Zurich Life
Broker Centre

The new Zurich Life Mobile Broker Centre gives Brokers access to policy information on the GO!

Visit **www.zurichlife.ie/mobile** or scan

Registration

Accessing the Mobile Broker Centre is easy!

- Visit **www.zurichlife.ie/mobile** on your smartphone or tablet.
- Click 'login'.
- Sign in using your existing username, password and pin.

If you are not already registered for the Broker Centre you can register now on **www.zurichlife.ie**

Access

- Client Policy Information & Values
- Group Scheme Information
- New Business Pipeline Updates
- Available on iPhone, iPad, BlackBerry, Samsung Galaxy or any smartphone or tablet with internet connection.
- Navigate intuitively in a way that is clear and easy to follow.

Client Policies and Values

Select 'Name Find' to search for a client.

Then choose a client from the list and select 'View Client Details' to view a list of their policies.

Choose a policy to access a policy summary and select 'View Policy Details' to access the policy tabs.

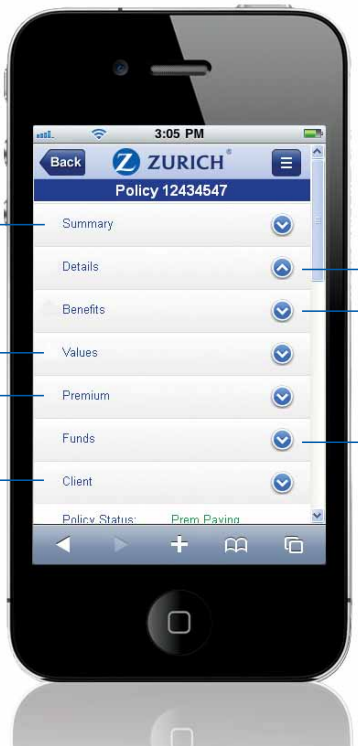
Policy Tabs

The following policy tabs give quick access to a variety of policy details:

Summary
- Policy Status
- Scheme Name
- Scheme Number
- Member
- Category
- Policy Number
- Policy Type
- PDF Summary Access

Details
- Policy Start Date
- Policy Owner
- Tax Exempt Status
- Premium
- Payment
- Frequency
- Paid to Date
- Next Instalment Date
- Retirement Age
- Retirement Date
- Assigned
- Advisor Name
- Advisor Number

Values
- Current Fund Value
- Current Encashment Value
- Maximum Partial Encashment Value
- Valuation Date



Premium
- Regular Premium History
- Single Premium History
- Collection Date
- Total Amount

Benefits
- Policy Status
- Benefit Status
- Life Sum Insured

Client
- Address
- Phone Numbers
- Email Address
- Date of Birth
- PPSN
- Employee Start Date
- Salary

Funds
- Fund Description
- Initial Units/Accumulator Units
- Fund Value

Group Scheme Details

The **'Groups'** button will take you to a list of Group Schemes by agent number.

You can access individual Group Scheme details including:

- Scheme Name
- Scheme Number
- Employer
- Address
- Telephone
- Email
- Category Number

Select by 'Category' and view vesting rules and employer/ employee contribution rates.

From this screen you can select 'View Category Details' or 'View All Categories' to display the relevant list of policies.

Anywhere, anytime on **any** smartphone or tablet.

New Business Pipeline Updates

Selecting **'Pipeline'** gives a list of the agencies for your brokerage. Select any agency to view applications for that agency. Selecting an application gives details on that application under the following tabs.

- Summary
- Details
- Benefits
- Tracking
- Client

Bookmarking

Bookmarking the Mobile Broker Centre allows you to access it quickly and easily without the need to type in the website address every time. The procedure for bookmarking will vary between devices but here are a few common examples:

First visit **www.zurichlife.ie/mobile** on your device, then:

Apple iPhone

- Tap '+' at the bottom of your screen. Then tap 'Add to Home Screen'.

BlackBerry 9300

- Press the 'Menu' button. Scroll down and click 'Add to Home Screen' or 'Add Bookmark'.

Samsung Galaxy S2

- Press 'Menu' and choose 'More'. Then select 'Add shortcut to home'.

Troubleshooting

We have tested the Mobile Broker Centre across a wide range of devices. Given the wide variety of mobile devices available, we may not have specifically tested it using your particular device.

If you are experiencing problems in viewing the website please ensure:

- You have JavaScript enabled;
- You have installed the most up to date operating system on your device.

N.B. - This can result in files and contact information being erased from the device. Owners should ensure all of their files and contact information is backed up before carrying out any software upgrade.

The Mobile Broker Centre is network dependent. A 3G or wi-fi connection is recommended for the optimum browsing experience.

BlackBerry Users

1. Enable JavaScript:

- Press the BlackBerry button (the 7 dots).
- Select Browser and when it has loaded press the BlackBerry button again.
- This will bring up a menu. Select Options.
- Select Browser Configuration.
- Make sure there is a tick beside Support JavaScript.
- Press the back button, if you have made changes you will need to Save.

2. Check OS Version:

BlackBerry users should ensure they have installed a minimum of OS version 5 for the optimum browsing experience.

To check your BlackBerry OS version:

- Press the BlackBerry button (the 7 dots).
- Select Options.
- Select About.
- The OS Version number is on the 3rd or 4th line. It is a series of numbers after a v, e.g. v4.0.0.000.

N.B. - This can result in files and contact information being erased from the device. Owners should ensure all of their files and contact information is backed up before carrying out any software upgrade.

Problems Logging In

If you are experiencing problems when logging in to the Mobile Broker Centre please contact any member of Zurich Life Sales Support Team who will be happy to help.

Quick Menu Button

Need to switch quickly from one section to another? No problem - The **'Quick Menu'** button means there is no need to keep pressing the **'Back'** button to get back to the Home screen. **'Quick Menu'** gives quick access to **'Name Find'**, **'Pipeline'** and **'Groups'** sections of the site from any page.

Smartphones

The 'Quick Menu' button is located at the top right hand side of the screen.

Tablets

The 'Quick Menu' button is permanently displayed on the left-hand side of tablet screens.

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