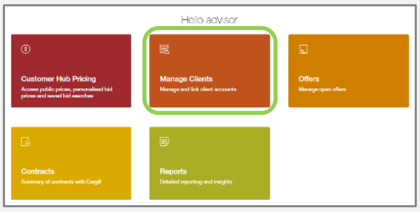
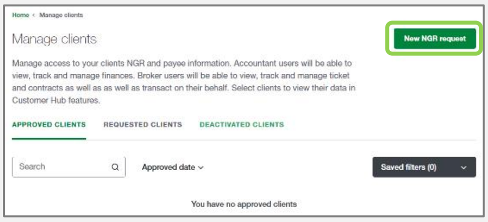
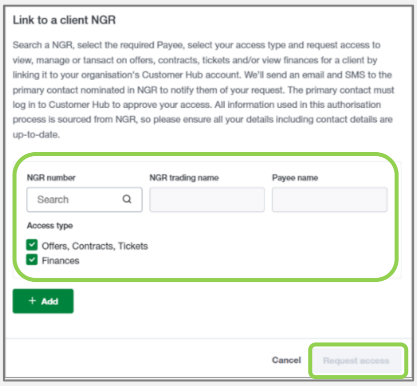
Manage Clients (Advisors)

To access the features and the functionality of the Customer Hub, Advisor Organisations need to link at least one client NGR to their account. Any organisation user can request access to a clients NGR (the client needs to have an active Customer Hub account set up to approve requests) and once linked, all advisor organisation users will have access to the client NGR in the Customer Hub.

1. New Client NGR Request



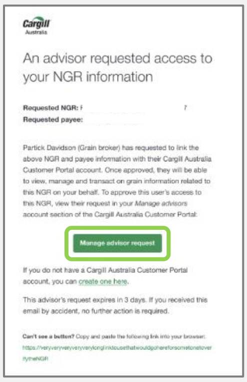


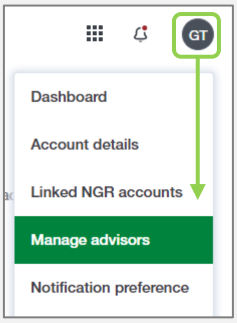


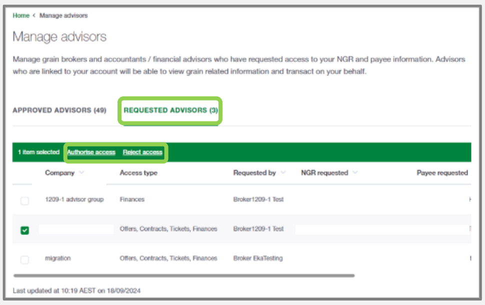
1. On the homepage, select 'Manage Clients'
2. On the 'Manage Clients' page, click 'New NGR Request'.
3. Enter a client NGR and select the required access type (broker, accountant, or both).

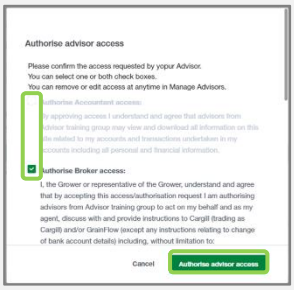
   Request access to additional client NGRs with the '+Add' button and then click 'Request Access'.

2. Client Manage Advisors









1. The request will be sent to **the NGR Primary Contact User.** This user needs create an account with this email address, and log into the Hub to review the request.

2. Open the account menu and select Manage Advisors from the drop-down list

3. In the Requested Advisors tab, check the box next to the Advisor to review and then select an option from the green activity bar; approve access or reject access.

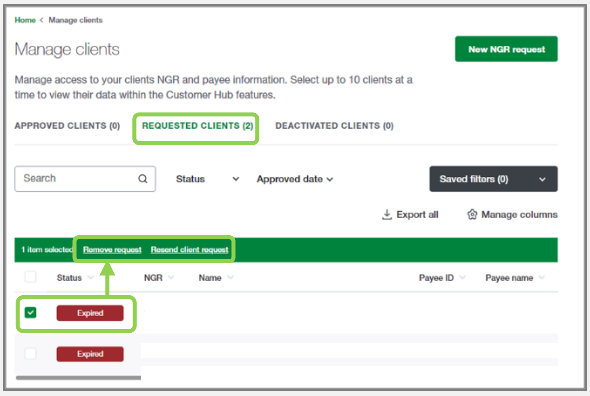
   If approving access, the authorisation form will be displayed.

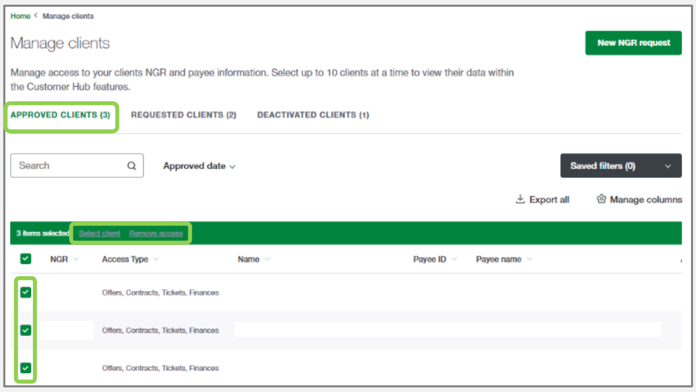
4. Read the terms and conditions and check the boxes next to the access types you want to provide to the advisor, broker, accountant, or both.

   Click authorise access.

Customer Hub
A Cargill Service

3. Advisors Manage Clients





1. Track the NGR request status in the ‘Requested Clients’ tab of Manage Clients.

   Select a client in the table to remove or resend a request. Approved Client NGR access requests will move to the Approved Clients Tab

2. From the Approved Clients Tab you can:

- Select a client in the table and remove their access.
- Select the clients you want to work with in the table, then click ‘Select Client’ in the green activity bar and navigate to the required function.

4. Requested Client Status

"Status"	Status Description	Grower action required	Advisor action required
"Awaiting review"	When NGR and user exist in Customer Hub and request notification successfully sent	Primary User needs to login and approve in "Manage Clients".	Request Primary user to login to Customer Hub and approve access.
"User not found"	When user not found in Customer Hub and request notification successfully sent	Primary User (email address in NGR portal) does not have a Customer Hub account.	Request Primary User to create a Customer Hub Account.
"NGR not found"	When NGR not found in Customer Hub and request notification successfully sent	Primary User has yet to pair to the NGR in Customer Hub.	Request Primary User logs in and pairs with the requested NGR in Customer Hub.
"Expired"	When request has expired	N/A	Resend request. Call Grower and provide context.
"Not sent"	When request notification failed to send	N/A	Resend request or call Cargill Customer Service 1800 447 246