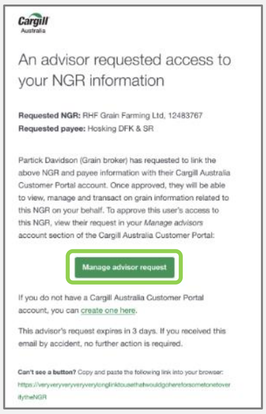
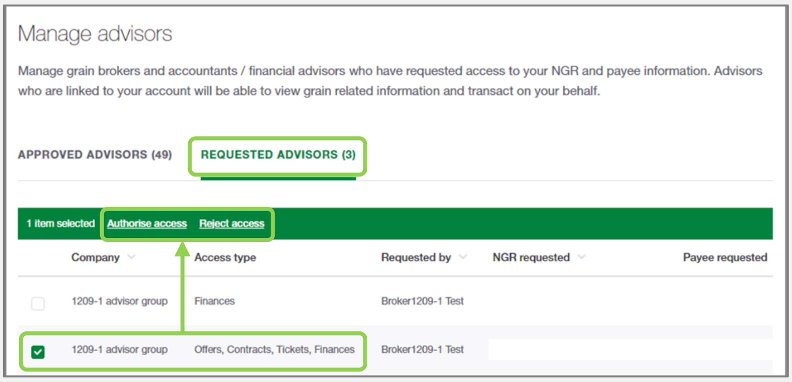
Manage Advisors

Advisors (brokers / accountants) can submit requests to their clients to link NGRs in the Customer Hub. Accountants can see all information in your finance screens, including payment records, invoices, and contract history. Brokers can transact on your behalf, including creating contracts and allocating tickets to contract or cash. They will also have access view your GrainFlow warehoused grain and contracting history.

1. Advisor Requests to link NGRs





1. The NGR Primary Contact will receive an email and SMS when an advisor requests access to your NGR.

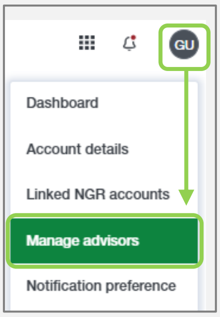
This user must have an active account set up with the same email address as recorded in NGR to approve Advisor requests.

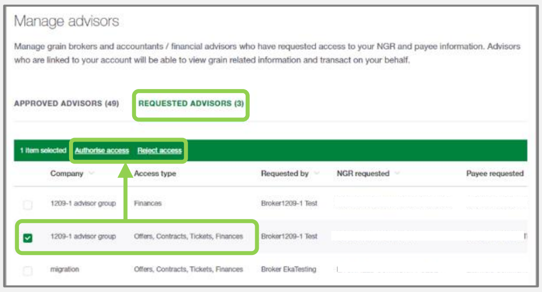
Click ‘Manage Advisor requests’ in the email.

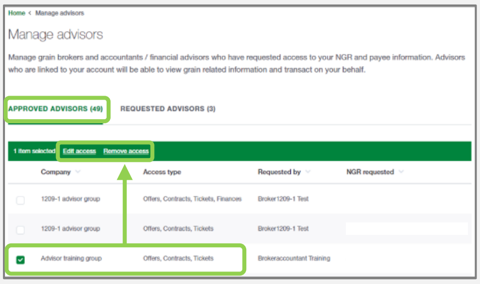
2. Sign into the Customer Hub (or sign up for an account if you don’t have one, there is a link in the email, then open your account menu and select Manage Advisors).

In the requested advisors tab, select an advisor in the table and reject or approve the request by choosing an option in the green activity bar. Requests to link NGRs expire in 72 hours from being sent.

2. Managing Advisors







1. Open your account menu by clicking your initials in the top right corner of the screen and select ‘Manage Advisors’.

2. Review your pending Advisor Requests at any time in the Requested Advisors tab.

From here you can select an advisor in the table and approve or reject their access request in the green activity bar.

3. Review all approved advisors

Remove advisor access by selecting the advisor and clicking ‘Remove Access’ in the green activity bar.

Edit an advisor’s access to change their Access Type if required.