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The Adviser Portal & Data feeds

User Guide

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The Adviser Portal & Data feeds

To make life easy we have created a short user guide to help you set up your data feed in The Adviser Portal, and to register your details into your financial planning software.

This user guide contains details on the following:

- New Data Feed registration and confirmation
- Registering in you Financial Planning Software
- Cancelling your Data Feed service

Please note: If you have already registered for a data feed with Zurich, you do not need to again. To add any new or additional adviser codes, please contact your site administrator.

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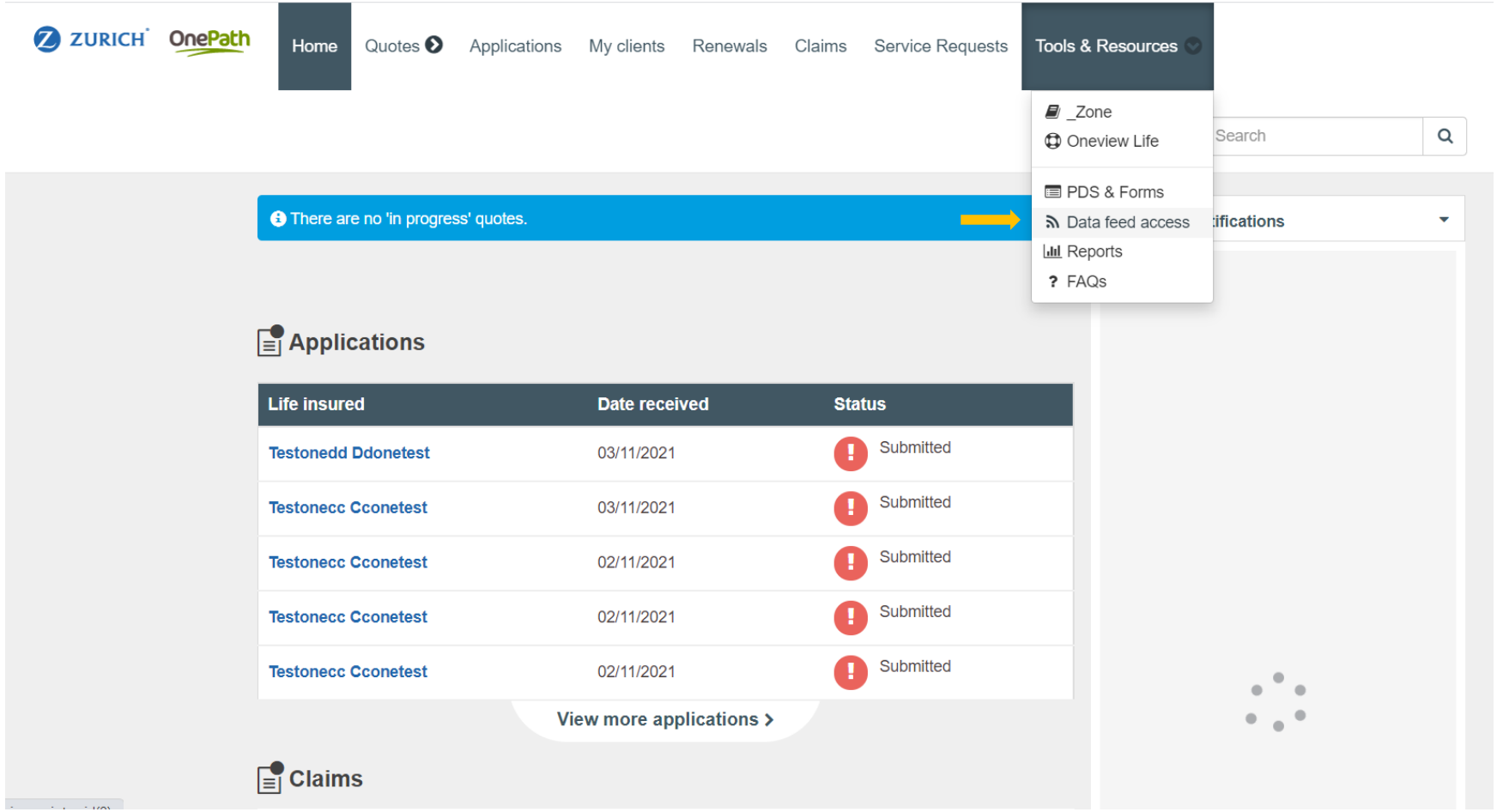
New Data Feed registration and confirmation

All requests for data feeds must be submitted through The Adviser Portal - at https://zurichau.force.com/s/login/

Select Tools & Resources on the top navigation bar, and then select Data feed access from the drop down menu.



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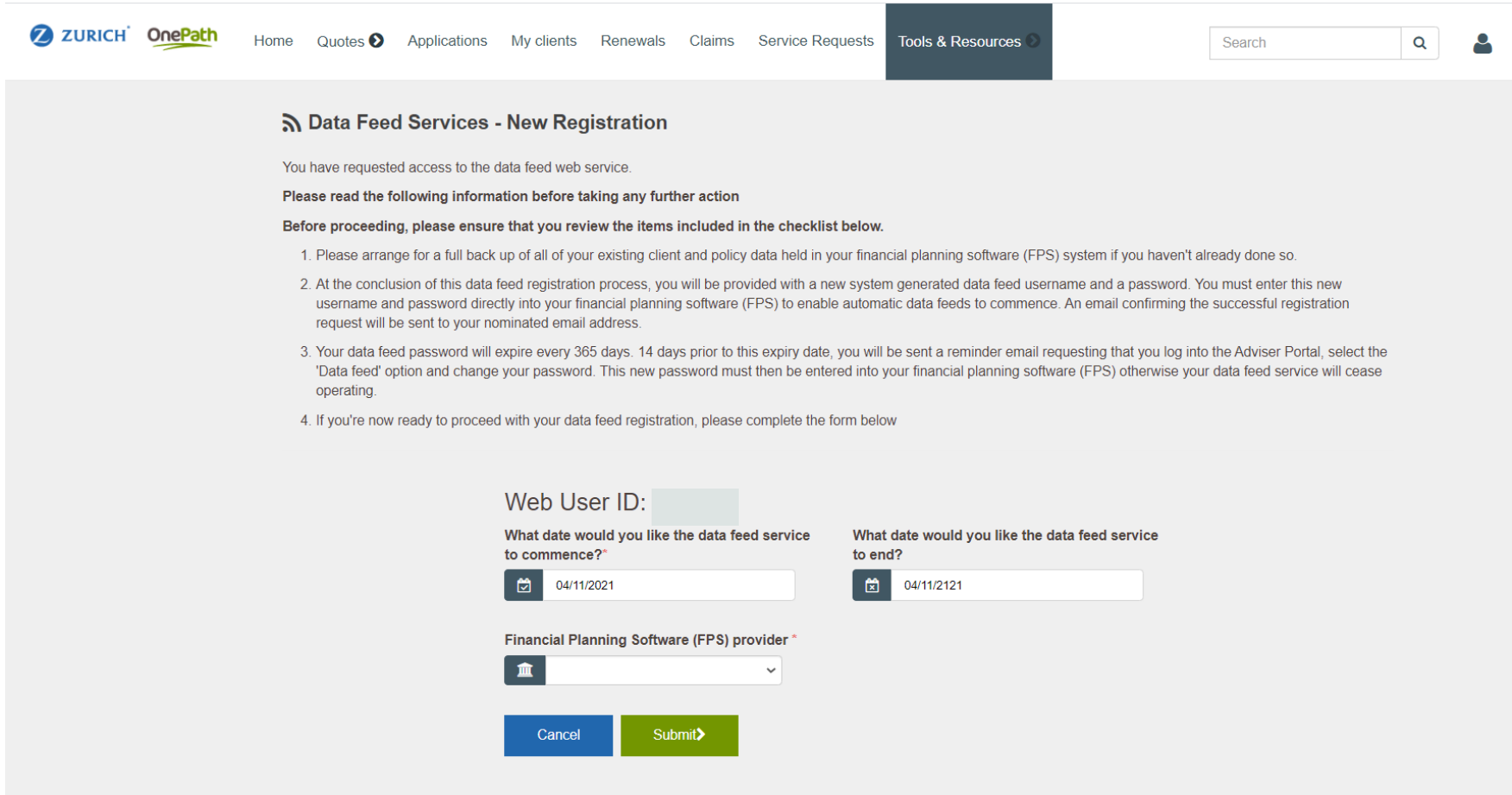
New registration

The first page in this process describes the steps you are recommended to take before proceeding with the data feed registration.

Select the date you would like the data feed to commence (the end date is optional), and your Financial Planning Software (FPS) provider.

Click Submit to confirm your registration.



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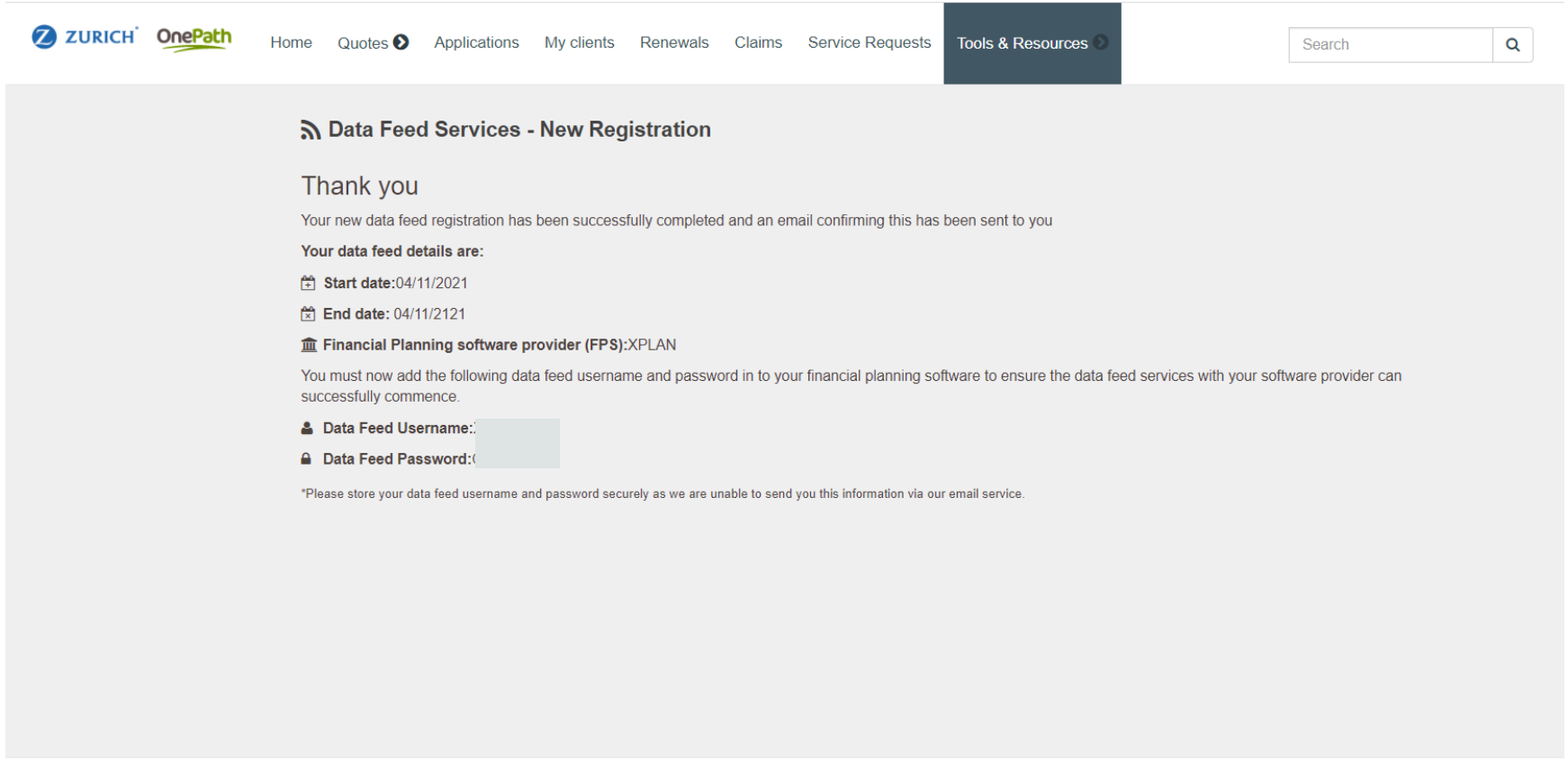
New registration confirmation

You will be presented with details which will confirm that the data feed registration process has successfully completed.

The Adviser Portal allows data feeds to be set up via XPAN, Platform Plus, Adviser Logic & Adviser Intelligence.



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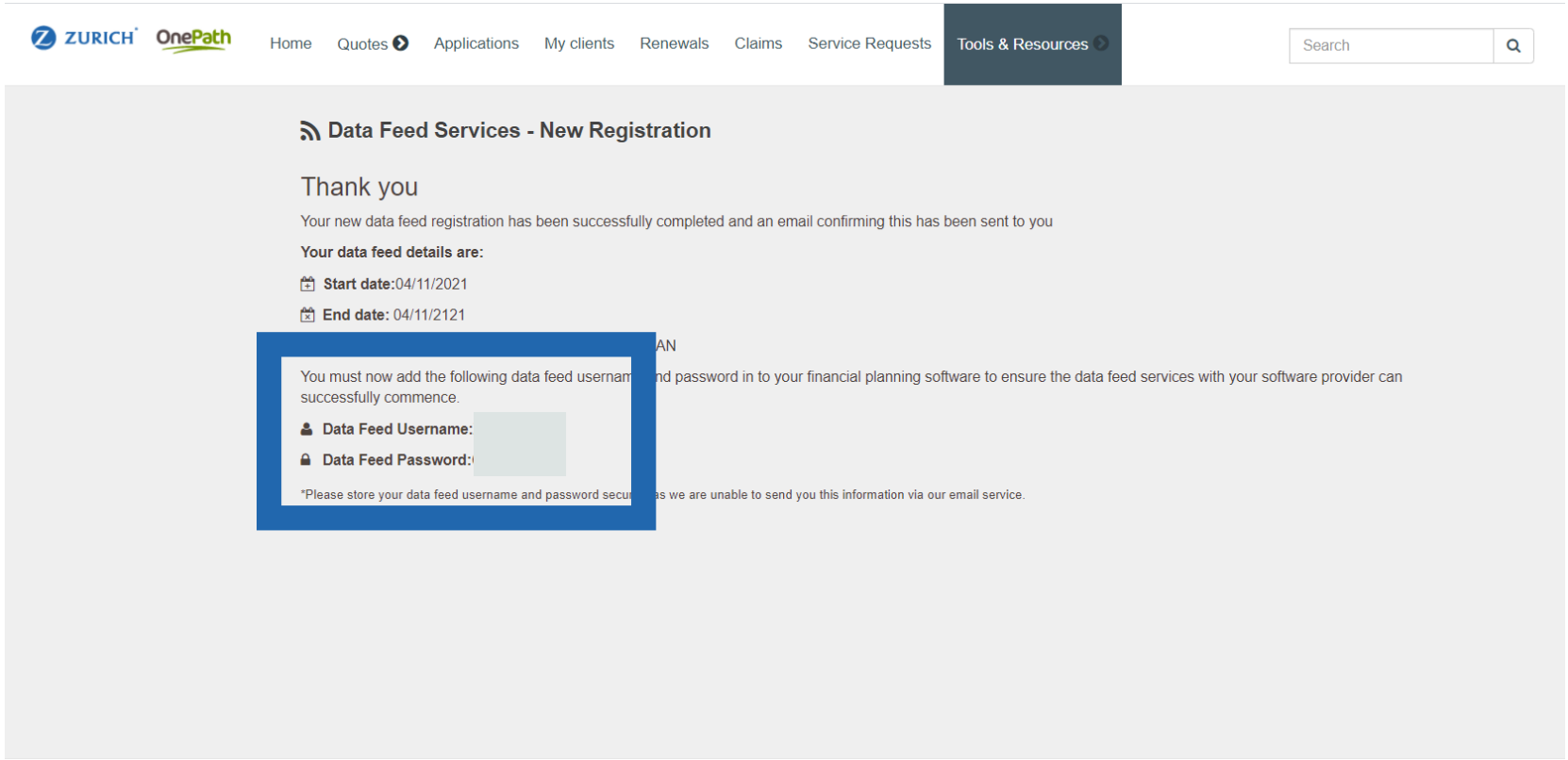
Registering in your Financial Planning Software

Your username and password credentials provided by The Adviser Portal will need to be stored safely as they will need to be entered into your relevant financial planning software.

Please contact your site administrator with the information highlighted in the example so they can set up the Zurich data feed for you.

In the case of multiple adviser codes: although only one registration is required in The Adviser Portal, one XPLAN (or alternate software) registration must be made separately for each adviser code.



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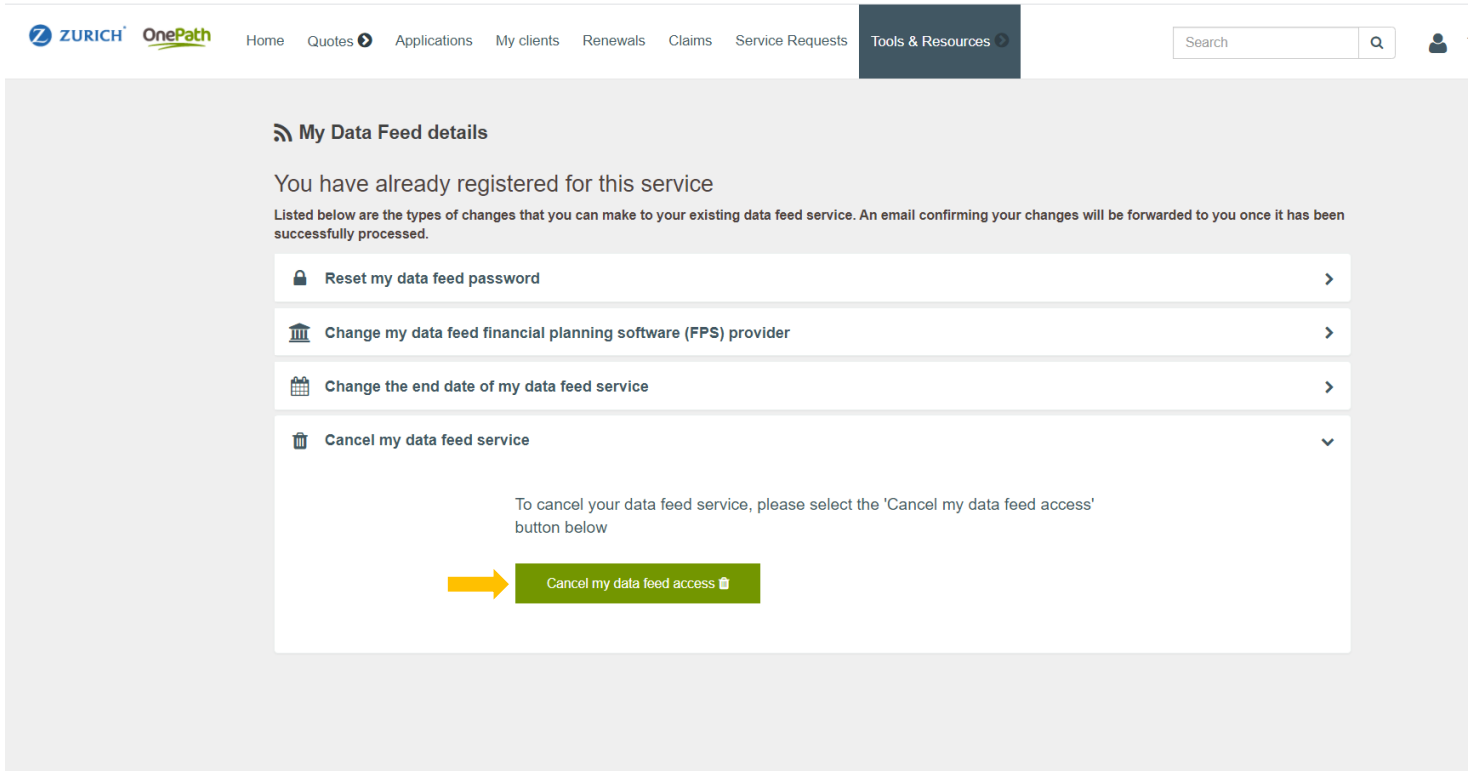
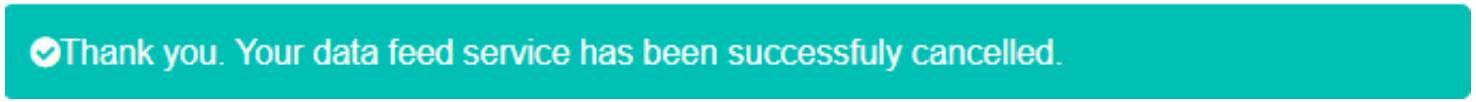
Cancelling your Data Feed service

If you would like to cancel your Data Feed service, please follow the steps below.

- Select Tools & Resources on the top navigation bar
- Select Data feed access from the drop down menu.
- Select Cancel my data feed access from the options on the page
- A confirmation notification will appear, as illustrated.





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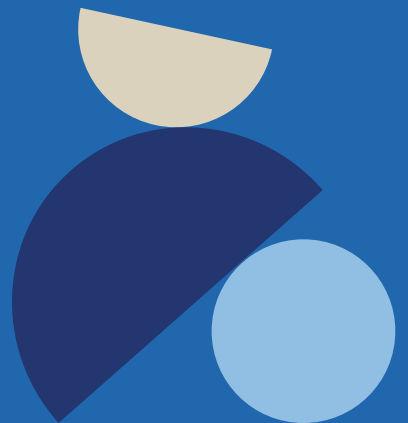
For any further queries, please contact your BDM

Thank you



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