

# Zurich's Advisor and Employer Portal

Direct Debit  
Contribution Update

- Simple to use
- Access 24/7
- Key information at your fingertips



# Zurich's Advisor and Employer Portal

## Puts you in control of your company pension scheme

Zurich's online Portal puts you in control – providing you with all the information you need to manage your company pension scheme, both at scheme and member level, all from one central location.

It's easy to use and offers you a wealth of information 24/7.

Available for all your DC schemes with Zurich (including Fusion, PRSA, and AVC schemes), you'll have the access and control you need to make sure you have everything to manage your company pension.

The DC Portal allows you access to the following;

- View Scheme Management Information
- Ability to download the most important management information
- Run comprehensive Group Reports
- Manage Payroll uploads through the GPMS system
- Online Pre-Renewal and member updates for all your DC schemes with Zurich
- Manage your schemes contribution through the new direct debit contribution update service
- Access to our new History page which provides information on all member and contribution changes processed on the scheme through the Portal

This document provides you with an in-depth guide on the direct debit contribution update section of your Portal.

Through the direct debit contribution update service you will have the ability to access the following;

- Update employer, employee and AVC contributions in advance of the upcoming collection date. (Including a bulk upload feature)
- Update member leaver details
- Information on salary deduction and direct debit collection month for your DC scheme
- Access to historical direct debit collections

Your dedicated support team will still just be a phone call away, but our new Portal enhancement means you can keep member records up to date throughout the year.

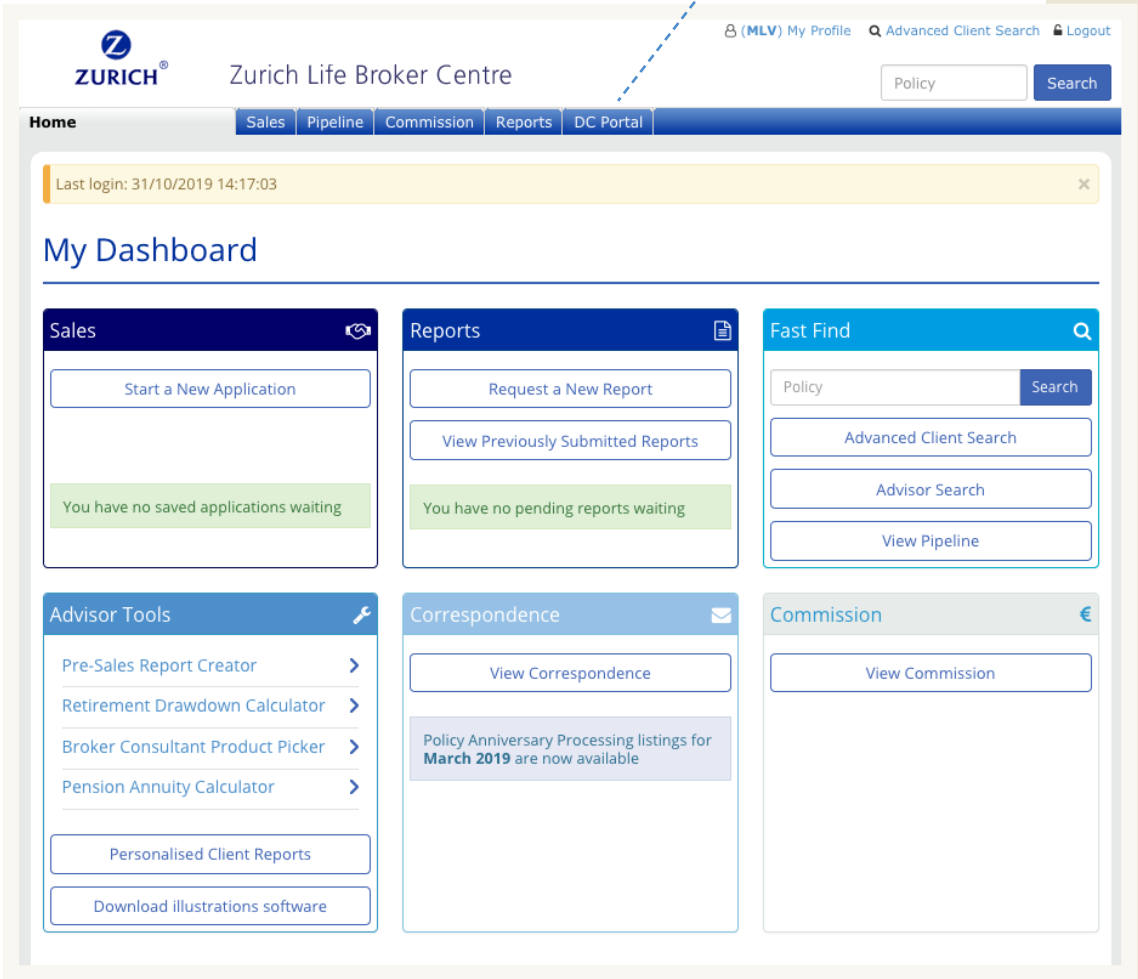


To get started, just visit  
**[www.zurich.ie](http://www.zurich.ie)**

If you are not registered and would like access to the Portal, email **[customerservices@zurich.ie](mailto:customerservices@zurich.ie)** or call **01 799 2711** and we'll get you set up.

As a Scheme Advisor, you'll access the Portal through the Broker Centre

Click here to navigate to the Portal



As an Advisor this is the landing page you will arrive at when you log on to the secure website.

If you are an Employer, your view will differ slightly, depending on your specific accesses.

# Your list of group schemes

Home > Group List

Group List

Group Name  Group Number  Sort By

[Download Data](#)

Group Name	Group Number	Zurich Master Trust	Active Members	Deferred Members	Annual Contribution	AUM
Centric Health Group Pension Scheme	407120768	N	164	26	€1,156,449	€7,385,223
Solihull Group Pension Scheme	407120768	N	102	28	€1,147,569	€16,316,029
BPV Group Pension Scheme	407120768	N	126	41	€1,138,927	€11,779,907
ESB Additional Voluntary Contributions Scheme	407120768	N	428	186	€1,117,777	€66,615,933
Informatica Ireland SPBA Limited Group Pension	407120768	N	98	42	€1,087,011	€13,645,012
AGL Airlines (Ireland) Ltd Group Pension	407120768	N	152	22	€1,076,203	€6,753,787
EMAC Ireland Ltd Profit Sharing Pension Plan	407120768	N	162	169	€1,072,031	€18,892,102
Hudson - Lone Star Airline DC Plan	407120768	N	59	2	€1,065,043	€24,289,039
Globalisation Partners Pension Scheme	407120768	N	131	2	€1,051,305	€2,260,837
The News Ireland Pension Plan	407120768	N	103	99	€1,024,932	€57,620,401
Care Computer Consultants Ltd Pension Scheme	407120768	N	136	90	€1,021,220	€23,849,299
Gartner Ireland Limited	407120768	N	53	35	€1,020,687	€7,668,442
Cambridge International Pension Plan	407120768	N	121	169	€1,011,473	€26,866,449

**IMPORTANT NOTES**

Active members are defined as a member meeting one of the following criteria;

- at least one premium paying or in-skip policy, or;
- any member with single premium only policies where no leaving service options have been processed.

Deferred members are defined as a member who has no premium paying or in-skip policies but at least one in force or awaiting revival policy. Any member with single premium only policies are defined as deferred if leaving service options have been processed for this member.

Annual contributions is defined as the total annual contributions in respect of all members in the scheme.

AUM is defined as the total assets under management in respect of all active and deferred members in the scheme. The values shown will not include any special dividends or encashment penalties that might apply at a policy level. Values shown are not guaranteed, and they can fall as well as rise.

Any unprocessed units or policies on our manual database will not be reflected in the assets under management displayed.

All information displayed is correct based on the data held on our system as at 30/03/2022 14:49.

[Click on the group number to view the group details](#)

Any unprocessed units or policies on our manual database will not be reflected in the assets under management displayed.

All information displayed is correct based on the data held on our system as at 05/12/2019 06:29.

The 'Group List' page provides a summary of all schemes which you should have access to view.

As an Advisor, all of your schemes with Zurich will be displayed here.


As an employer, you will only see the "Group List" if you have more than one scheme with Zurich. In the case where only one scheme is linked, the user will be directed straight to the "Group Info" screen.


# Group Information


Group Info


Frascati Holdings Limited


Group Number	60523519	Revenue Approval Number	SF0000
Group Type	DC Scheme	Pension Authority Number	PB0000
Zurich Corporate Pension Team	4		
Zurich Contact	01 799 2636	ZCP4@Zurich.Com	

Group MI

Members

History

Group Report

Direct Debit Contribution Update

Once you select a Group you are directed to the Group Details.

The new “Direct Debit Contribution Update” service has now been added to the group landing page.

A number of high level group specific details are displayed here along with access to the various online journeys available on the Portal.

Currently the Portal offers the user access to:


- Group Management Information
- Member Updates & Pre-Renewal
- History
- Group Report
- Direct Debit Contribution Updates


# Direct Debit Contribution Update – Landing Page


Group Info


Frascati Holdings Limited			
Group Number	60523519	Revenue Approval Number	SF0000
Group Type	DC Scheme	Pension Authority Number	PB0000
Zurich Corporate Pension Team	4		
Zurich Contact	01 799 2636	ZCP4@Zurich.Com	

2


Group MI

Members

History

Group Report

1

Direct Debit Contribution Update

The Portal landing page has been redesigned to accommodate the new Direct Debit Contribution Update service.

1. The new service is now included as an option on the Group Info page.
2. The existing options (Group MI, Members, History and Group Report) will still be available on the landing page.

Monthly email notifications will be issued to your scheme contact with a reminder of the upcoming direct debit collection dates. The following timelines will apply each month;

- The notification email will be sent 12 days before the next billing date.
- Changes in contribution for that month must be submitted online before the billing date.
- Billing will then occur 7 days before the next direct debit collection date.

Users will be able to make changes to the following months contribution as soon as the current months direct debit is collected and applied on our administration system.

# Direct Debit Contribution Update

## - Members

Only active members of the group will be displayed on the members page.

The following member details are displayed:

- Salary Deduction Month
- Direct Debit Collection date
- Member Reference
- Member Name
- Employer Contribution
- Employee Contribution
- AVC Contribution
- Total Contribution
- Member Status

By hovering over each column header you can generate a tool tip which provides more information on each.

The employer, employee and AVC fields can be updated using the edit button, we will see that in more detail on the next page of the guide.

Should you wish to update “Member Reference”, “Member Name” or “Collection Date”, please contact your service team directly.

Each column can also be sorted to order the members in whichever way suits your needs and there is a filter option if you need to search out a specific member.

The total contributions for the group in respect of employer, employee and AVCs amounts is also included on the banner at the bottom of the member table .

We have also included a number of useful aids to help you along the journey.

The “User Guide” icon will provide a pop up screen with tips and information on the journey as well as a link to this very guide.

The “Bulk Upload” icon will allow you to upload a spreadsheet of contributions for the current active members of the group.

The “Bank Account Collection History” icon will allow you to view historical direct debit collections for the scheme broken down by member.

Further details on the bulk upload can be found later in the guide.

### Frascati Holdings Limited

Group Number: 60523519











Salary Deduction Month: July 2022 Direct Debit Collection Month: July 2022

Filter table

 User Guide

 Bulk Upload

 Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution ↑	Employee Contribution	AVC Contribution	Total Contribution	Member Status	Edit
170400P	Ms. JENNIFER BARR	01/07/2022	10.00	10.00	0.00	20.00	Active	
170400T	Ms. JENNIFER BARR	01/07/2022	82.26	58.75	0.00	141.01	Active	
170400B	Ms. JENNIFER BARR	01/07/2022	91.54	65.40	25.00	181.94	Active	
170400C	Ms. JENNIFER BARR	01/07/2022	100.00	100.00	0.00	200.00	Active	
170400D	Ms. JENNIFER BARR	01/07/2022	100.00	60.00	0.00	160.00	Active	
170400E	Ms. JENNIFER BARR	01/07/2022	135.47	96.78	0.00	232.25	Active	
170400F	Ms. JENNIFER BARR	01/07/2022	139.57	99.71	0.00	239.28	Active	
170400G	Ms. JENNIFER BARR	01/07/2022	144.34	103.13	0.00	247.47	Active	
170400H	Ms. JENNIFER BARR	01/07/2022	147.86	105.63	0.00	253.49	Active	
170400I	Ms. JENNIFER BARR	01/07/2022	148.86	106.35	0.00	255.21	Active	
Total Contribution Amount (Overall)			14,356.03	9,226.16	902.86	24,485.05		

Items per page: 10


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# Direct Debit Contribution Update - Contribution Updates

1. The first step when completing a specific member contribution update is to click the "Edit" icon for the member you would like to update.




Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution ↓	Total Contribution	Member Status	Edit
01755519	Douglas, David	01/07/2022	400.00	100.00	600.00	1,100.00	Active	










**Frascati Holdings Limited**  
Group Number: 60523519

Salary Deduction Month: July 2022   Direct Debit Collection Month: July 2022

Filter table

 User Guide   
  Bulk Upload   
  Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution ↓	Total Contribution	Member Status	Edit
01755519	Douglas, David	01/07/2022	400.00	100.00	600.00	1,100.00	Active	
12607184	Wong, David	01/06/2022	199.87	142.80	428.35	771.02	Active	
12704547	Wong, David	01/07/2022	260.96	186.44	200.00	647.40	Active	
14662162	Wong, David	01/07/2022	234.31	167.39	63.09	464.79	Active	
17144478	Wong, David	01/07/2022	91.54	65.40	25.00	181.94	Active	
20144478	Wong, David	01/06/2022	171.02	122.18	0.00	293.20	Active	
20144478	Wong, David	01/06/2022	499.95	0.00	0.00	499.95	Active	

Douglas, David   Member Reference: 01755519

Direct Debit Collection Date: 01/07/2022   UMR: 12607184

Employer Contribution

400.00

Total Contribution


1100.00

Employee Contribution

100.00

AVC Contribution

600.00

 We will process the information you have provided as soon as possible. While most of the information you have submitted will be updated immediately, certain information may need some verification.

Cancel

Submit

2. Upon clicking the "Edit" icon a side panel will appear onscreen. This panel will display the following information;

- Employer Contribution
- Employee Contribution
- AVC Contribution
- Total Contribution.



# Direct Debit Contribution Update - Contribution Updates

3. Each contribution amount of the three individual contribution types - employer, employee and AVC - can be updated by clicking into the respective field.

As each of the three amounts are updated the "Total Contributions" field will automatically update - the "Total Contributions" field will not be editable directly.

The AVC contribution will only be editable if the member has an existing AVC contribution payable. If no existing AVC is currently payable and this is to be added contact should be made with your Zurich service team.

4. Where the contribution amounts change above or below certain thresholds a warning message will be displayed under the "Total Contributions" field. The following warning messages may apply;

- Revised amount exceeds current contribution by over 100%
- Revised amount is less than the current contribution by greater than 50%
- Maximum increase limit of €5,000 is exceeded

While the first two will be advisory warnings the third will not be permitted and submission will be prevented in this case.

Direct Debit Collection Date: 01/07/2022

Member Reference: 123456789

Direct Debit Collection Date: 01/07/2022

UMR: 123456789

Employer Contribution

1000

Employee Contribution

3000

AVC Contribution

500

Total Contribution

4500.00

The revised contribution amount exceeds the current contribution by greater than 100%, please ensure that this is correct. Single premium once off contributions are not to be processed on this screen, please contact your service team in relation to any such payments

ⓘ We will process the information you have provided as soon as possible. While most of the information you have submitted will be updated immediately, certain information may need some verification.


Cancel

Submit

# Direct Debit Contribution Update - Contribution Updates

5. Once the changes have been submitted you are returned to the member page to continue editing, as you can see, any member contribution changes which have been submitted will be highlighted in green. These changes will remain green as you move through the members until the time you exit the members page.

At this stage any change submitted is now either completed or in a processing queue, you can close this window without losing the changes.



Update to Member Reference has been submitted. X

**Frascati Holdings Limited**  
 Group Number: 60523519

Salary Deduction Month: July 2022   Direct Debit Collection Month: July 2022

Filter table
 

User Guide
 Bulk Upload
 Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution ↓	Total Contribution	Member Status	Edit
10000000	John JOHNSON, Paul	01/07/2022	1,000.00	3,000.00	400.00	4,400.00	Active	
10000001	John JOHNSON, Laura	01/06/2022	199.87	142.80	428.35	771.02	Active	
10000002	John JOHNSON, Jane	01/07/2022	260.96	186.44	200.00	647.40	Active	
10000003	John JOHNSON, Gary	01/07/2022	234.31	167.39	63.09	464.79	Active	
10000004	John JOHNSON, David	01/07/2022	91.54	65.40	25.00	181.94	Active	
10000005	John JOHNSON, Mary	01/06/2022	171.02	122.18	0.00	293.20	Active	
10000006	John JOHNSON, Carol	01/06/2022	499.95	0.00	0.00	499.95	Active	
10000007	John JOHNSON, Carol	01/07/2022	219.98	260.02	0.00	480.00	Active	
10000008	John JOHNSON, David	01/07/2022	1,999.80	200.20	0.00	2,200.00	Active	
10000009	John JOHNSON, Mary	01/07/2022	82.26	58.75	0.00	141.01	Active	
Total Contribution Amount (Overall)			14,956.03	12,226.16	1,116.44	28,298.63		

Items per page: 10
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# Direct Debit Contribution Update - Leavers and Contribution Breaks

The direct debit contribution update service also allows you to advise of any members who have left employment, are on leave or have ceased contributions - these can also be updated through the "Members" service.

The option to update a member status based on contributions will be available through this service under the following conditions;

1. Employer, employee and AVC contributions all set to zero
2. Both employer & employee contributions or AVC contributions set to zero respectively

Where this occurs for a member the leavers section will display under the contribution section of the side panel.

The screenshot shows the 'Direct Debit Contribution Update' form for a member. At the top, it displays 'Member Reference: 123456789'. Below this, the 'Direct Debit Collection Date' is set to '01/07/2022' and the 'UMR' is '10000000'. The form has three input fields for contributions: 'Employer Contribution' (0), 'Employee Contribution' (0), and 'AVC Contribution' (0). The 'Total Contribution' is displayed as '0.00'. Below these fields, a message states: 'Please provide the following detail for the zero contribution'. The 'Type of Leaver' section has three options: 'Left Employment' (selected), 'On Leave', and 'Contributions Ceased Still Employed'. Below this is a 'Leave/Ceased Date' field (DD-MM-YYYY) and a 'Last Salary deduction Before Leave/Ceased' dropdown menu. At the bottom, there is a disclaimer: 'We will process the information you have provided as soon as possible. While most of the information you have submitted will be updated immediately, certain information may need some verification.' and a note: 'Please check request details are correct before submitting. Once you have submitted your request, should you wish to make any further changes you will need to contact your service team.' There are 'Cancel' and 'Submit' buttons at the bottom right.

1. Where all three contribution types are set to zero for a member the user will have three leaver options;

- Left Employment
- On Leave
- Contributions ceased still employed

Once the appropriate option is selected from the "Type of Leaver" drop down menu information relating to "Leave/Cease Date" and "Last Salary Deduction before Leave/Cease" will be required.

In the case of "On Leave" a "Return Date" will also be required to process the update.

This information is mandatory so it is important this is available in order to submit the request.

The screenshot shows the 'Direct Debit Contribution Update' form for a member. At the top, it displays 'Member Reference: 123456789'. Below this, the 'Direct Debit Collection Date' is set to '01/07/2022' and the 'UMR' is '10000000'. The form has three input fields for contributions: 'Employer Contribution' (0), 'Employee Contribution' (0), and 'AVC Contribution' (200.00). The 'Total Contribution' is displayed as '200.00'. Below these fields, a message states: 'Please provide the following detail for the zero contribution'. The 'Type of Leaver' section has three options: 'Left Employment', 'On Leave' (selected), and 'Contributions Ceased Still Employed'. Below this is a 'Leave/Ceased Date' field (DD-MM-YYYY) and a 'Last Salary deduction Before Leave/Ceased' dropdown menu. At the bottom, there is a disclaimer: 'We will process the information you have provided as soon as possible. While most of the information you have submitted will be updated immediately, certain information may need some verification.' and a note: 'Please check request details are correct before submitting. Once you have submitted your request, should you wish to make any further changes you will need to contact your service team.' There are 'Cancel' and 'Submit' buttons at the bottom right.

2. Where both employer & employee contributions are set to zero or where AVC only is set to zero the user will have only two leaver options;

- On Leave
- Contributions ceased still employed

Once the appropriate option is selected from the "Type of Leaver" drop down menu information relating to "Leave/Cease Date" and "Last Salary Deduction before Leave/Cease" will be required.

In the case of "On Leave" a "Return Date" will also be required to process the update - this information is mandatory so it is important this is available in order to submit the request.

# Direct Debit Contribution Update - Leavers and Contribution Breaks


3. Once submitted the member status for the individual member will be updated to reflect the type of leave.

If a member has been updated as “Left Employment” the member status will display as “Deferred”.

If a member has been updated as “On Leave” or “Contributions Ceased still employed” the member status will display as “Active In Skip”.

Where a leaver update has been provided the “Edit” icon will be replaced with an “i” icon advising the user to contact their service team - the option to provide further updates for this member will no longer be available.

Any members that have a leave/cease update will not be included in the bulk upload functionality.





Update to Member Reference [REDACTED] has been submitted. X


**Frascati Holdings Limited**  
Group Number: 60523519




Salary Deduction Month: July 2022   Direct Debit Collection Month: July 2022

Filter table

 User Guide

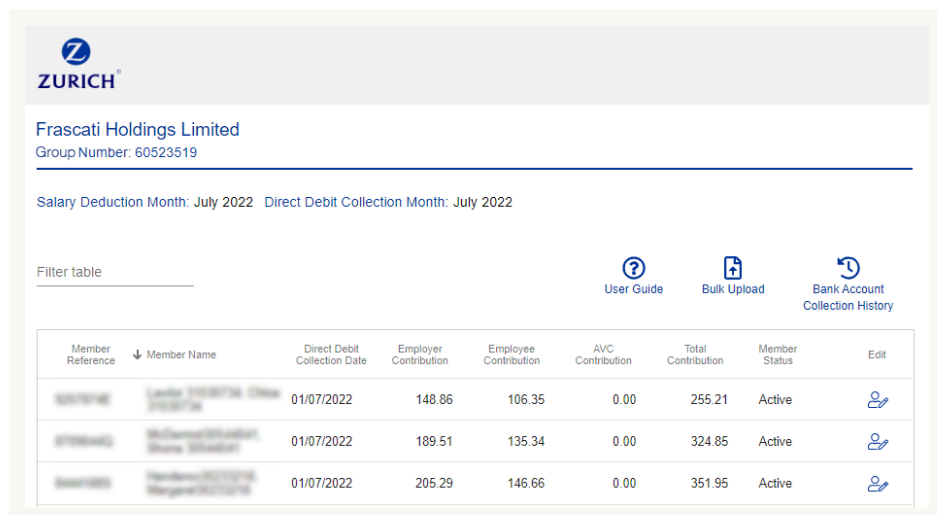
 Bulk Upload

 Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution	Total Contribution ↓	Member Status	Edit
[REDACTED]	[REDACTED]	01/07/2022	2,500.00	2,500.00	0.00	5,000.00	Active	
[REDACTED]	[REDACTED]	01/07/2022	1,000.00	3,000.00	400.00	4,400.00	Active	
[REDACTED]	[REDACTED]	01/07/2022	0.00	0.00	0.00	0.00	Deferred	

# Direct Debit Contribution Update

## - Bulk Upload



**ZURICH**

Frascati Holdings Limited  
Group Number: 60523519

Salary Deduction Month: July 2022 Direct Debit Collection Month: July 2022

Filter table

User Guide Bulk Upload Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution	Total Contribution	Member Status	Edit
1000000001	Leader 1000000001	01/07/2022	148.86	106.35	0.00	255.21	Active	
1000000002	Member 1000000002	01/07/2022	189.51	135.34	0.00	324.85	Active	
1000000003	Member 1000000003	01/07/2022	205.29	146.66	0.00	351.95	Active	

### 1. Beginning the Process

When the “Bulk Update” icon is clicked a side panel will display onscreen.

A warning will be included in the side panel which instructs the user that if any member has no contribution applying this should be updated via the edit facility for that member on the main page. Zero contributions cannot be uploaded via the bulk tool.

### 2. Downloading the Data

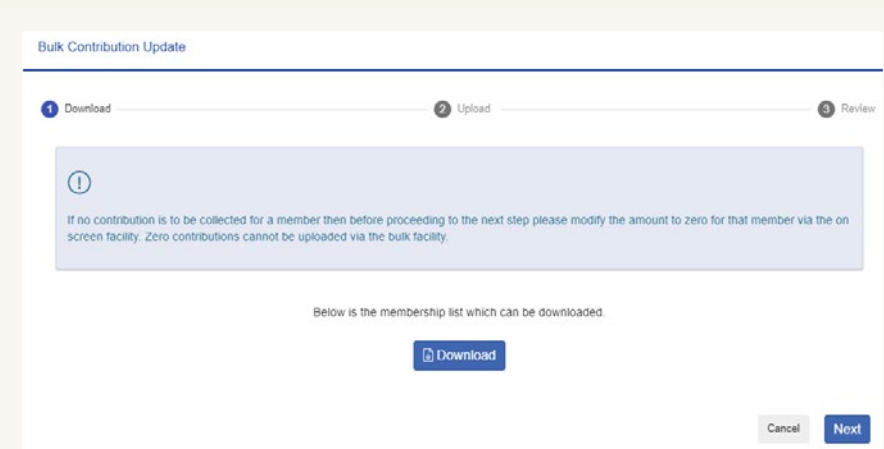
To begin the process you click on the “Download” button, this will generate a copy of the contribution template which will be saved to the user's PC as a CSV Excel file. The file name will be the scheme number and the download date.

The downloaded template should only list active members of the scheme.

All schemes will have access to the “Bulk Update” option.

There is no requirement to use the bulk tool. The user may prefer to update each member individually.

The bulk tool is accessed via the “Bulk Update” icon on the main member page.



Bulk Contribution Update

1 Download 2 Upload 3 Review

ⓘ

If no contribution is to be collected for a member then before proceeding to the next step please modify the amount to zero for that member via the on screen facility. Zero contributions cannot be uploaded via the bulk facility.

Below is the membership list which can be downloaded.

Download

Cancel Next

# Direct Debit Contribution Update - Bulk Upload

## 3. Updating the Template

The first 8 rows of the Excel file are instructions for the user and must not be deleted.

Only “Employer”, “Employee” and “AVC” fields should be altered. No other data should be modified and no members should be added or deleted.

Changes other than the “Employer”, “Employee” and “AVC” fields will cause the file upload to fail.

The Member Reference we have on file and the client’s name are populated on the spreadsheet to help the user identify the member and compare contribution details against their own files.

If the user recognises that a member on the list has left service, the user should delete the file, go back to the Edit screen and update the leaver details for that member as explained previously. When this has been done, that member will no longer appear on the Bulk Update template when it is downloaded again.

If a Member Reference is to be changed, the Employer/advisor should contact their Zurich service team.

## 4. Uploading the file

When the changes to contribution have been made, the user should save the Excel file on their PC to be re-uploaded to the Portal. When “Next” is selected on the “Bulk Update” side panel, the user is brought to the upload stage of the process.

The Excel file to be uploaded must be saved as a CSV file. The file can either be dragged and dropped into the box provided, or the user can search for the file on their PC by selecting Browse Files.

Member Reference	UMR	DD Collection	Surname	First Name	Employer	Employee	AVC
1		01/07/2022	Mr. Smith	John	219.98	260.02	0
2		01/07/2022	Mr. Smith	John	82.26	58.75	0
3		01/07/2022	Mr. Smith	John	182.53	130.4	0
4		01/07/2022	Mr. Smith	John	154.69	110.51	0
5		01/07/2022	Mr. Smith	John	100	100	0
6		01/07/2022	Mr. Smith	John	1000	3000	400
7		01/07/2022	Mr. Smith	John	318.16	227.3	0
8		01/07/2022	Mr. Smith	John	219.98	160.02	0
9		01/07/2022	Mr. Smith	John	205.29	148.66	0
10		01/07/2022	Mr. Smith	John	148.91	106.38	0
11		01/07/2022	Mr. Smith	John	229.96	180.04	0
12		01/07/2022	Mr. Smith	John	144.34	103.13	0
13		01/07/2022	Mr. Smith	John	255.06	187.15	0

Bulk Contribution Update

Download Upload Review

Ensure file format is .csv

Drag and Drop your file here.

or Browse Files

Cancel Back

# Direct Debit Contribution Update - Bulk Upload

## 5. Successful Upload

When the file is selected it will be uploaded automatically.

A review screen will be shown if the upload is successful and no errors have occurred. The user will be able to review the contribution details for each member on the file before submitting the data.

The contribution updates will be validated and warning messages will display if the contribution changes either exceed the current contribution by over 100% or are less than the current contribution by greater than 50% - this will not prevent a successful upload however.

Bulk Contribution Update

Download Upload

**Warning:** 04-04-2022\_bulk\_contribution\_template\_60523519\_invalid.csv is valid but contains 2 warnings. Please review the Warnings column of the table before submitting. The warnings can be as follows:  
**Warning A:** The revised contribution amount exceeds the current contribution by greater than 100%. Please ensure that this is correct before submitting to be processed on this screen, please contact your service team in relation to any such payments.

Filter table

Member Reference	Name	UMR	DD Collection Date	Employer	Employee	AVC
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	219.98	250.02	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	82.28	58.75	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	182.53	130.40	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	154.89	110.51	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	100.00	100.00	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	1,000.00	3,000.00	200.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	318.18	227.30	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	219.98	180.02	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	250.00	250.00	0.00
00000000000000000000	00000000000000000000	00000000000000000000	01/07/2022	148.91	100.38	0.00
Total				12,401.94	12,498.33	425.00

## Unsuccessful Upload

If there is an error in the file, a warning will appear on screen explaining why the file has failed to upload.

The file upload may fail for some of the following reasons;

- Use of a non standard template or non CSV file type
- Deleting instruction text in the first 8 rows
- Invalid or blank contributions
- Removing or adding members
- Changing member reference
- Duplicate member references for different members of the same scheme
- Where maximum increase limit of €5,000 is exceeded

Bulk Contribution Update

Download Upload

Drag and Drop your file here.  
or Browse Files

**Warning:** 04-04-2022\_bulk\_contribution\_template\_60523519\_invalid.csv has failed validation. Please review the Warnings column of the table before submitting.

File Row	Column	Value	Error Description
10	First Name	00000000000000000000	The First Name has been amended. Alternatively you can restart the bulk upload.
10	Surname	00000000000000000000	The Surname has been amended. Alternatively you can restart the bulk upload.
17	AVC	250	Amount input into AVC field where reupload the data.
24	Employer	-250	A non numeric character has been reupload the data.
	Member Reference	00000000000000000000	Duplicate Member Reference.

## 6. Submitting the Changes

Following a valid upload, and once the user has reviewed and is satisfied with the changes, the bulk update may be submitted.

When the user clicks the "Submit" button the contribution updates will be processed automatically on our systems and the Members page will also immediately reflect the new contributions. A message will appear at the top of the screen when the update has been submitted.

**ZURICH**

Bulk Contributions Update has been submitted. X

**Frascati Holdings Limited**  
Group Number: 60523519

Salary Deduction Month: July 2022 Direct Debit Collection Month: July 2022

Filter table

User Guide Bulk Upload Bank Account Collection History

Member Reference	Member Name	Direct Debit Collection Date	Employer Contribution	Employee Contribution	AVC Contribution	Total Contribution	Member Status	Edit
00000000000000000000	00000000000000000000	01/07/2022	250.00	250.00	0.00	500.00	Active	Edit
00000000000000000000	00000000000000000000	01/07/2022	189.51	135.34	0.00	324.85	Active	Edit
00000000000000000000	00000000000000000000	01/07/2022	250.00	250.00	0.00	500.00	Active	Edit

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Intended for distribution within the Republic of Ireland.

GR: 6885 Print Ref: ZL PB 5921 0422

