Adviser Guide

Getting Started with Engage

Get familiar

- Download the Engage App on your phone
- Login with the dummy details provide to get familiar with the features
- Login to the Adviser portal with details provided to explore the features

Give it a try

- Try upload a PDF document to the dummy scheme to the portal and see it appear on your App.
- Send a test push notification to the dummy scheme and see it come through on your phone
- Set up your own dummy scheme on the Portal and then on your App register a new user using a fictitious email and the Company Code you have assigned to this scheme

Formatting

- Review the To Do List questions in your Portal. These questions can be changed to suit your personal preference. They will appear on the App for all schemes under To Do List.
- There is a default list of calculators and videos assigned to each insurer. These can be added to/deleted in your portal under Format App

Client roll-out - Document check-list

- Adviser branded HR/ employee video (available in client branding if required)
- HR FAQ
- Employee FAQ
- Employee access details
- Employee Terms of use

When planning your first scheme roll-out please contact us and we will provide you with full assistance in every aspect of the roll-out from formatting the portal, preparing documents and join employer/employee presentations if required

51 Bracken Road, Sandyford Business Park, Dublin, D18 CV48
www.centric.ie