

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

	Hello advisor		Home < Manage clients	Link to a client NGR
•	E	5	Manage clients Manage access to your clients NGR and payee information. Accountant users will be able to	Search a NGR, select the required Payee, select your access type and request access to view, manage or tansact on offers, contracts, tickets and/or view finances for a client by
Customer Hub Pricing Access public prices, personalised bid prices and second bid seconds	Manage Clients Manage welfiek client accounts	Offers Messge open offers	view, track and manage finances. Broken users will be able to view, track and manage toket and contracts as well as as well as transact on their behalt. Select clients to view their data in Customer Hub features.	linking it to your organisation's Customer Hub account. We'll send an email and SMS to the primary contact nominated in NGR to notify them of your request. The primary contact must log in to Customer Hub to approve your access. All information used in this authorisation
ß	Ð		APPROVED CLIENTS DEACTIVATED CLIENTS	process is sourced from NGR, so please ensure all your details including contact details are up-to-date.
Contracts Summery of contracts with Cargil	Reports Detailed reporting and insights		Sourch Q. Approved date ~ Saved filters (0) ~	NGR number NGR trading name Payee name
		·)	You have no approved clients	Access type
				Offers, Contracts, Tickets Finances

- 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).

+ Add

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

2. Client Manage Advisors

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n advisor requested access to		Manage grain brokers and accountants / financial advisors who have requested access to your NGR and payse information. Advisors Authoritse advisor access
our NGR information		who are linked to your account will be able to view grain related information and transact on your behalf. Please confirm the account will be able to view grain related information and transact on your behalf.
guested NGR: F 7 guested payee:	Dashboard	APPROVED ADVISORS (49) [REQUESTED ADVISORS (3)]
tick Davidson (Grain broker) has requested to link the we NGR and payee information with their Cargiil Australia	Account details	then selected by a process based access the select of the process based access the select of the process of of the proces of the process of the process of the proces of the process of t
stomer Portal account. Once approved, they will be able sew, manage and transact on grain information related to		Company V Access type Reguested by V NGR requested V Payee requested I Payee requested I I I I I I I I I I I I I I I I I I I
NGR on your behalf. To approve this user's access to NGR, view their request in your Manage advisors sum section of the Camili Australia Customer Pontat	Linked NGR accounts 💙	12094 tableor group Finances Bolar12004 test + End Finances Bolar12004 test + End Finances Finances Bolar12004 test + End Finances Finance
Manage advisor request	Manage advisors	Oters, Contacts, Tickets, Finances Beletr109+1 lest Capity and/or Charlow (secopt any instructions to Cargit) finading Capity and/or Charlow (secopt any instructions relating to beletrices) Capity and/or Charlow (secopt any instructions relating to beletrices)
do not have a Cargill Australia Customer Portal unt, you can create one here.		ingoston Other, Contracth, Tolette, Frances Broker Ballisting I Cancel Authorites and the Cancel
stvisor's request expires in 3 days. If you received this by accident, no further action is required.	Notification preference	Last updated at 10.19 AEST on 10/092024

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 dropdown 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.



3. Advisors Manage Clients

Home < Manage clients	
Manage clients	New NGR request
Manage access to your clients NGR and payee information. Select up to time to view their data within the Customer Hub features.	o 10 clients at a
APPROVED CLIENTS (0) REQUESTED CLIENTS (2) DEACTIVATED	CLIENTS (0)
Search Q Status ~ Approved date ~	Saved filters (0) v
1 item selected Bemove request Besend client request	
Status V NGR V Name V	Payee ID \vee Payee name \vee
Expired	
Expired	

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

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Manage clie	nts				New NGR request
Manage access to he Customer Hub	your clients NGR and payee features.	information. Select up to 10 c	lients at a time to view their data within	1	
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Search 3 items selected	Q Approved da	te v		Sa ≟ Export ali	wed filters (0)
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Search 3 items selected	Q Approved da det client Remove access Access Type ~ Other, Contracts, Tickets, Finances	te V Name V	Payee ID \sim Payee nar	≗ Export all	ved filters (0)
3 items selected Color NGR V C	Q Approved da	Name ~	Payne ID 🕗 Payne nar	Sa ≟ Export all ne ∨	ved filters (0) →

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