'Getting setup for the first time', and 'Tania Portal' with a network diagram. The main content area on the right includes a circular icon of a hand pointing to a network diagram and a checklist with three items: 'Key features and components' (checked), 'Benefits' (checked), and 'Navigating Tania's extensive information and help resources' (unchecked).


Tania[®] Champion Certification

Key features and components

Navigating help resources

Getting setup for the first time

Tania Portal



- Key features and components
- Benefits
- Navigating Tania's extensive information and help resources

Welcome! This video is the second in a series to get you setup as a Tania Champion.

Now that you have a general understanding of What Tania is, key features and benefits – let's have a closer look at navigating Tania's extensive information and help resources.

Tania Champion Certification

Key features and components

Navigating help resources

Getting setup for the first time

Tania Portal

Tania website

Central hub and holds a wealth of information

The Tania Chatbot

- Use this tool to ask questions,
- Get instant links to the knowledge base
- Request to speak to someone

The Tania Portal

- Crucial for getting setup with Tania
- Lots of other functions like adding organisations, payment

First, we're going to have a look the Tania website. This website is a central hub for Tania and holds a wealth of information. As a Tania Champion you will often use the website, and help your colleagues and clients navigate it.

You should take the time to familiarise yourself– paying particular attention to the following sections:

- The Tania chat bot – use this tool to ask questions, get instant links to the knowledge base depending on your search terms, or request to speak to someone.
- The Tania Portal - which is a crucial resource for getting setup with Tania, adding new organisations and many other functions. We'll get into more detail around the Tania Portal in a later video.
- The Pricing and Tania subscriptions section – this useful section provides a detailed breakdown of the different Tania subscription packages available. We have 4 main types:
 - Tania Free
 - Tania Starter
 - Tania Business – which is our most popular subscription
 - And finally, the Tania Premium subscription

It will be important to familiarise yourself with each subscription package – as you may need to guide colleagues and clients through the different Tania functionality available in each package.

Slide 4

Tania Champion Certification

Key features and components

Navigating help resources

Getting setup for the first time

Tania Portal

Tania website

Central hub and holds a wealth of information

The Pricing and Tania subscriptions section

- Detailed breakdown of the Tania subscription packages

The Tania Advisor Directory

- Listing of organisations within the Partner Program
- Potential new clients can search

- The Tania Advisor Directory - this directory is a listing of organisations that are part of the Tania Partner Program. Potential new clients can view and search this directory for organisations that use and supply Tania.

Slide 5

The slide features a purple sidebar on the left and a white main content area on the right. The sidebar contains the following text from top to bottom: 'Tania® Champion Certification', 'Key features and components', 'Navigating help resources' (highlighted in a red box), 'Getting setup for the first time', and 'Tania Portal' with a network diagram icon. The main content area has a purple circular icon with a globe and network symbols, followed by the text 'Tania website' and 'Central hub and holds a wealth of information'. Below this is a large purple circular icon containing a white document and database symbol.

Resources - another important feature of the website is the Resources section. This links to the Tania Knowledge base.

Slide 6



The Tania Knowledge base will be a key resource for you as a Tania Champion.

You can think of the Knowledge base as an information library for all things Tania – with step by step guides and video tutorials. We are constantly updating it, and always welcome your feedback to refine this learning resource.

You can browse the categories we've put together, or alternatively use the search function at the top to quickly find an answer to your question.

Articles within the Knowledge base can be shared easily. Simply copy the URL and paste this into an email.

Tania Champion Certification

Key features and components

Navigating help resources

Getting setup for the first time

Tania Portal

Tania

Support Team

- Contact us
- Committed
- All in this together

And last, but not least – you have the Tania support team at your beck and call. Contact us directly if you'd like to talk to someone. We are committed to supporting you along the way, always remember that together we're helping businesses love their financial story.

Tania Champion Certification

Key features and components

Navigating help resources

Getting setup for the first time

Tania Portal

Our next topic:

Tania's security features and how to setup for the first time

You know about what Tania is, key features and benefits – and now you're up to speed on the main ways to get help and information. Next, we're going to have a closer look at setting Tania up.

Together we're helping businesses
love their financial story