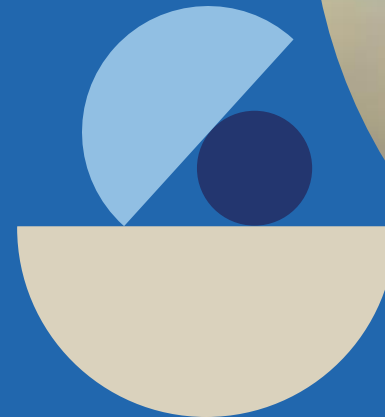


# The Adviser Portal: Delegating access to staff

November 2023



# Summary

The Adviser Portal has many functions that can help bring your business greater efficiencies.

In this pack, we will look at the delegation feature. Delegation allows your staff to register to the portal using their own details, login as themselves, then impersonate the profile of whoever has delegated them access. This allows the delegated user to view quotes, unsubmitted applications, clients, policy details, renewal information etc..

Over the next few slides, this pack will show you how simple it is set up, to have your staff ready to go in no time.



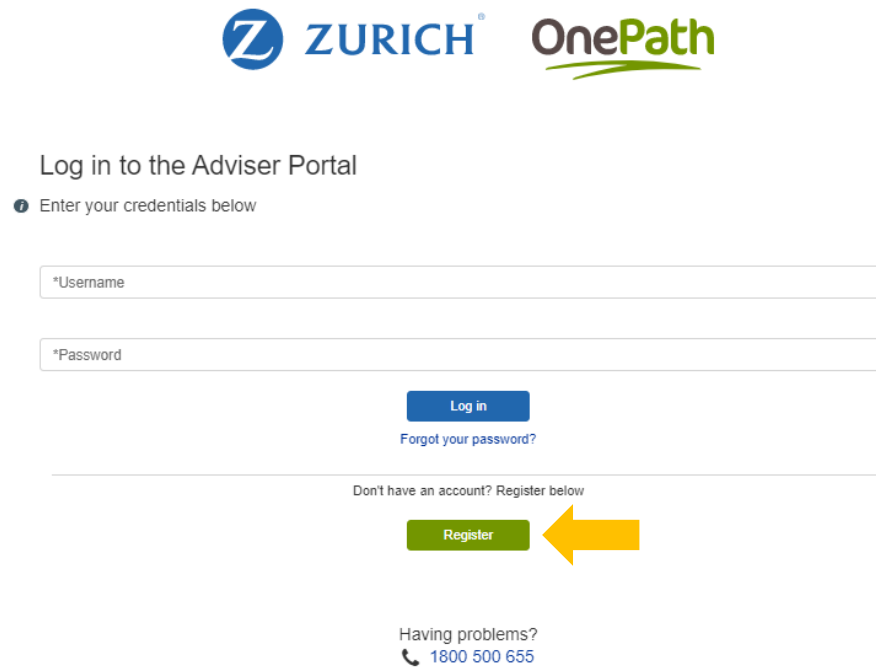
# Logging in

As an adviser, to delegate access, you first must login to the portal.

To do so, here's a link to the login page - [zurichau.my.site.com/s/login/](https://zurichau.my.site.com/s/login/).

Simply login using your existing details, or alternatively, if you're a new user, register using the register button highlighted.

The registration process is swift, allowing you to be in the portal within minutes.



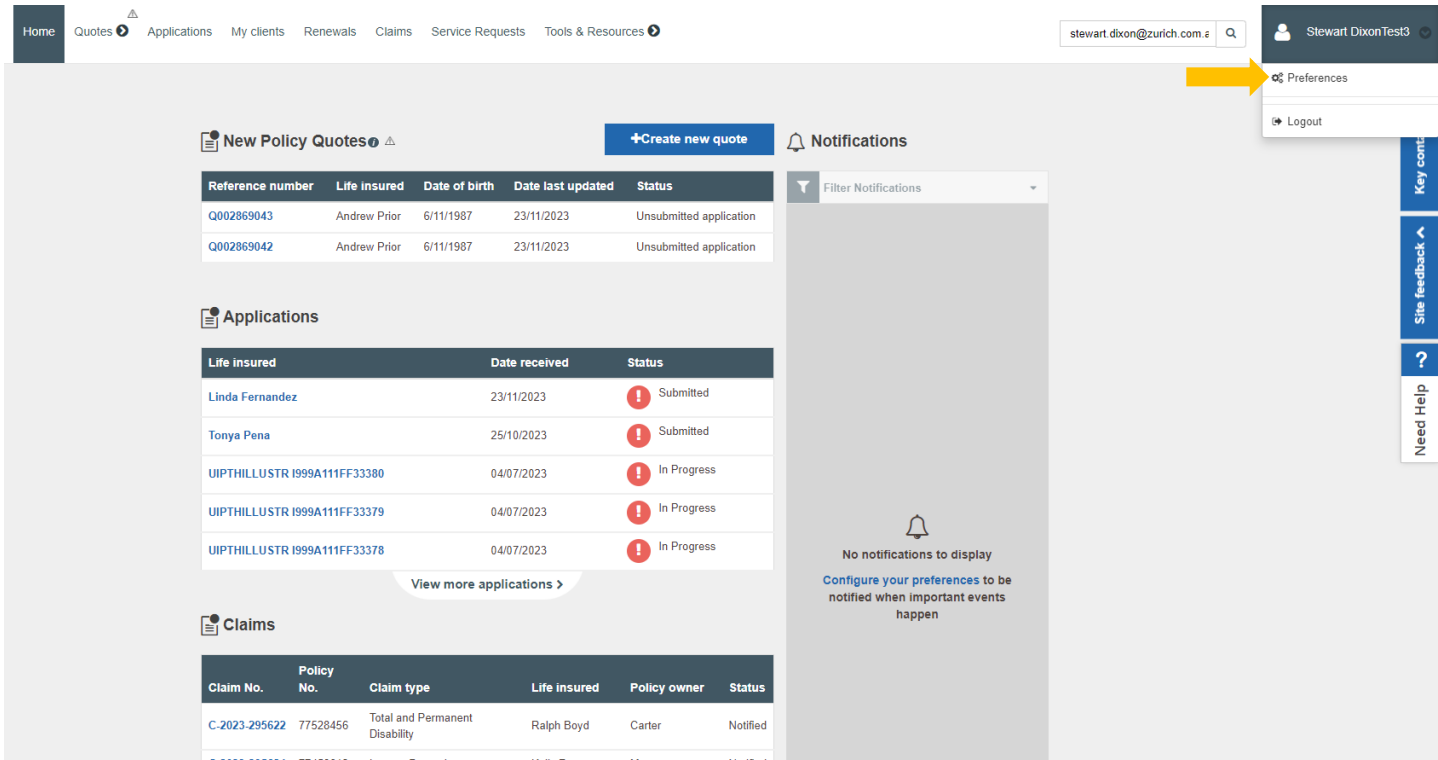
The screenshot shows the login interface for the Zurich OnePath Adviser Portal. At the top, the Zurich and OnePath logos are displayed. Below them, the heading 'Log in to the Adviser Portal' is followed by an instruction 'Enter your credentials below'. There are two input fields: '\*Username' and '\*Password'. A blue 'Log in' button is positioned below the password field, with a link 'Forgot your password?' underneath it. A horizontal line separates the login section from the registration section. Below the line, the text 'Don't have an account? Register below' is shown, followed by a green 'Register' button. A large yellow arrow points to the 'Register' button. At the bottom, there is a link 'Having problems?' with a phone icon and the number '1800 500 655'.

# Dashboard

Once you've logged in, you will land on the home dashboard, where you will get a snapshot of what's occurring with your book of clients.

Setting up delegation can be achieved via the preferences option, which, as shown the image, can be found by selecting the users name in the top right of the screen.

Selecting this option will give you the option of updating your contact details, changing your password, setting up notifications, as well as managing delegations.

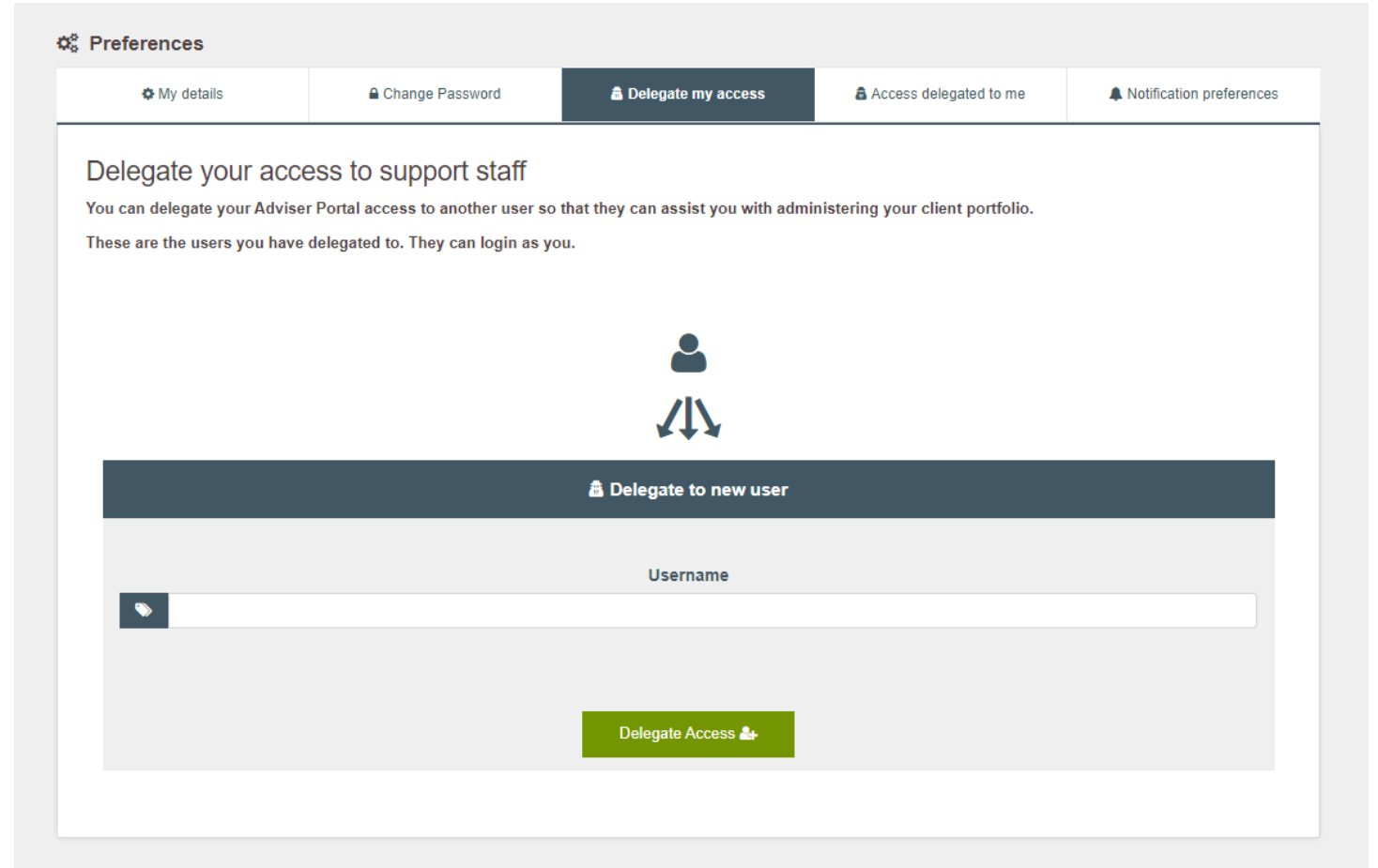


# Preferences

Upon selecting the preferences option, you will note tabs to update details, change password & set up notifications on new business, renewals, weekly summary email & more.

It's important to note that any user you wish to delegate access to must register themselves to the portal before delegation can be set up.

To delegate access to another registered user, select the middle tab, where you will be presented with an option to nominate a username. Simply enter the username (registered email) of the person you wish to delegate access to.

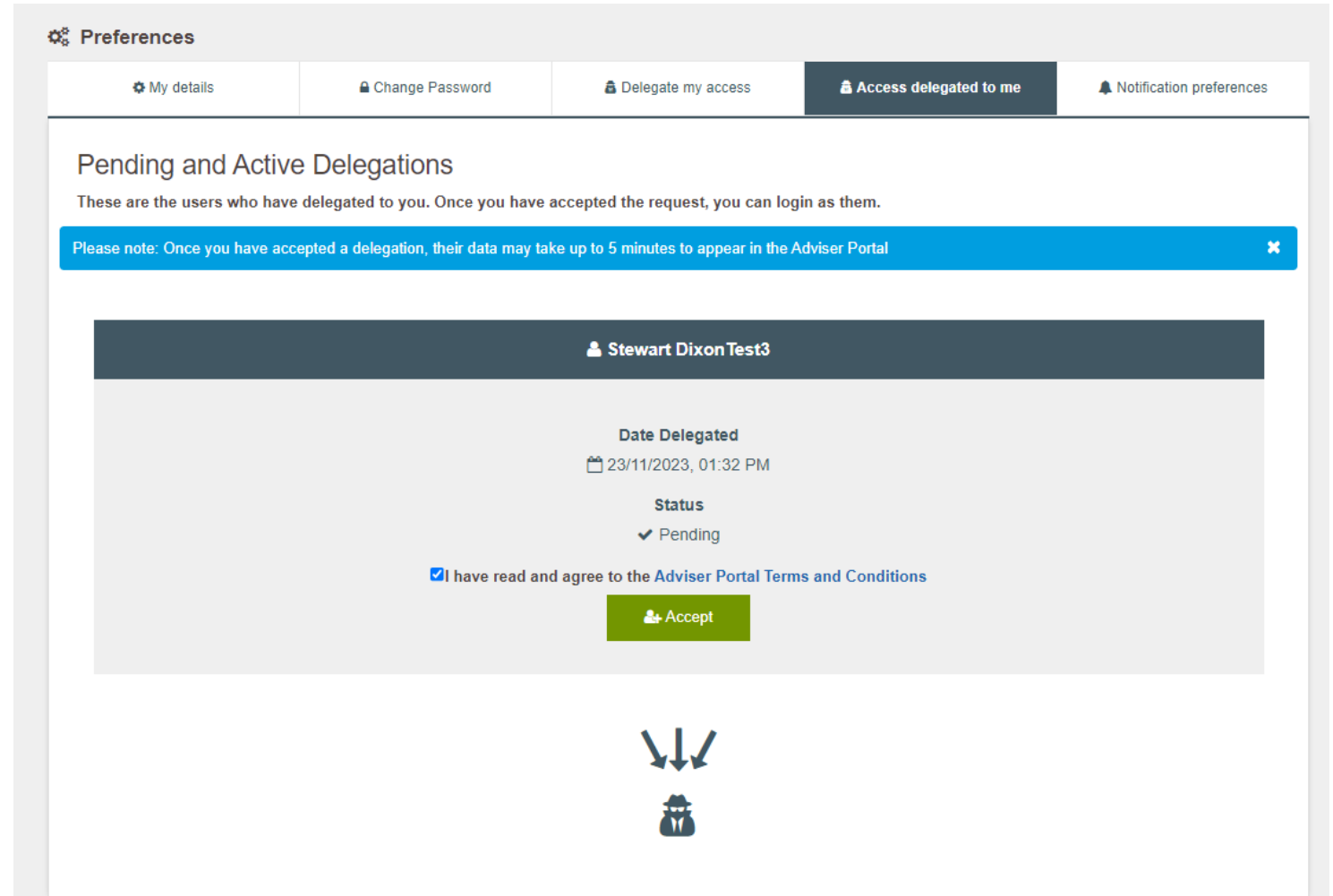


The screenshot shows the 'Preferences' section of the Zurich Adviser Portal. The 'Delegate my access' tab is selected. The main heading is 'Delegate your access to support staff'. Below this, it states: 'You can delegate your Adviser Portal access to another user so that they can assist you with administering your client portfolio. These are the users you have delegated to. They can login as you.' A user icon with three arrows pointing down is shown. Below this is a dark blue bar with the text 'Delegate to new user'. Underneath is a light gray box with a 'Username' label and a text input field. At the bottom right of this box is a green button labeled 'Delegate Access' with a plus icon.

# Preferences

Once you have submitted the delegation, the user will receive a notification via email, and can accept the delegation in the “Access delegated to me” tab after logging into the portal.

If at any stage you wish to revoke a delegation, this can be done via the “Delegate my access” tab.

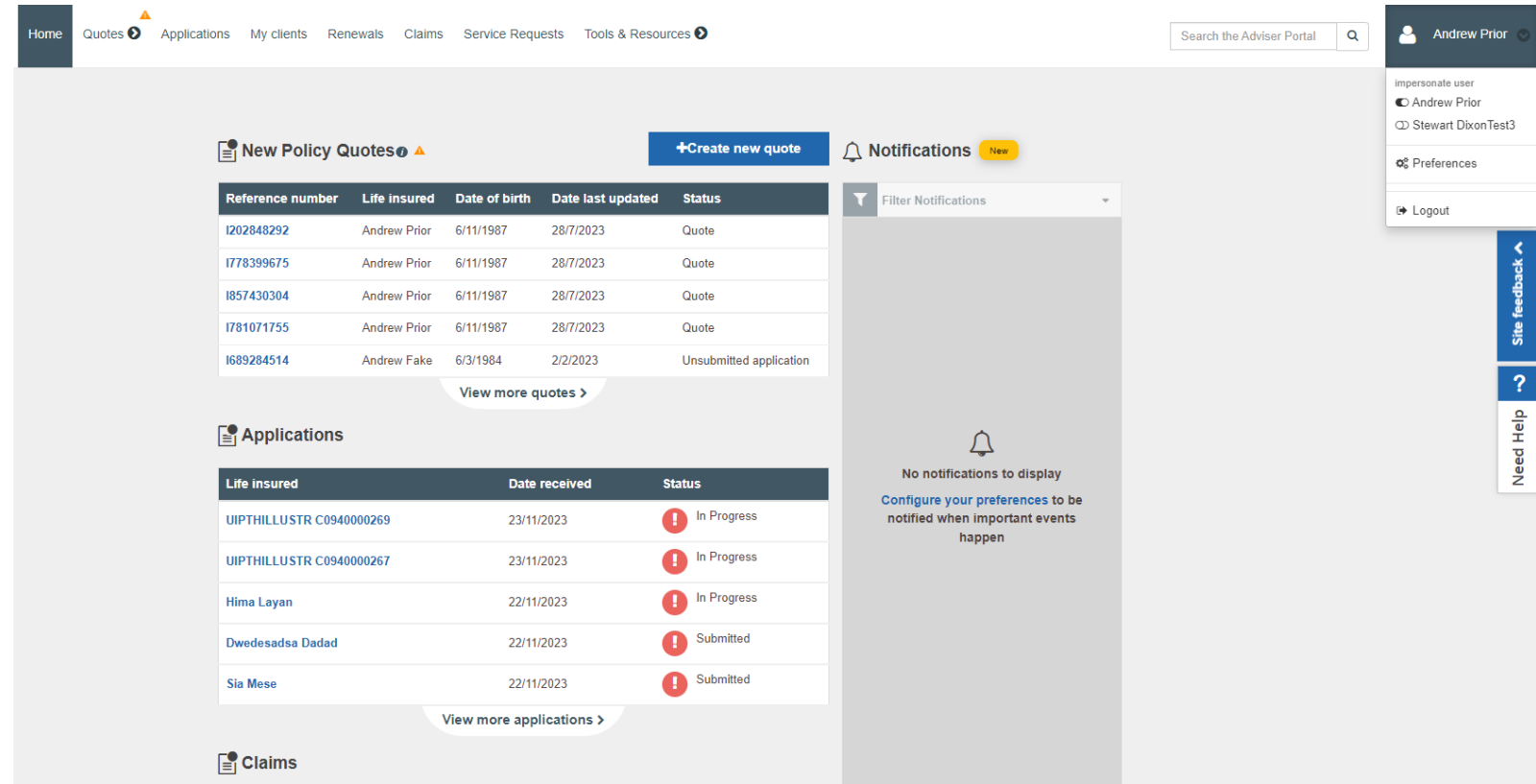


# Preferences

Once the delegation has been accepted, the user will be able to view users who have delegated them access by again selecting the users name at the top right of the screen.

Upon selecting it this time, you will notice the name of the user who has delegated you access appearing in the drop down.

To switch between profiles, simply select the toggle option next to each respective user listed. The system will proceed to switch to the profile selected, providing you with all data available under that user.



Home Quotes Applications My clients Renewals Claims Service Requests Tools & Resources

Search the Adviser Portal

Andrew Prior

impersonate user  
Andrew Prior  
Stewart DixonTest3

Preferences

Logout

Site feedback

Need Help

### New Policy Quotes

+Create new quote

Notifications New

| Reference number | Life insured | Date of birth | Date last updated | Status                  |
|------------------|--------------|---------------|-------------------|-------------------------|
| 1202848292       | Andrew Prior | 6/11/1987     | 28/7/2023         | Quote                   |
| 1778399675       | Andrew Prior | 6/11/1987     | 28/7/2023         | Quote                   |
| 1857430304       | Andrew Prior | 6/11/1987     | 28/7/2023         | Quote                   |
| 1781071755       | Andrew Prior | 6/11/1987     | 28/7/2023         | Quote                   |
| 1689284514       | Andrew Fake  | 6/3/1984      | 2/2/2023          | Unsubmitted application |

View more quotes >

### Applications

| Life insured             | Date received | Status      |
|--------------------------|---------------|-------------|
| UIPTHILLUSTR C0940000269 | 23/11/2023    | In Progress |
| UIPTHILLUSTR C0940000267 | 23/11/2023    | In Progress |
| Hima Layan               | 22/11/2023    | In Progress |
| Dwedesadsa Dadad         | 22/11/2023    | Submitted   |
| Sia Mese                 | 22/11/2023    | Submitted   |

View more applications >

No notifications to display  
Configure your preferences to be notified when important events happen

### Claims

Thank you

