

# The Adviser Portal & Data feeds

User Guide



# 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.



# 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.

The screenshot shows the Zurich OnePath portal interface. The top navigation bar includes 'Home', 'Quotes', 'Applications', 'My clients', 'Renewals', 'Claims', 'Service Requests', and 'Tools & Resources'. The 'Tools & Resources' dropdown menu is open, showing options: '\_Zone', 'Oneview Life', 'PDS & Forms', 'Data feed access', 'Reports', and 'FAQs'. A blue notification bar at the top of the main content area states 'There are no 'In progress' quotes.' Below this, the 'Applications' section is visible, featuring a table with the following data:

Life insured	Date received	Status
Testonedd Ddonetest	03/11/2021	Submitted
Testonecc Cconetest	03/11/2021	Submitted
Testonecc Cconetest	02/11/2021	Submitted
Testonecc Cconetest	02/11/2021	Submitted
Testonecc Cconetest	02/11/2021	Submitted

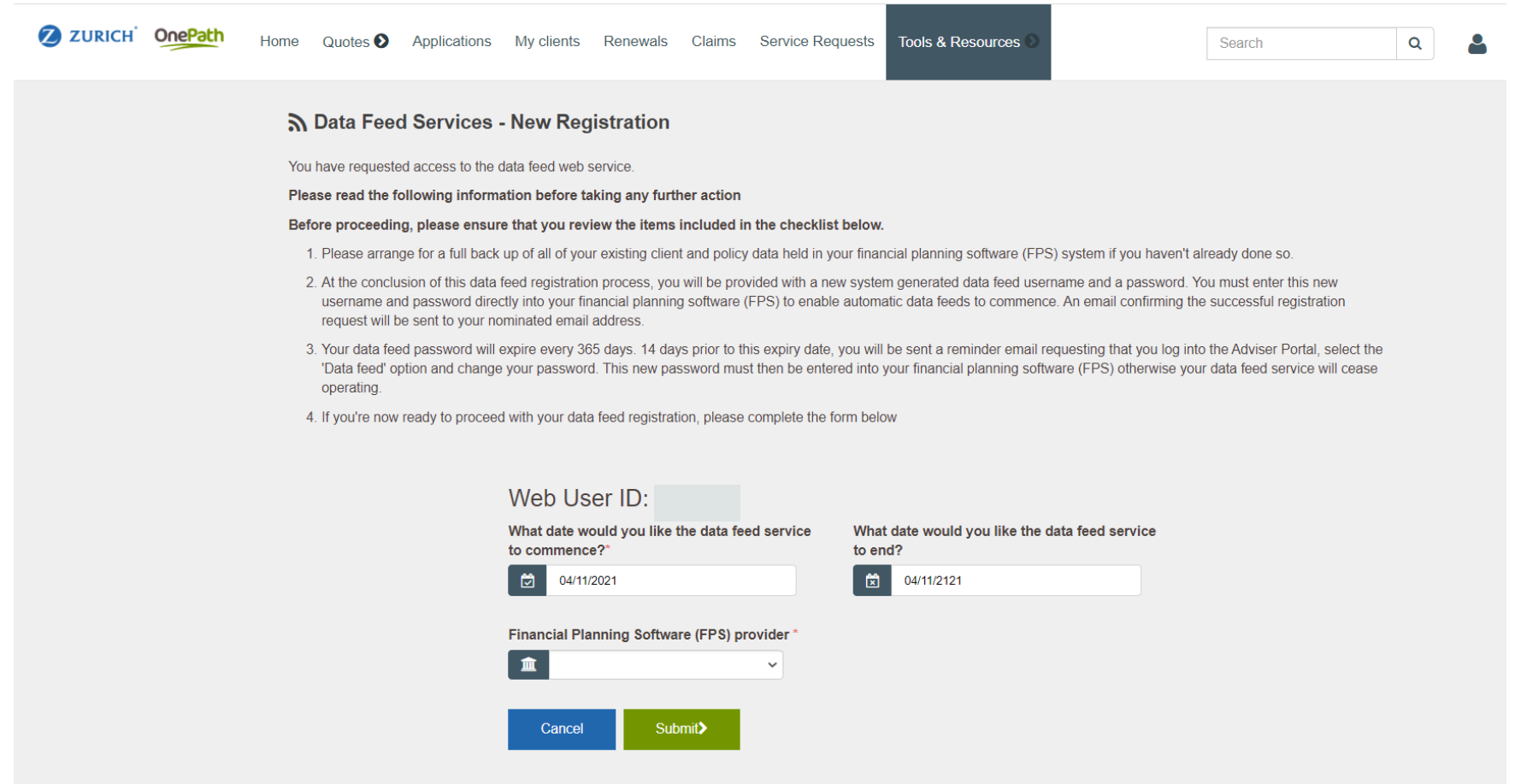
Below the table is a 'View more applications >' button. The 'Claims' section is partially visible at the bottom.

# 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.



**Data Feed Services - New Registration**

You have requested access to the data feed web service.

**Please read the following information before taking any further action**

**Before proceeding, please ensure that you review the items included in the checklist below.**

1. Please arrange for a full back up of all of your existing client and policy data held in your financial planning software (FPS) system if you haven't already done so.
2. At the conclusion of this data feed registration process, you will be provided with a new system generated data feed username and a password. You must enter this new username and password directly into your financial planning software (FPS) to enable automatic data feeds to commence. An email confirming the successful registration request will be sent to your nominated email address.
3. Your data feed password will expire every 365 days. 14 days prior to this expiry date, you will be sent a reminder email requesting that you log into the Adviser Portal, select the 'Data feed' option and change your password. This new password must then be entered into your financial planning software (FPS) otherwise your data feed service will cease operating.
4. If you're now ready to proceed with your data feed registration, please complete the form below

Web User ID:

What date would you like the data feed service to commence?\*

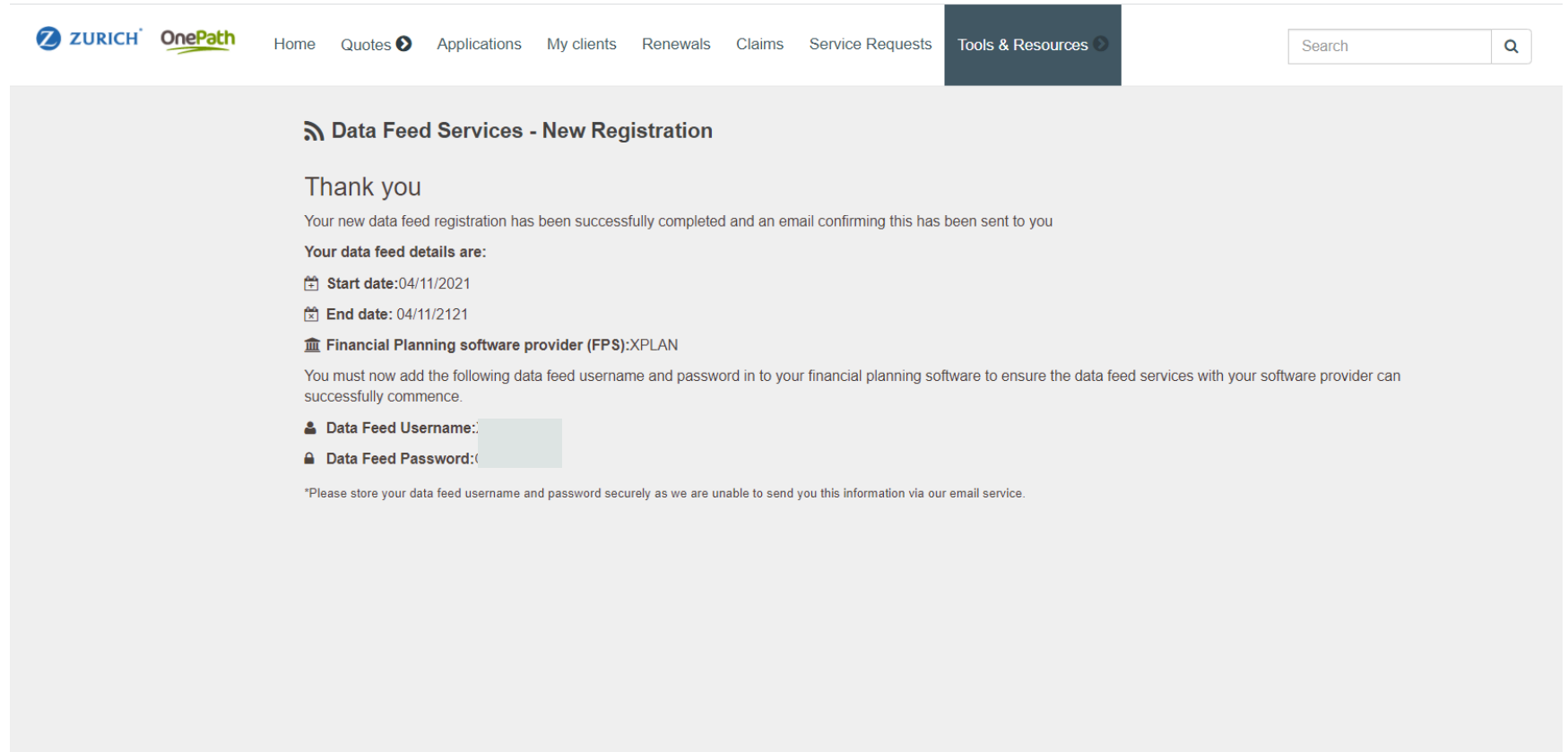
What date would you like the data feed service to end?

Financial Planning Software (FPS) provider \*

# 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.



The screenshot shows the Zurich OnePath portal interface. At the top, there is a navigation bar with the Zurich and OnePath logos, and menu items: Home, Quotes, Applications, My clients, Renewals, Claims, Service Requests, and Tools & Resources. A search bar is located on the right side of the navigation bar. The main content area is titled "Data Feed Services - New Registration" and contains the following text:

**Thank you**  
Your new data feed registration has been successfully completed and an email confirming this has been sent to you

**Your data feed details are:**

- Start date:** 04/11/2021
- End date:** 04/11/2121
- Financial Planning software provider (FPS):** XPLAN

You must now add the following data feed username and password in to your financial planning software to ensure the data feed services with your software provider can successfully commence.

**Data Feed Username:** [REDACTED]

**Data Feed Password:** [REDACTED]

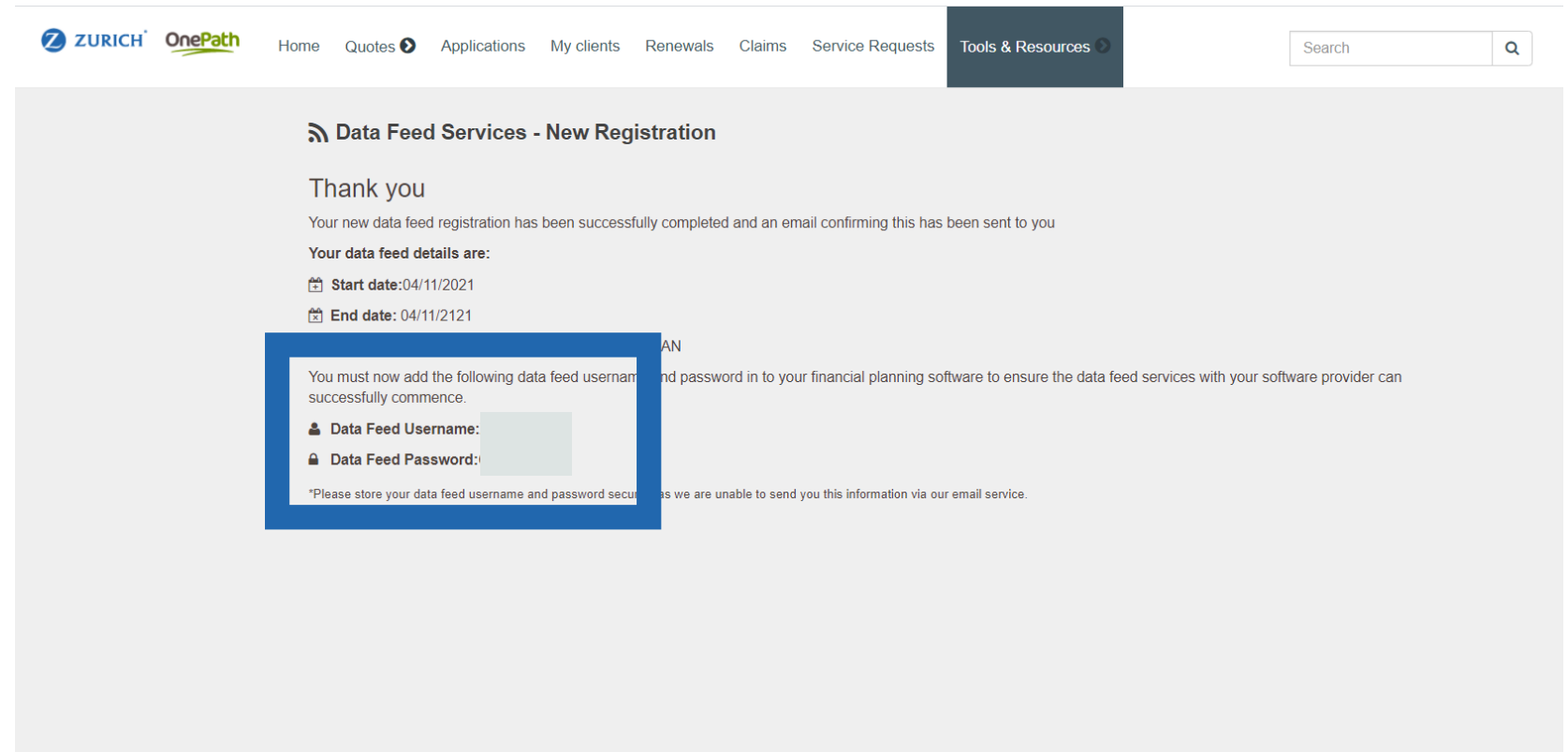
\*Please store your data feed username and password securely as we are unable to send you this information via our email service.

# 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.

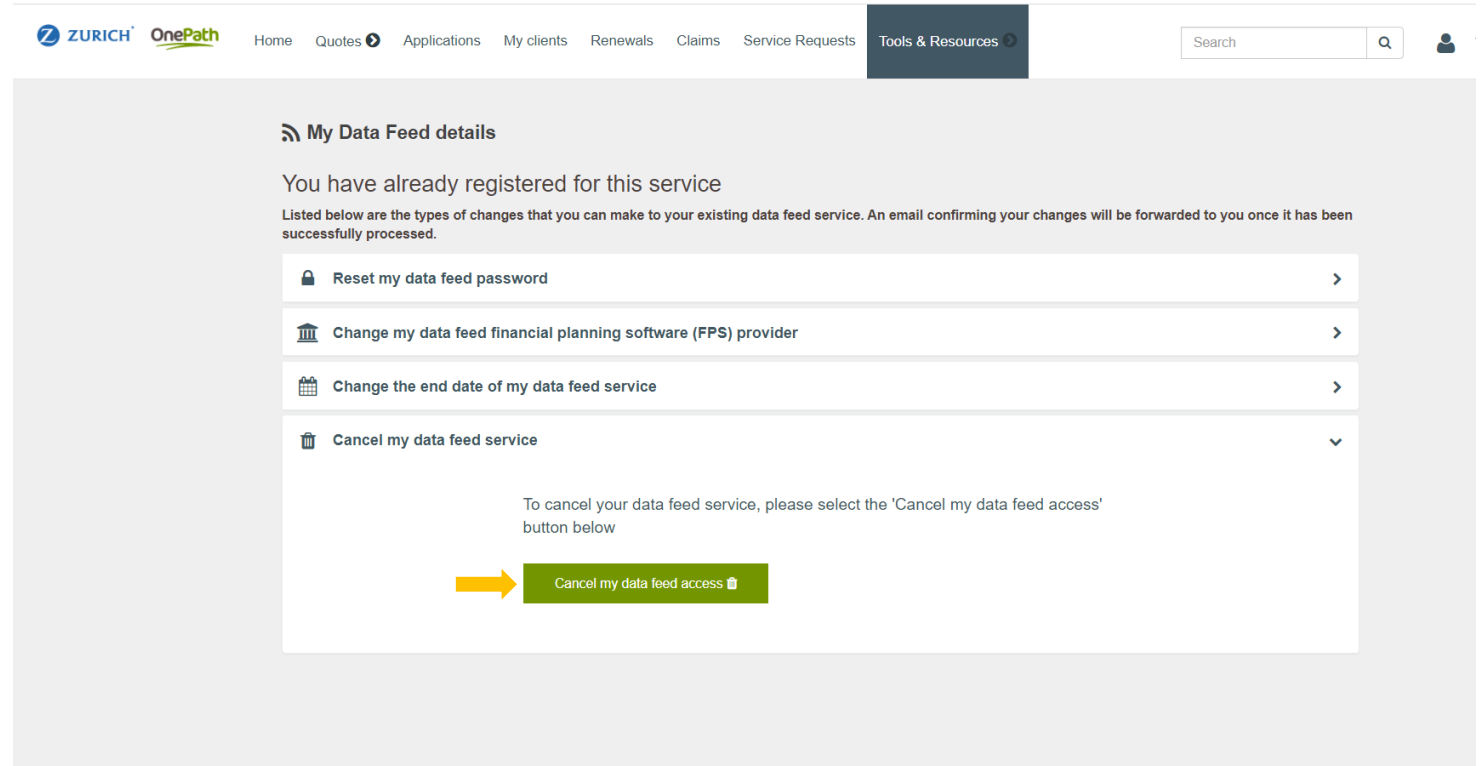


The screenshot shows the Zurich OnePath website interface. At the top, there is a navigation bar with the Zurich and OnePath logos, and menu items: Home, Quotes, Applications, My clients, Renewals, Claims, Service Requests, and Tools & Resources. A search bar is located on the right. The main content area is titled "Data Feed Services - New Registration" and includes a "Thank you" message. Below the message, it states "Your new data feed registration has been successfully completed and an email confirming this has been sent to you". It then lists "Your data feed details are:" with "Start date: 04/11/2021" and "End date: 04/11/2121". A blue box highlights a section that says "You must now add the following data feed username and password in to your financial planning software to ensure the data feed services with your software provider can successfully commence." Below this, there are two fields: "Data Feed Username:" and "Data Feed Password:". A footnote at the bottom of the highlighted box reads: "\*Please store your data feed username and password securely as we are unable to send you this information via our email service."

# 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.



**My Data Feed details**

You have already registered for this service

Listed below are the types of changes that you can make to your existing data feed service. An email confirming your changes will be forwarded to you once it has been successfully processed.

- Reset my data feed password
- Change my data feed financial planning software (FPS) provider
- Change the end date of my data feed service
- Cancel my data feed service

To cancel your data feed service, please select the 'Cancel my data feed access' button below

Cancel my data feed access

✔ Thank you. Your data feed service has been successfully cancelled.

For any further queries, please contact your BDM

Thank you

