Slide 1

Slide 2

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

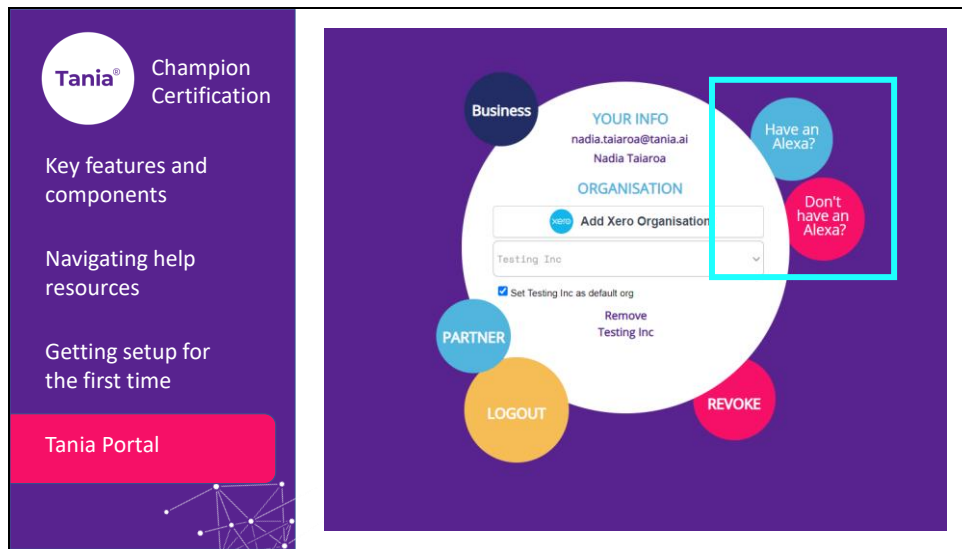Now that you have a general understanding of What Tania is, key features and benefits, navigating Tania's information and help resources, how to setup Tania for the first time – we're going to have a closer look at the Tania Portal.

Slide 3
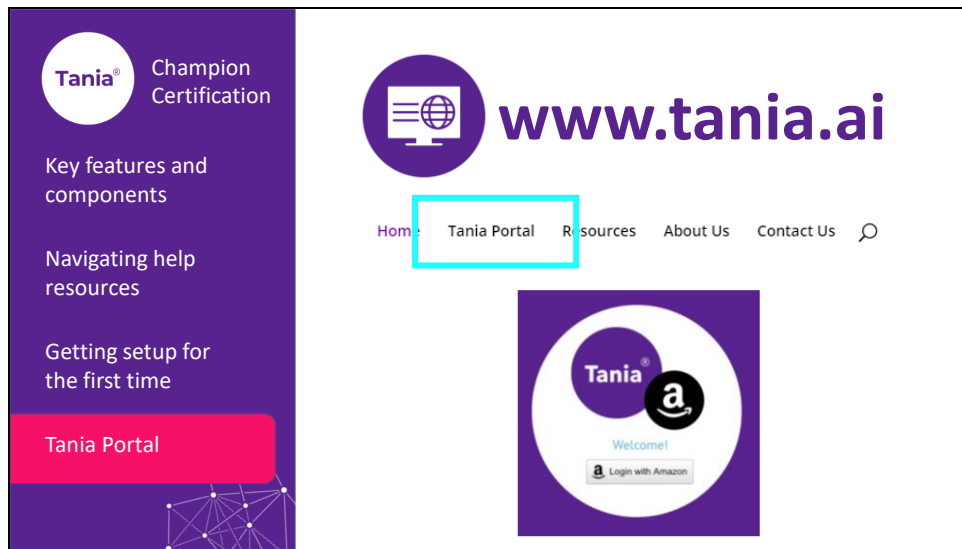
Easily accessed from the website, there are several functions that the Tania Portal provides.

Slide 4

Once you have logged in with your Amazon account, you should see the following display within the Tania Portal. Onboarding is a key function of the Tania Portal. If you are setting up for the first time or taking a client through onboarding you should refer to the bubbles asking if you have an Alexa.

We've talked about this in the previous video. Clicking on either of these bubbles will automatically take you to the Tania Knowledge base with tutorials on how to onboard with Tania depending on your situation.

Slide 5
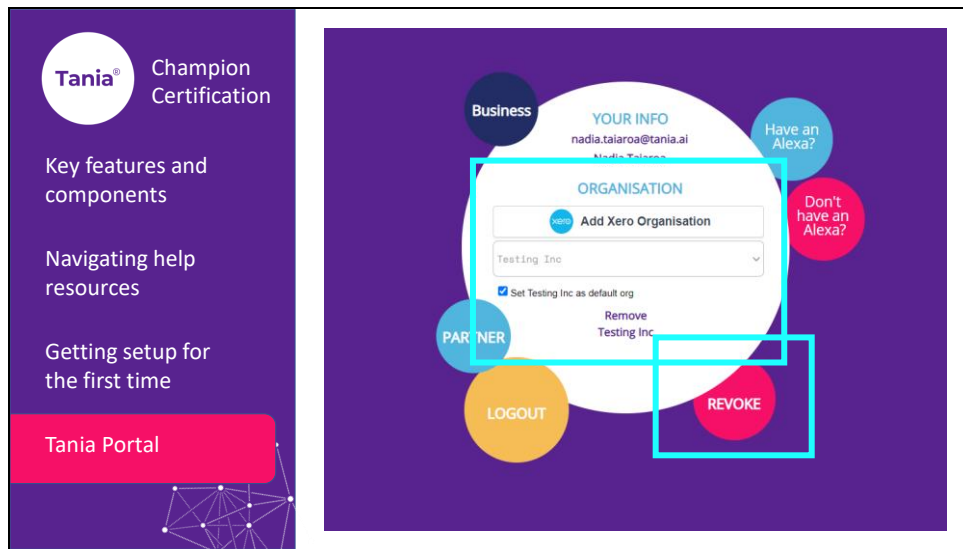
Through the onboarding process you'll connect to your Xero account. This information will be displayed in the centre bubble. You can click on the drop-down list to choose an organisation, as well a use the checkbox to select which organisation you would like to be your default.

If you decide you need to change your Xero login details, click on the revoke button to remove your Xero account details.

Slide 6
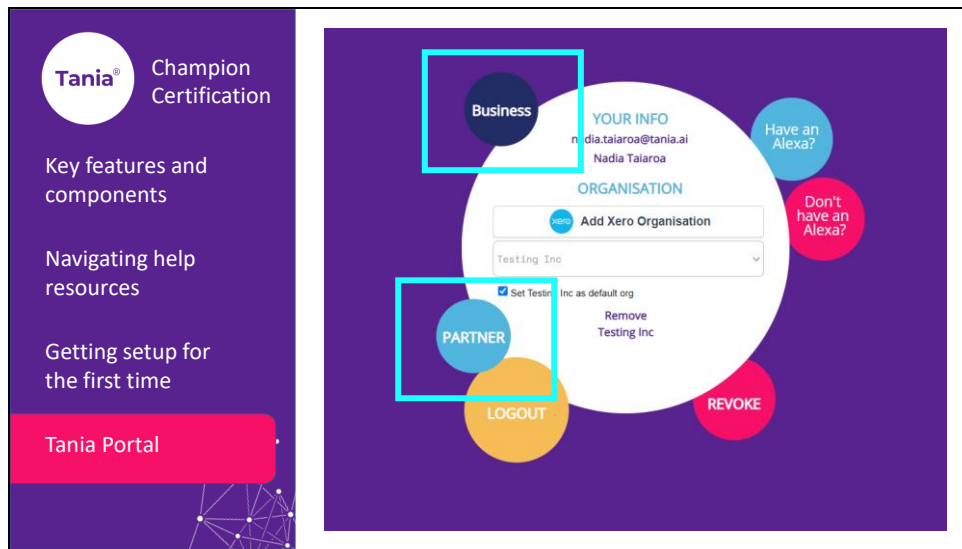
The Subscription bubble will let you know what Tania package you have access to, and therefore what Tania features will be available to you. More detail about each subscription package is available from the pricing page on the Tania website.

The Partner bubble will link to the Tania Partner Portal. This bubble is normally hidden and will only be visible for our Tania Partners. Click here to be automatically taken into the Partner Portal.

Slide 7
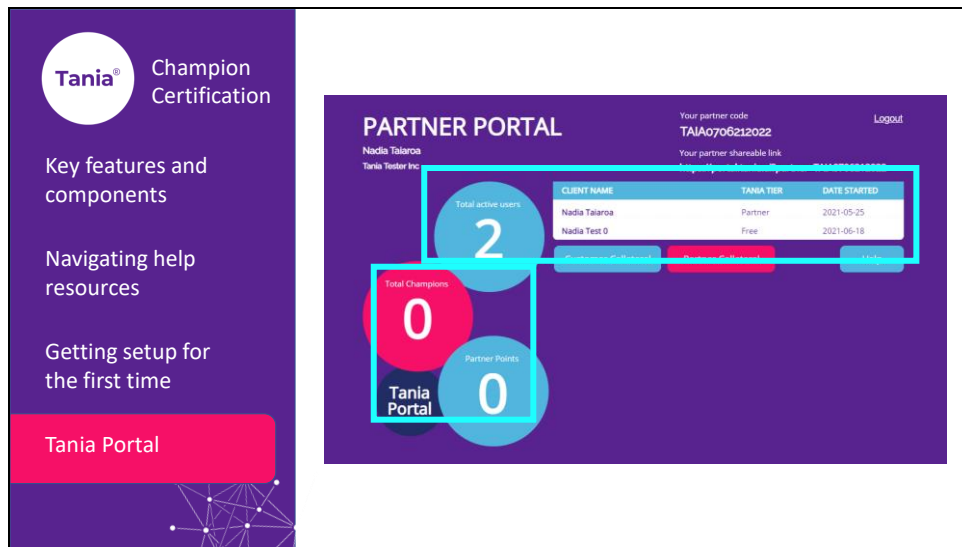
The Partner Portal is a very useful dashboard that displays a variety of information like your unique Tania partner code.

You'll see a snapshot of how many active users are connected to your account. The table will display your clients' names, the Tania tier or subscription package they are on, along with their start date.

Details of your Tania Champions will be displayed, along with your accumulating tally of partner loyalty points.
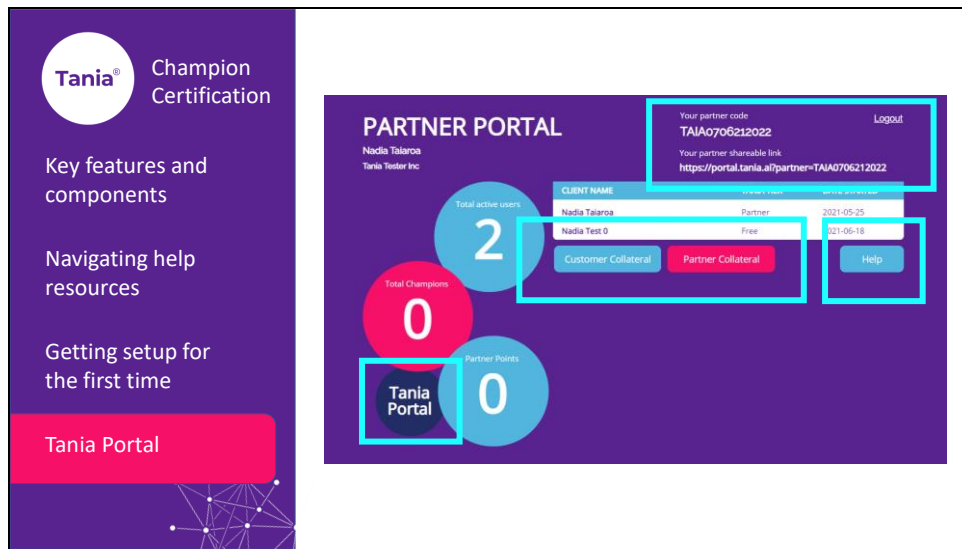
The Partner shareable link is the how you can easily bring your clients onboard with Tania. Copy and paste this link into an email. When your client clicks on this shareable link, they will automatically start the Tania onboarding process and become linked to your Partner account.

We've referenced our very useful collateral pages – with a large selection of ready to use collateral that you can print or share to help explain Tania to your clients and bring them onboard easily.

If you have any issues, click on the Help button to request further assistance.

Finally, there is a Tania Portal button which conveniently takes you back to the Tania Portal.

Slide 9
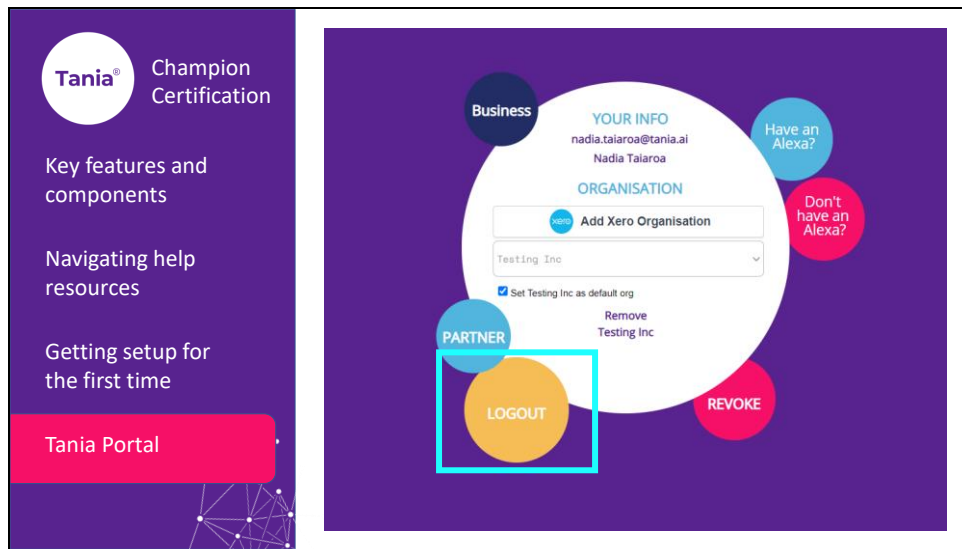
Back in the Tania Portal we have the Logout button to totally log you out of the Tania Portal. This may be useful in instances where you are working from a shared or public computer.

Slide 10

Well done! You've covered all the videos in the Tania Champion Certification series. We have a short quiz to cover the new knowledge that you've picked up – complete this and we'll be in contact to confirm your Tania Champion status.

Like always – if you have any queries please feel free to contact the Tania team for assistance.

Slide 11

Together we're helping businesses
love their financial story