Ando Gradient Portal

Broker Admin function

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How to access the Broker Admin function

It's our goal to make the Gradient Portal a one-stop-shop for managing all your claims. As part of this, we want to make it as easy as possible for you to manage your own users' access.

As an administrator for your branch, you'll have access to the Broker Admin functions in the portal. This gives you access to add new users, change existing users' roles, deactivate users, and more.

To access the Broker Admin function, click on the blue 'Broker Admin' button in the main navigation menu.

Creating a new user

Creating a new user

Once you're on in the Broker Admin tab, you'll see a few options.

Click the **'Create New User'** button under the 'New User' tab.

Creating a new user

Enter the details of the user in the pop-up dialog box.

Note that all fields marked with a red asterisk are mandatory.

Create New User

* First Name

* Last Name

* Email

you@example.com

Phone

* Broker Role

Broker Administrator

* Home Branch

Pokemon Agency

Next

Creating a new user

If your branch operates with a national structure, your new user will by default, have access to policies held by their own branch. However, you may want to give the new user access to policies held by other branches.

On this screen, you'll see a list of the branches that you, as admin, have rights to assign users to.

To assign additional branches to the new user, simply tick the box next to the branch you want to grant them access to, then click **'Next'**.

Create New User

If you'd like to give Bulbasaur Ash access to policies held by other branches, please select these below:

☐	**Account Name**
☐	Pokemon Agency

Previous   Next

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Creating a new user

Once you've finished creating the user, they will be sent a link to activate their profile via email. You can then manage their access and view their account through the 'Broker Management' tab.

Thank you! The user has been created.

They have been sent an email to activate their account.

Once activated, you can navigate to the Broker Management tab to manage their access

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Changing user role

Change user role

If you'd like to update one of your user's access (i.e. change a Claims Handler to a Broker Admin and vice versa), you can do this by clicking on the **'Change User Role'** button on the 'New User' tab.

Hello Dragonite,

? Get in touch

NEW USER　　BROKER MANAGEMENT

Create New User

Change User Role

Show Feed

ANDO

Change user role

To change a user's role, select the circle next to their name, in this pop-up dialog box.

Then, select the new role you wish to assign to them from this dropdown box.

Grant Users Branch Access

Grant Users Branch Access

If you have multiple branches and would like to give one of your users access to other branches policies, you can do this by clicking **'Grant Users Branch Access'** button on the 'New User' tab.

Hello Eevee,

Home

Get A Quote (Coming Soon)

Make a claim

Broker Admin

Reports

? Get in touch

NEW USER   BROKER MANAGEMENT

Create New User

Change User Role

Grant Users Branch Access

Show Messages

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Grant Users Branch Access

Select the user and click next.

Select the branches the user needs access to, then click next and finish to save the changes.

Please select a broker to receive further policy access.

The broker you select on this screen will receive access to policies held at another branch in your organisation. You are able to select the relevant branch(es) on the next page

Full Name	Email	Branch
⦿ Charizard Ash	✉ ca@gmail.com.invalid	Pokemon Agency
○ Bulbasaur Ash	✉ tim.cragg@gmail.com	Pokemon Agency
○ Eevee Ash	✉ rachel.allsopp@ando.co.nz	Pokemon Agency
○ Dragonite Ash	✉ marc.sepetowski@ando.co.nz.invalid	Pokemon Agency

Select one or more branches whose policies you would like to share with the broker you selected on the previous screen (Charizard Ash):

You can select as many Branches as you like on this screen. If they own policies, then these policies will subsequently be shared with **Charizard Ash.**
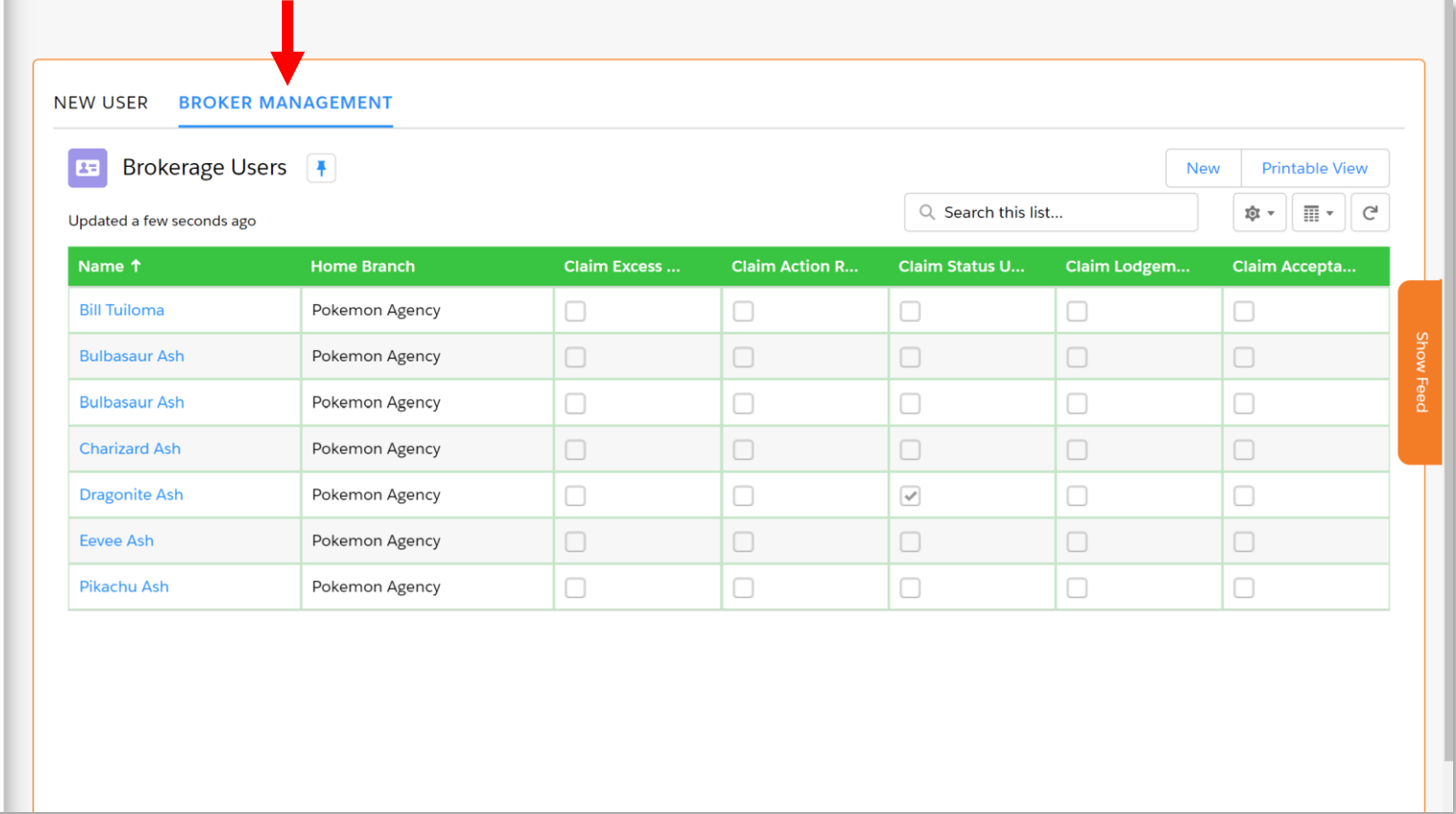
— Branch	⌄
☐ Pokemon Agency	
☑ Ash Ketchum	
☑ Ables Brokerage	

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Broker management

Broker Admin – Broker Management

You can view a list of all the broker users within your branch or branches from the Broker Management tab.
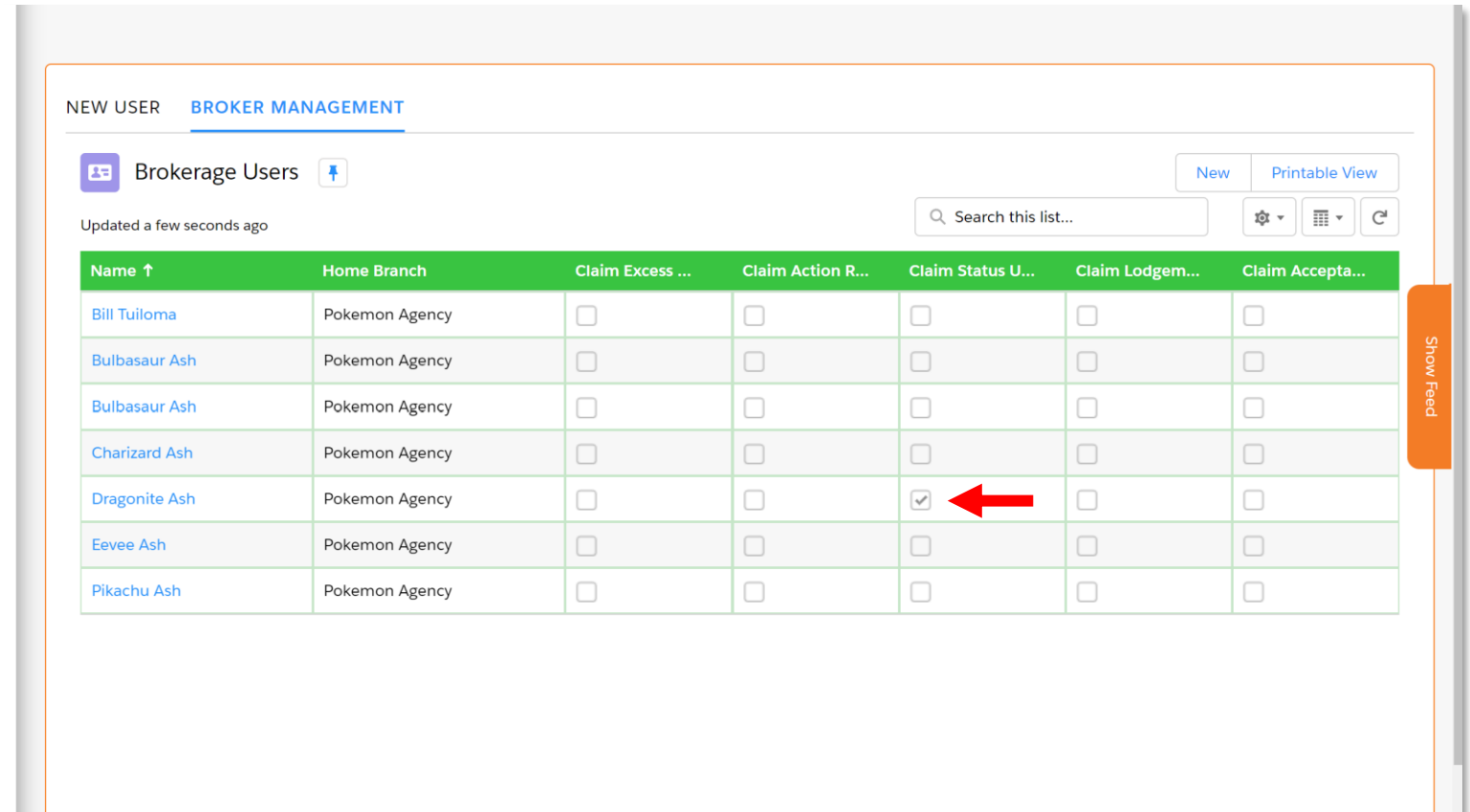
Broker Admin – Broker Management

This tab shows each broker's email notification preferences. Each tick box means an email will be sent when there is a change to the following:

> Claim excess.
> Action required on the claim.
> Status updates on the claim.
> Lodgement updates.
> Acceptance of the claim.

By navigating to each broker's profile, you can also update their email preferences.

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Note: Your brokers are also able to update their own email preferences by navigating to their profile page.

Activating or deactivating a user

Activating or deactivating a user

> To deactivate a user who is no longer active at your branch, or reactivate a user who has previously been deactivated, email brokerportal@ando.co.nz with the user's name and email.