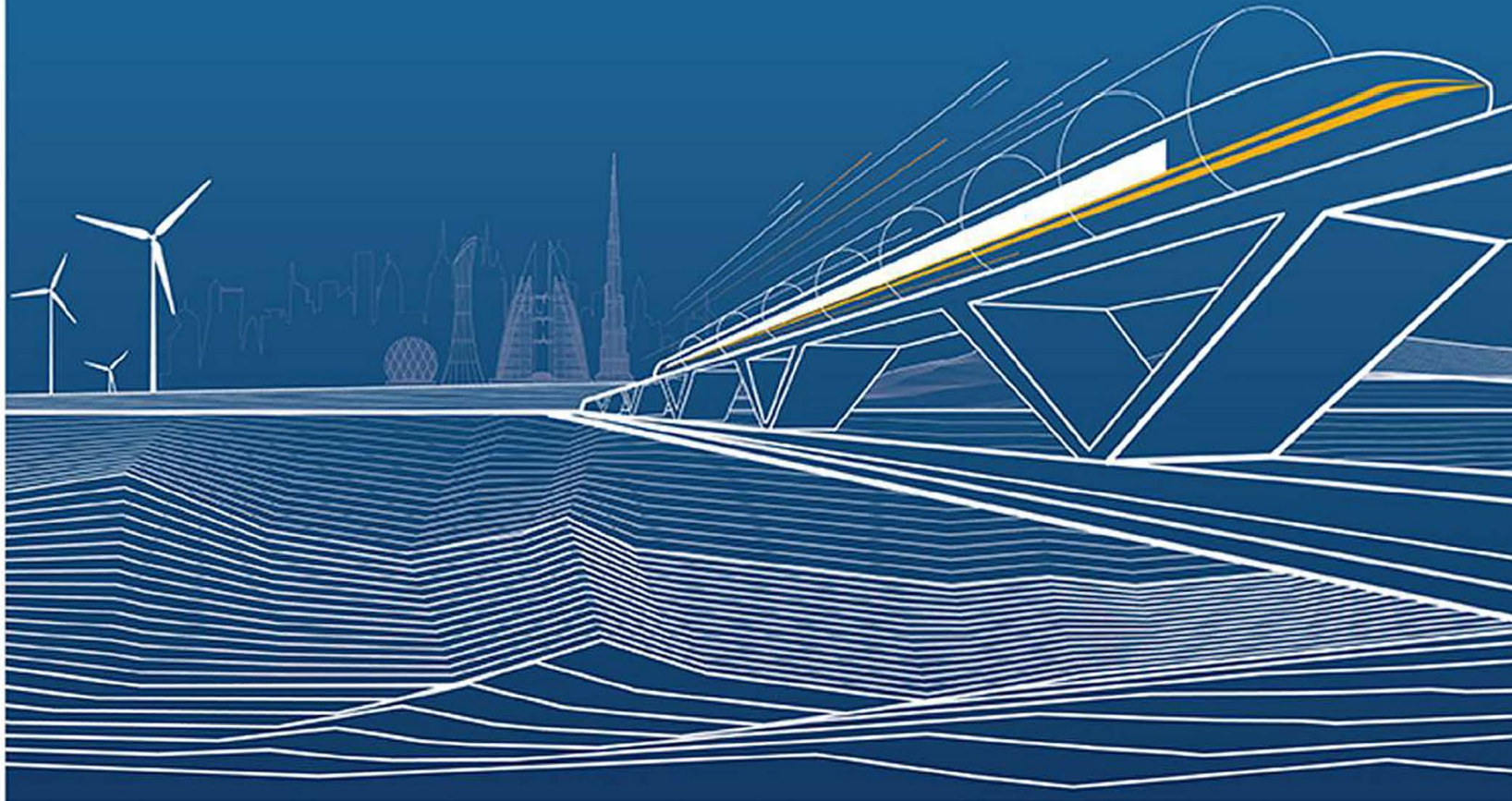


**ZURICH**PRO  
Get on board



E-Service  
Centre  
**User  
Guide**



# Contents

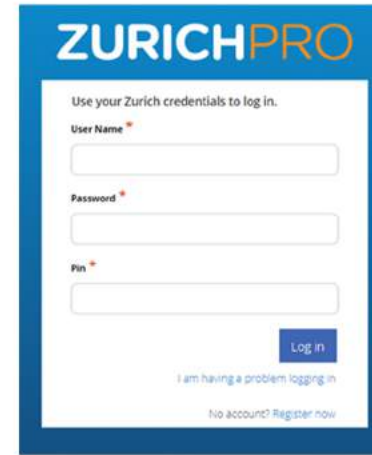
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# Login Page

Open the Distributor Portal URL in the browser and use Zurich credentials to log in.

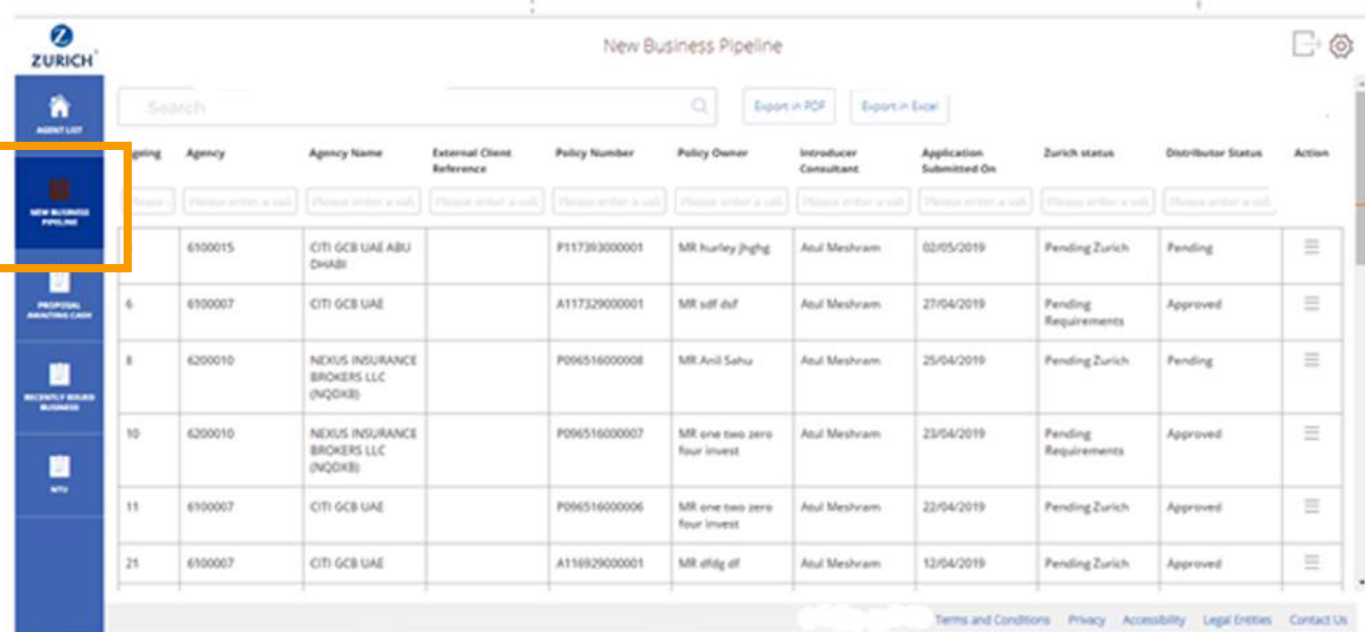
Once your credentials are validated and you are successfully logged in, you will be landed on “New Business Pipeline” screen.



The login form is titled "ZURICHPRO" and contains the following fields and elements:

- Header: ZURICHPRO
- Instruction: Use your Zurich credentials to log in.
- User Name:
- Password:
- Pin:
- Log in button
- Link: I am having a problem logging in
- Link: No account? Register now

Use side menu bar in the left to navigate to different screens, i.e. Agent List, New Business Pipeline, Proposal Awaiting Cash, Recently Issued Business and NTU Policies. The selected screen will turn darker on the side menu, e.g. New Business Pipeline menu in the screenshot above.



The screenshot shows the "New Business Pipeline" dashboard. It features a search bar, "Export in PDF" and "Export in Excel" buttons, and a table of business pipeline items. The "NEW BUSINESS PIPELINE" menu item in the left sidebar is highlighted with a darker blue background and an orange box.

Sl. No.	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
1	Please enter a val	Please enter a val	Please enter a val	Please enter a val	Please enter a val	Please enter a val	Please enter a val	Please enter a val	Please enter a val	
5	6100015	CITI GCB UAE ABU DHABI		P117393000001	MR hurley j/hgh	Azul Meshram	02/05/2019	Pending Zurich	Pending	
6	6100007	CITI GCB UAE		A117329000001	MR siff d/f	Azul Meshram	27/04/2019	Pending Requirements	Approved	
8	6200010	NEXUS INSURANCE BROKERS LLC (NQOKB)		P066516000008	MR Anil Sahu	Azul Meshram	25/04/2019	Pending Zurich	Pending	
10	6200010	NEXUS INSURANCE BROKERS LLC (NQOKB)		P066516000007	MR one two zero four invest	Azul Meshram	23/04/2019	Pending Requirements	Approved	
11	6100007	CITI GCB UAE		P066516000006	MR one two zero four invest	Azul Meshram	22/04/2019	Pending Zurich	Approved	
25	6100007	CITI GCB UAE		A116929000001	MR ofdg of	Azul Meshram	12/04/2019	Pending Zurich	Approved	

# Screen

To see policies in New Business Pipeline, i.e. Pending with Zurich or Pending for Requirements, under an agency, click on that Agency in Agency list screen.

The screenshot shows the 'New Business Pipeline' interface. At the top, there is a 'Global Smart Search' bar (1) and the page title 'New Business Pipeline' (2). On the right, there are 'Additional Options' (3) and a 'Log out' button (4). A table lists various policies with columns for Agency, Agency Name, External Client Reference, Policy Number, Policy Owner, Introducer Consultant, Application Submitted On, Zurich status, and Distributor Status. The 'Agency' column is highlighted with an orange box (5). At the bottom, there are 'Links' (6) for Terms and Conditions, Privacy, Accessibility, Legal Entities, and Contact Us. A 'Side Menu Bar' is visible on the left.

Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
6100015	CITI GCB UAE ABU DHABI		P117393000001	MR hurley jghg	Atul Meshram	02/05/2019	Pending Zurich	Pending	
6100007	CITI GCB UAE		A117329000001	MR vifg duf	Atul Meshram	27/04/2019	Pending Requirements	Approved	
6200010	NEXUS INSURANCE BROKERS LLC (NQOKB)		P096516000006	MR Anil Sahu	Atul Meshram	25/04/2019	Pending Zurich	Pending	
6200010	NEXUS INSURANCE BROKERS LLC (NQOKB)		P096516000007	MR one two zero four invest	Atul Meshram	23/04/2019	Pending Requirements	Approved	
6100007	CITI GCB UAE		P096516000006	MR one two zero four invest	Atul Meshram	22/04/2019	Pending Zurich	Approved	
6100007	CITI GCB UAE		A116929000001	MR ofhg of	Atul Meshram	12/04/2019	Pending Zurich	Approved	

All the details on all the screens, except for Agency List, are read-only.

# Screen

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- 1. Global Smart Search:** To search/filter anything from the selected screen, enter required search data in Global Smart Search window.
- 2. Screen Title:** To see policies in New Business Pipeline, i.e. Pending with Zurich or Pending for Requirements, under an agency, click on that Agency in Agency list screen.
- 3. Additional Options:** 'Additional Options' can be accessed by clicking at the button at the top right corner. Internal User admin can upload exe file from here while external user can download the exe file.
- 4. Log Out:** 'Log out' button is at the top right corner of each screen.
- 5. Individual Smart Search:** To search/filter a specific column on the selected screen, enter the required search data in Individual Smart Search window.
- 6. Links:** One can view Terms and Conditions, Privacy, Accessibility, Legal Entities and Contact Us pages from the links at the bottom of each page.

# Action Menu

## 3.1 Complete

For an external user to approve the issuance of a policy, go to Action menu and click 'Complete' option.

New Business Pipeline

Search

Ageing	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Complete"/>
1	6100015	OTI GCB UAE ABU DHABI		P117393000001	MR hurley jhghg	Atul Meshram	02/05/2019	Pending Zurich		
6	6100007	OTI GCB UAE		A117329000001	MR sdf dsf	Atul Meshram	27/04/2019	Pending Requirements	Approved	<input type="button" value="Complete"/>

A popup message will open. Click 'Confirm to proceed' button to approve the policy for issuance and to trigger an email to Zurich to notify about the same. Click 'Cancel' to close the popup message and return to the main screen.

**Are you happy for Zurich to proceed with this application?**

Note:

- \* Zurich International Life reserves the right to decline applications that do not adhere to our regulation and/or business standards.
- \* Zurich will contact you for further clarification about the application if needed.

Once the Policy is approved by the Distributor (external user), complete option will be removed from Action menu.

# Action Menu

## 3.2 View Requirements

For an external as well as internal user to view the pending requirements, go to Action menu and click 'View Requirements' option.

New Business Pipeline

↗ ⚙

Search

Aging	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
<input type="button" value="Please"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>	<input type="button" value="Please enter a val"/>
1	6100015	CITI GCB UAE ABU DHABI		P11739000001	MR hurley jhgfg	Atul Meshram	02/05/2019	Pending Zurich	Pending	<input type="button" value="Send Email"/> <input type="button" value="View Requirements"/> <input type="button" value="Download Outputs"/>
6	6100007	CITI GCB UAE		A117329000001	MR sdf dsf	Atul Meshram	27/04/2019	Pending Requirements		
8	6200010	NEXUS INSURANCE BROKERS LLC (NQOXB)		P096516000008	MR Anil Saha	Atul Meshram	25/04/2019	Pending Zurich		

A popup window will open as below. Click 'Done' button to close the window and return to the main screen.

**Requirements**

Policy Number : A096609000002

Reason Description	Comments
Proof of Identity	Please provide certified Clear copies of passport for both the policy owners as the one provided is not legible.
Other	Based on the recent medical reports, case is postponed for 6 months for further investigations and treatments. Postpone

# Action Menu

## 3.3 Send Email

For an external user to respond to the pending requirements through email, go to Action menu and click 'Send Email' option.

New Business Pipeline

Search  [Export in PDF](#) [Export in Excel](#)

Ageing	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
30	6100007	CITI GCB UAE		A096609000001	MR tester with report	StandardAgent std	03/04/2019	Pending Zurich	Pending	<a href="#">Complete</a>
30	6100007	CITI GCB UAE		A096609000002	MR tester without report	StandardAgent std	03/04/2019	Pending Requirements		<a href="#">Send Email</a>
31	6100007	CITI GCB UAE		A096551000004	MR tester tester	StandardAgent std	02/04/2019	Pending Requirements		<a href="#">View Requirements</a>

[Download Outputs](#)

A 'New Email' window of the default mail application will open with predefined subject and addressee. Attach required files and write in the email body and click 'Send' to send the email. This will close the 'New Email' window and will return to the main screen.



# Action Menu

## 3.4 Download Outputs

For external as well as internal user to download outputs and documents uploaded along with the application, go to Action menu and click 'Download Outputs' option.

New Business Pipeline 🔍 ⚙️

Search Export in PDF Export in Excel

Ageing	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
30	6100007	CITI GCB UAE		A096609000001	MR tester with report	StandardAgent std	03/04/2019	Pending Zurich	Pending	☰
30	6100007	CITI GCB UAE		A096609000002	MR tester without report	StandardAgent std	03/04/2019	Pending Requirements	<a href="#">Complete</a> <a href="#">Send Email</a> <a href="#">View Requirements</a>	
31	6100007	CITI GCB UAE		A096551000004	MR tester tester	StandardAgent std	02/04/2019	Pending Requirements		<a href="#">Download Outputs</a>

A popup window will open showing the list of documents that can be downloaded.

Click on the desired document name and the document will be downloaded in the browser window.

'H&L Questions' output will not be available for download to the internal users.

For 'KYC Documents' and 'Other Documents', a zip file will be downloaded as there can be more than one document.

To download all the available documents at once, click 'Download All' button, a zip file will be downloaded in the browser. Click 'Done' to close the window and return to the main screen.

### Choose the document to download

Policy Number : A096609000002

- [Quote PDF](#)
- [Application PDF](#)
- [H&L Questions](#)
- [KYC Document](#)
- [Other Documents](#)

[Download All](#)

[Done](#)

# Action Menu

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## 3.5 Action Menu Options

Following are the options available in Action menu based on the user.

### External user

New Business Pipeline	Proposals Awaiting Cash	Recently Issued Policies	NTU
<a href="#">Download Outputs</a> <a href="#">View Requirements</a> <a href="#">Send Email</a> <a href="#">Complete</a>	<a href="#">Download Outputs</a> <a href="#">Complete</a>	<a href="#">Download Outputs</a>	<a href="#">Download Outputs</a>

### Internal user

New Business Pipeline	Proposals Awaiting Cash	Recently Issued Policies	NTU
<a href="#">Download Outputs</a> <a href="#">View Requirements</a>	<a href="#">Download Outputs</a>	<a href="#">Download Outputs</a>	<a href="#">Download Outputs</a>

# Export

To export data present on any screen, click 'Export to PDF' or 'Export to Excel' button at the top of each screen depending on which format one wants the report.

To get the filtered data in the report, filter the data on the screen first using Global Search or Individual Search options and then click 'Export to PDF' or 'Export to Excel'.

The screenshot displays the 'New Business Pipeline' interface. At the top, there is a search bar and two buttons: 'Export in PDF' and 'Export in Excel', both highlighted with orange boxes. Below the search bar is a table with the following columns: Ageing, Agency, Agency Name, External Client Reference, Policy Number, Policy Owner, Introducer Consultant, Application Submitted On, Zurich status, Distributor Status, and Action. The table contains three rows of data. The first row has Ageing '30', Agency '6100007', Agency Name 'CITI GCB UAE', Policy Number 'A096609000001', Policy Owner 'MR tester with report', Introducer Consultant 'StandardAgent std', Application Submitted On '03/04/2019', Zurich status 'Pending Zurich', and Distributor Status 'Pending'. The second row has Ageing '30', Agency '6100007', Agency Name 'CITI GCB UAE', Policy Number 'A096609000002', Policy Owner 'MR tester without report', Introducer Consultant 'StandardAgent std', Application Submitted On '03/04/2019', Zurich status 'Pending Requirements', and Distributor Status 'Pending'. The third row has Ageing '31', Agency '6100007', Agency Name 'CITI GCB UAE', Policy Number 'A096551000004', Policy Owner 'MR tester tester', Introducer Consultant 'StandardAgent std', Application Submitted On '02/04/2019', Zurich status 'Pending Requirements', and Distributor Status 'Approved'. A vertical sidebar on the left contains navigation options: AGENT LIST, NEW BUSINESS PIPELINE, PROPOSAL ANALYTICS CASE, RECENTLY RAISED BUSINESS, and MY. The 'NEW BUSINESS PIPELINE' option is highlighted with an orange box.

Ageing	Agency	Agency Name	External Client Reference	Policy Number	Policy Owner	Introducer Consultant	Application Submitted On	Zurich status	Distributor Status	Action
30	6100007	CITI GCB UAE		A096609000001	MR tester with report	StandardAgent std	03/04/2019	Pending Zurich	Pending	
30	6100007	CITI GCB UAE		A096609000002	MR tester without report	StandardAgent std	03/04/2019	Pending Requirements	Pending	
31	6100007	CITI GCB UAE		A096551000004	MR tester tester	StandardAgent std	02/04/2019	Pending Requirements	Approved	

# For Support and Service

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Contact Helppoint



[Click Here](#)

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**Registered in the Isle of Man number 20126C.**

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