

ZURICHPRO
Get on board



Frequently Asked Questions

for
Admin users

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Getting ZurichPro

> **What is ZurichPro?**

ZurichPro is a digital quote, application and underwriting solution designed to enhance your face to face sales process.

> **What is the E-Service Centre?**

The E-Service Centre is the administrative part of ZurichPro. As an admin user, you will use the E-Service Centre to manage the new business pipeline and submit requirements instantly on the platform. You will be able to access the E-Service Centre using your ZIO (Zurich International Online) credentials. You will have the authority to accept or decline applications based on your company's internal guidelines.

> **How do I download ZurichPro?**

ZurichPro is available on the App store and Google Playstore for your iPad or tablet. For desktop users, you can help financial professionals download ZurichPro from the E-Service Centre. Click [here](#) to download ZurichPro.

Getting ZurichPro

> How do I access the E-Service Centre?

Click [here](#) to go to the E-Service Centre. You will be able to log in with your ZIO (Zurich International Online) username and password. In case you need help, please get in touch with your Zurich HelpPoint team [here](#).

> What are the technical requirements for installing ZurichPro?

These are the technical requirements to install ZurichPro:

Tablet and laptop

- IOS version 10+. Devices: iPad Air, iPad Air 2, and iPad Pro. Minimum 8 GB devices.
- Android version 6+. Devices: Minimum 8 GB devices with at least 2 GB RAM.
- Laptop: Windows 10 operating system (excludes hybrid/touchscreen laptops) with minimum 3 GB RAM and 320 GB hard disk.

For desktop users: you can help you download ZurichPro from E-Service Centre.

Browser compatibility

- Internet Explorer 11+.
- Latest versions of Google Chrome, Safari or Firefox.

Getting ZurichPro

> Is there any other requirement?

You should have version 1.8 of Java for ZurichPro.

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Getting ZurichPro

> **Will ZurichPro work offline?**

No connectivity, no problem! You will be able to work on ZurichPro without any internet connection. Click on the “Save” button. Then when you connect to the internet, click on the “Sync now” button. This will update the data.

> **Will E-Service Centre work offline?**

No, since this is a website, you need to be online to work on this.

> **What about data security on ZurichPro?**

Client data will not be stored on the tablet. It will reside in the ZurichPro application and can be accessed only by logging in. This includes signatures, documents and completed applications.

> **Who can assist me if I need help?**

Your [Zurich HelpPoint team](#) can assist you with any queries.

Getting ZurichPro

> **How often do I need to update the ZurichPro app?**

We will work to ensure that the ZurichPro experience continues to be enhanced - in conjunction with you.
For Windows users - you will receive an email notification on the software updates. Your IT team can help with this.
For iOS and Android users - the system will prompt you when there is an update available.
Don't worry! We will not update the app every other week.

> **How long can I use the current quote system?**

In order to facilitate a smooth transition between these tools, we will continue to operate the existing quote system until you are familiar and comfortable with the new system.

Product

> **What products are available on ZurichPro?**

You can create quotes for all Zurich products on ZurichPro. Additionally you can complete the digital application for ITA with immediate decision capability from the same date. For other products, the application process remains unchanged.

> **How do I change a product quote?**

To change a product at the Quote stage, simply go back to the “product selection” menu.

> **Are there any changes to the illustrations?**

To meet regulatory requirements, we have made two changes to the illustrations:

1. The output is now bilingual (English and Arabic).
2. Quotes will also show a 0% growth rate in addition to the selected growth rate.

> **At what point will the Temporary Life Cover start?**

The Temporary Life Cover will start when the application is submitted from ZurichPro along with a valid method of payment form. Please refer to the Terms and Conditions of the product for details.

ZIO pipeline

> **Do I need to use ZIO (Zurich International Online) and the E-Service Centre for the pipeline?**

All your cases will be available on ZIO (Zurich International Online) pipeline.

For ITA applications exclusively submitted through ZurichPro, you need to work through the E-Service Centre for issuance.

Document submission

> **Is there a limitation in the image size?**

Given the need to have high resolution images, the file size limit per attachment is 5 MB.

> **Someone from my financial professional team has missed a document, how do I upload it?**

This is simple. You can submit the missed document through the E-Service Centre - email the documents to zurichpro@zurich.com

> **Someone from my financial professional team has received documents to upload. How can I help?**

Similarly, you can submit the required document/s through the E-Service Centre.

> **Can I upload a scanned copy of a photo ID from client?**

Yes, you can. Please ensure you confirm that you have seen the original by clicking the disclaimer when uploading documents.

> **What documents can I download from ZurichPro?**

All quotes and documents submitted along with the e-application can be downloaded in two ways:

1. Your financial professional team will receive an email with all the documents.
2. You can download the documents submitted with the application.

Document submission

> **How can I print a quote?**

Two options are available:

1. After you have finalized a quote, click on the "Download PDF" option. Save the PDF to print the quote.
2. Print the quote from your dashboard. Under "Action", click on "Summary" and download the PDF to print.

> **There is no "Other" option in job title when "Banking/Finance/Insurance" is selected. What do I do?**

If it is a banking industry, please select "Bank Staff" or for any other industry select the closest possible job title. (There is no "Not listed above" option available under "Banking/Finance/Insurance" domain.)

> **Can I select additional benefits using ZurichPro or is it life cover only?**

Absolutely. You can select the rider benefits and cover amounts on ZurichPro in line with the available benefits on each product.

Quote guidance

> **How can I get my rated quotes?**

The rated quotes will be available on ZIO (Zurich International Online). You will receive the decision depending on the case and requirements.

> **I do not see the rider benefits on the Quote. How can I find them?**

Please click on “Add benefit” and the drop down menu with rider benefit will appear.

> **I have submitted an application for my client. Now s/he wants to buy another product from Zurich. Do I have to submit all the details again?**

With ZurichPro, this is much simpler!

The app has a clone feature in the quote functionality:

1. Go to “Action” at the right top corner of the screen.
2. Create an editable copy of an accepted quote by clicking “copy”.

You can also clone an existing quote.

> **How long will a quote be on ZurichPro?**

Quotes will be available for 90 days.

Quote guidance

- > **Can I upload more than four primary and four contingent beneficiaries on the application without an additional form (like the current paper application)? If yes, how can I do that?**

ZurichPro allows you to upload as many beneficiaries as you require as long as the allocation equals 100%.

- > **Can applications for increasing premium and additional contributions on existing policies be input through ZurichPro?**

For such cases, please complete the process using paper based applications.

- > **Can I attach supporting documents in ZurichPro?**

Absolutely. As part of the application submission, a valid proof of ID for policy owner(s) and third party payer are required. Any supporting documentation that you wish to provide can be attached under the 'Other documents' field in the ZurichPro application form. Each file size should be 5 MB or lower.

Application guidance

> **How can I search for a previous quotation/application?**

Just click 'View all quotes' or 'View all applications' on your dashboard. You will be able to search for records using any information displayed in the table. Quotes are available for 90 days.

> **What changes can be made to a policy once it has been submitted?**

For these cases, our existing process remains unchanged.

> **What if I need to amend the application after the client has signed the form?**

Click on "Correction" option on the application post which the client will have to resign the application.

> **How can I make changes to a policy after it is issued?**

Your [Zurich HelpPoint team](#) remains at your disposal for any changes required.

Special offers

> **Will the system update the new special offers if I have not been online?**

The special offers will only be updated once you are online. This is done automatically when you go online. If you remain offline for three consecutive days, you will not be able to log in without an internet connection. This is to ensure that ZurichPro is synced with our latest offers.

> **How can I apply a special offer? Do I still need to provide the flyer?**

With ZurichPro, this is much simpler! No flyer is required. Special offers, if applicable, can be selected at the 'Quote' stage. You will have access to the latest special offers when you are online.

Suitable certifier

➤ **How can I assist financial professionals who are not suitable certifiers, and have no active ZIO (Zurich International Online) account work on ZurichPro?**

You can help your financial professional team members get themselves registered as suitable certifiers. As a suitable certifiers, they will be able to access your ZurichPro account along with valid and active ZIO account.

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