

Ando Gradient Portal

# Broker Admin function

[gradient.ando.co.nz](http://gradient.ando.co.nz)



# Contents

- > How to access the Broker Admin function.
- > How to create a new user.
- > How to change a user's role.
- > The broker management screens.
- > Activating and deactivating users.

# 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.

The screenshot displays the Gradient Portal interface. On the left is a navigation menu with buttons for Home, Get A Quote (Coming Soon), Make a claim, Broker Admin (highlighted with a red box), and Reports. The main content area shows a greeting 'Hello Dragonite,' and a summary 'Active Claims: 75'. Below this are filters for Status (Open Claims) and Assignee (All), and a search bar. A table lists active claims with columns for Action, Claim Number, Account Name, Broker Owner, Risk Description, Broker reference, Acceptance Status, Status, and Created Date. The table contains 15 rows of claim data. At the bottom, there are navigation buttons for Previous, Page 1 out of 3, and Next. The Gradient logo is visible in the bottom left corner of the interface.

Action	Claim Number	Account Name	Broker Owner	Risk Description	Broker reference	Acceptance Status	Status	Created Date
	G-PER-C0131012	Indigo Plateau		Vehicle: Mini Cooper JDR182		In Review (WOP)		25/10/2022, 07:01 am
	G-LLO-C0131077	Cinnebar Island		Marine Commercial Hull		In Review (WOP)	Claim Handler Assigned	2/11/2022, 12:21 pm
	G-LLO-C0130996	Cinnebar Island		Marine Ship Repairers Liability		In Review (WOP)	Submitted	20/10/2022, 05:27 pm
	G-COM-C0131065	Saffron City		Property - 152 Whakakake Street Ta...		Yes	Additional Information Required	31/10/2022, 02:19 pm
	G-COM-C0131070	Saffron City	Eevee Ash	Property - 18 Tilby Drive Matua Bay ...	12435633	In Review (WOP)	Submitted	1/11/2022, 03:19 pm
	G-LLO-C0131021	Cinnebar Island		Marine Carriers Liability	test carriers liability	In Review (WOP)	Claim Handler Assigned	25/10/2022, 07:52 pm
	G-COM-C0131076	Saffron City		Property - 152 Whakakake Street Ta...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 04:43 pm
	G-PER-C0131074	Indigo Plateau		House: 16 Glendale Road		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-PER-C0131075	Indigo Plateau		Contents: 16 Glendale Road		In Review (WOP)	Submitted	1/11/2022, 04:41 pm
	G-COM-C0131073	Saffron City	Bulbasaur Ash	Property - 60 Pavilion Drive Manger...	ASdfbgn	In Review (WOP)	Submitted	1/11/2022, 03:57 pm
	G-COM-C0131072	Saffron City	Bulbasaur Ash	Property - 152 Whakakake Street Ta...		In Review (WOP)	Claim Handler Assigned	1/11/2022, 03:48 pm
	G-PER-C0130950	Indigo Plateau		Contents: 16 Glendale Road		Yes	Claim Handler Assigned	18/10/2022, 02:27 pm
	G-COM-C0131069	Saffron City	Eevee Ash	Property - 18 Tilby Drive Matua Bay ...	12345	In Review (WOP)	Submitted	1/11/2022, 10:39 am
	G-COM-C0131017	Cinnebar Island		Marine Annual Declaration		In Review (WOP)	Submitted	25/10/2022, 04:31 pm
	G-COM-C0131063	Saffron City		Property - 152 Whakakake Street Ta...		In Review (WOP)	Submitted	31/10/2022, 12:58 pm

# 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.

The screenshot displays the ANDO Broker Admin interface. On the left, a vertical sidebar contains navigation buttons: 'Home', 'Get A Quote (Coming Soon)', 'Make a claim', 'Broker Admin' (highlighted with a blue border), and 'Reports'. The main content area is titled 'Hello Eevee,' and features a 'NEW USER' tab (indicated by a red arrow) and a 'BROKER MANAGEMENT' section. Below the 'NEW USER' tab, three blue buttons are visible: 'Create New User' (highlighted with a red border), 'Change User Role', and 'Grant Users Branch Access'. The top right corner includes a 'Get in touch' button and user profile icons. A 'Show Messages' button is located on the right side of the main content area.

# 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

Phone

\* Broker Role

\* Home Branch

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](#)

# 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

Next



# 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.

The screenshot displays a user management interface. At the top left, it says "Hello Dragonite,". In the top right corner, there are three icons: a question mark with "Get in touch", a user profile icon, and a refresh icon. Below the header, there are two tabs: "NEW USER" (which is underlined) and "BROKER MANAGEMENT". A red arrow points to the "NEW USER" tab. In the main content area, there are two blue buttons: "Create New User" and "Change User Role". The "Change User Role" button is highlighted with a red rectangular border. On the right side of the interface, there is a vertical orange button labeled "Show Feed".

# 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.

### Change user role

Please select the broker whose role you would like to change. Below, you can select a new role type to assign them.

Full Name	Email	Home Branch	Role
<input type="radio"/> Bill Tuiloma	✉ bill@pokem...	Pokemon Age...	Claims Handler
<input type="radio"/> Bulbasaur Ash	✉ timothy.crag...	Pokemon Age...	Broker Administrator
<input type="radio"/> Bulbasaur Ash	✉ bulbasaur.a...	Pokemon Age...	Claims Handler
<input type="radio"/> Charizard Ash	✉ ca@gmail.co...	Pokemon Age...	Claims Handler
<input type="radio"/> Eevee Ash	✉ rachel.allso...	Pokemon Age...	Broker Administrator
<input type="radio"/> Pikachu Ash	✉ rachel.allso...	Pokemon Age...	Broker Administrator

\* Please select new role type

Claims Handler

Next

# 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.

The screenshot displays a user management interface. On the left, a sidebar contains navigation buttons: 'Home', 'Get A Quote (Coming Soon)', 'Make a claim', 'Broker Admin', and 'Reports'. The main content area is titled 'Hello Eevee,' and includes a 'NEW USER' tab and a 'BROKER MANAGEMENT' section. A red arrow points to the 'NEW USER' tab. Below the tab, three buttons are visible: 'Create New User', 'Change User Role', and 'Grant Users Branch Access'. The 'Grant Users Branch Access' button is highlighted with a red rectangular border. A vertical 'Show Messages' button is located on the right side of the interface.

# Grant Users Branch Access

Select the user and click next.

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
<input checked="" type="radio"/> Charizard Ash	ca@gmail.com.invalid	Pokemon Agency
<input type="radio"/> Bulbasaur Ash	tim.cragg@gmail.com	Pokemon Agency
<input type="radio"/> Eevee Ash	rachel.allsoop@ando.co.nz	Pokemon Agency
<input type="radio"/> Dragonite Ash	marc.sepetowski@ando.co.nz.invalid	Pokemon Agency

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

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

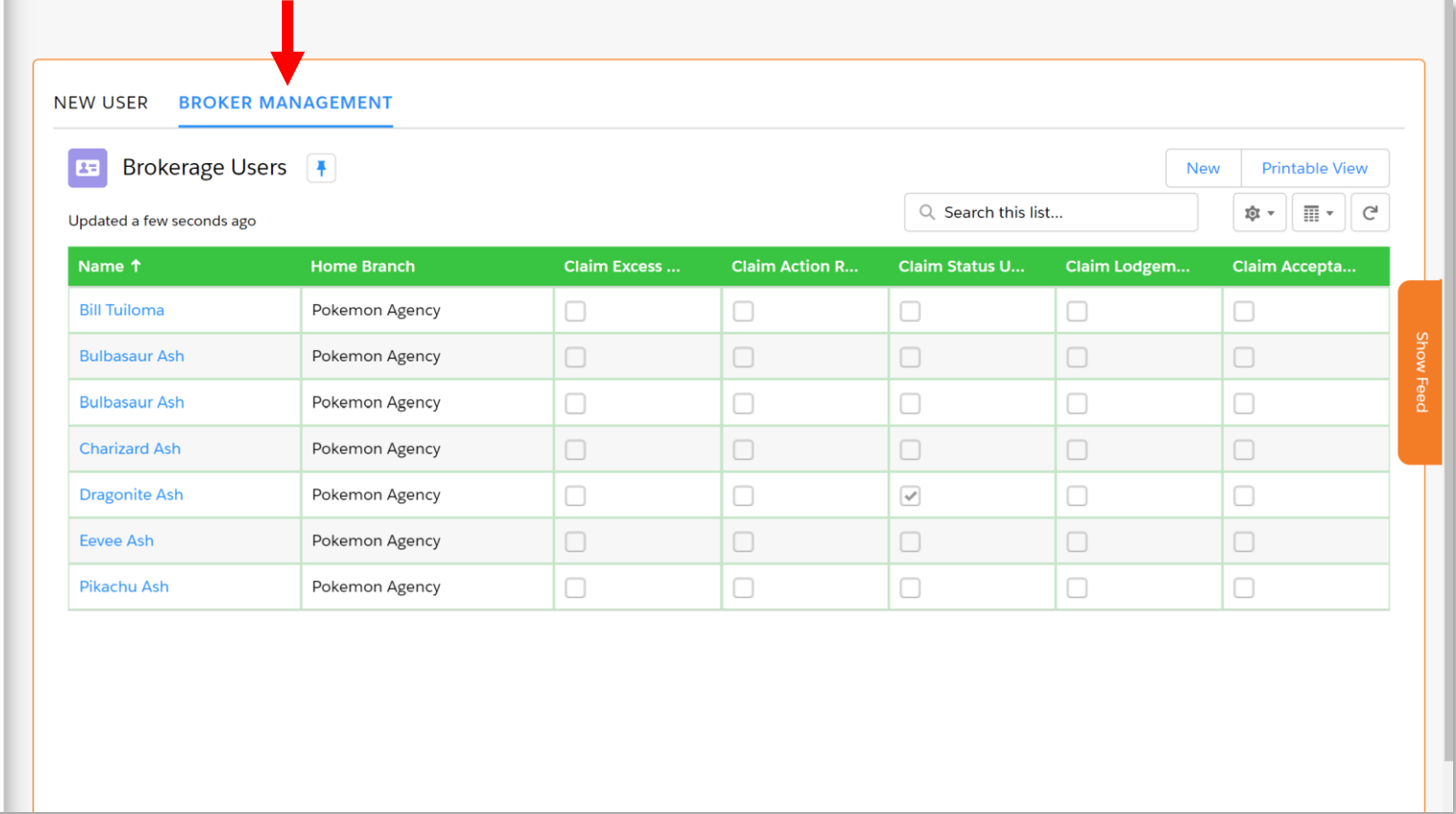
- Pokemon Agency
- Ash Ketchum
- Ables Brokerage

Next

# 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.



The screenshot shows a web interface for 'Broker Management'. At the top, there are tabs for 'NEW USER' and 'BROKER MANAGEMENT', with a red arrow pointing to the latter. Below the tabs, there is a header 'Brokerage Users' with a user icon and a 'New' button. A search bar with the placeholder 'Search this list...' and a 'Printable View' button are also present. The main content is a table with the following columns: Name, Home Branch, Claim Excess, Claim Action R..., Claim Status U..., Claim Lodgem..., and Claim Accepta... The table lists several users, all with 'Pokemon Agency' as their home branch. The 'Dragonite Ash' row has a checked box in the 'Claim Status U...' column. A 'Show Feed' button is visible on the right side of the table.

Name ↑	Home Branch	Claim Excess ...	Claim Action R...	Claim Status U...	Claim Lodgem...	Claim Accepta...
Bill Tuiloma	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulbasaur Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulbasaur Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charizard Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dragonite Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eevee Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pikachu Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



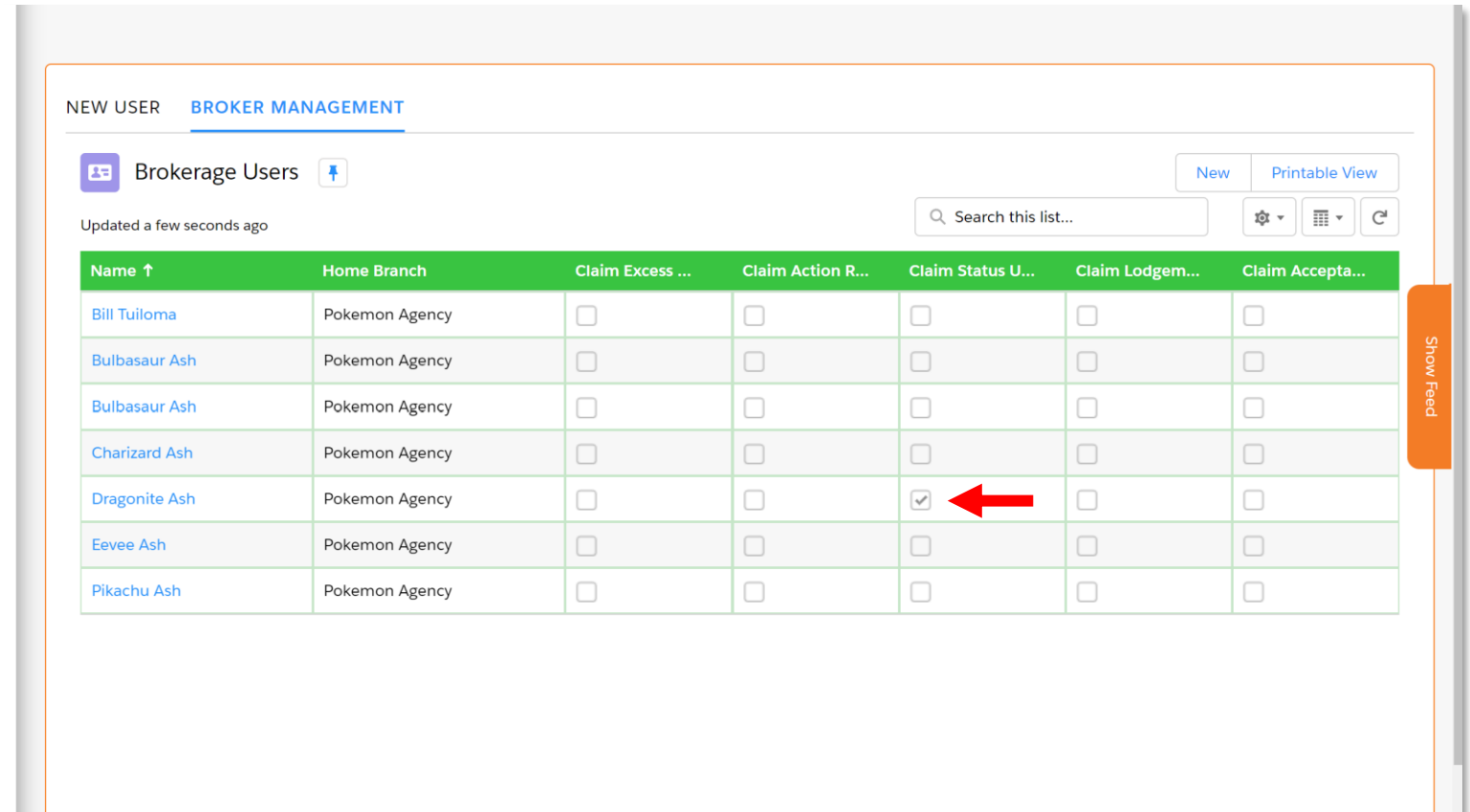
# Broker Admin – Broker Management

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.

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



The screenshot displays the 'BROKER MANAGEMENT' section of a web application. At the top, there are navigation links for 'NEW USER' and 'BROKER MANAGEMENT'. Below this, a header shows 'Brokerage Users' with a search icon and a 'New' button. A search bar contains the text 'Search this list...'. To the right of the search bar are icons for settings, list view, and refresh. Below the search bar, it says 'Updated a few seconds ago'. The main content is a table with the following columns: 'Name ↑', 'Home Branch', 'Claim Excess ...', 'Claim Action R...', 'Claim Status U...', 'Claim Lodgem...', and 'Claim Accepta...'. The table lists seven brokers, all from the 'Pokemon Agency'. The 'Dragonite Ash' row has a checked checkbox in the 'Claim Status U...' column, which is highlighted by a red arrow. On the right side of the table, there is a vertical orange button labeled 'Show Feed'.

Name ↑	Home Branch	Claim Excess ...	Claim Action R...	Claim Status U...	Claim Lodgem...	Claim Accepta...
Bill Tuiloma	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulbasaur Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulbasaur Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charizard Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dragonite Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eevee Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pikachu Ash	Pokemon Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# 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](mailto:brokerportal@ando.co.nz) with the user's name and email.