

1. How do I reset my Ando Portal password?

You'll need to contact the Ando support team. You can do this by emailing them by clicking on the link on the login screen.

2. What help functionality is available in the Ando Portal?

Once you've logged in to the Ando Portal, from the Help icon you can view:

- FAQs – answers to some common questions.
- Training guide – a series of videos showing how to complete some key tasks (including creating a new client, creating a quote, buying a quote and referrals).
- Policy wordings – a PDF of the Ando policy wordings for house, contents and vehicle.

3. What are the different sections of the Ando Portal home screen?

The home screen has three sections; these are:

Active Quotes – displays a list of the quotes that are currently underway. They may have all the required information completed or may have been saved with only some of the details completed. No cover is in place as the “Buy Now” option has not yet been selected.

Referrals Approved – displays a list of quotes that were referred to Ando and have been approved. You can now view the quote details, including the premium and can select “Buy Now” to arrange the cover. If you select “Amend” to update the quote details, the quote may require referral to Ando again.

Referrals in Progress – displays a list of quotes that are still in progress. The referral is either:

- still with Ando as they have not yet made a decision (the status will be red)
- pending decision as Ando have requested additional information (the status will be green)
- declined due to underwriting reasons (the status will be green)

Please note that quotes with a red status cannot be edited by the Broker.

4. I'm about to do a new quote and I don't know if the customer already exists in the Ando Portal. What should I do?

It's always a good idea to select “Search Client” from the Search menu option at the top right of the screen. Enter the client name and select “Search”. If they have already been set up in the Ando Portal their details will be returned. If no results are returned you can select either “Create Organisation” (for Family Trusts) or “Create Person”.

5. I want to be able to capture more than one address for the customer. Can I do this?

Yes, you can add multiple addresses for a customer. You should always create the “Correspondence Address” as your business address. This is the address that will print on all documents. You can then select a different address type, enter the details and select “Add”.

6. I've entered the street address for the house and now I can't change some of the house details fields. What do I do if I need to change these details?

Once the address is entered the Ando Portal automatically fills in the fields with data it can obtain about the house. If you need to change some data (for example if the house has recently had an extension added on) you can select “Amend”. This will then allow you to update all the fields.

7. What happens when I select the “House Calculator” button and why should I do this?

This button will automatically provide you with the estimated reconstruction cost of the house, as calculated by Cordell Sum Sure. You'll need to select you 'agree' to the terms and conditions before the system will provide the reconstruction cost. You should then copy the total value into the “Estimated Sum Insured” field in the Ando Portal. If you want to insure the home for a different value you can update the “Requested Sum Insured” field. This is the most reliable way of making sure your customer has the correct amount of cover for their house.

8. When I'm creating a house quote why do I need to enter a value for carpets sum insured?

The Ando House cover provides cover for carpets. The value of these is not included in the estimated sum insured, which is provided when “House Calculator” is selected. To ensure your customer is not under-insured in the event of a total loss from natural disaster, you should enter a value for the carpets. The Total Sum Insured for the house will then update to include this value. If the sum insured provided by your client is already adequate enough to cover carpets or there are no carpets in the house as, for example, it has wooden or concrete floors throughout then enter \$0.

9. When I'm creating a contents quote I have entered a specified item, but the value of the item has not been added to the Total Sum Insured.

You'll need to select the “Add” button so the item is added to the sum insured and successfully specified on the policy. Once the item has been added you'll have the option to “Delete” or “Amend” the item and you are also able to add further specified items.

10. Why do some fields have a red asterisk beside them?

This indicates the field is a required field and must be completed before you're able to get a quote and arrange the cover. If these are not completed you will see an error message at the bottom of the screen you're on and the field required will have a red border.

11. What does the “Registration Search” button do and why should I use it?

If you know the registration number of the vehicle, you can select this button and most of the vehicle details will automatically get completed. This saves you entering these details manually and makes sure you have the correct details for the vehicle. It then provides a list of model variants for you to select. Once selected, the sum insured for the vehicle is provided. This can be changed by either entering a new value or using the slider to select the required value.

12. I don't know the vehicle's registration number, what do I need to do?

You'll need to enter the vehicle details manually. When entering the make and model, you must select one of the values displayed (and not type it in manually). Then select the “Vehicle Valuation” button which provides a list of model variants for you to select. Once selected, the sum insured for the vehicle is provided. You can then continue completing the vehicle quote as usual.

13. I want to insure the vehicle for a value that is outside the values shown in the Sum Insured slider. How do I do this?

The Ando vehicle policy provides an agreed value cover, so Ando validates the sum insured against vehicle valuation data. If you wish to insure the vehicle outside the range of values the Ando Portal will generate a referral to Ando. You will need to provide the rationale for the variation in value, for example, it has exceptionally low kilometres, or the client got a good deal from someone selling the vehicle when they were leaving the country.

14. If the main driver is under 25 do I also need to add them as an under 25 listed driver?

No, if the main driver is aged under 25 you do not need to re-enter their details in the “Any under 25 year old listed drivers?” section. You will need to enter the details of any other under 25 year old drivers that you want to list on the policy.

15. I've searched for a quote I created earlier and have gone into that quote as I want to update some of the fields but am unable to make any changes. Why is this?

When you search for an existing quote and select the quote you want to look at, you have the option to “View” or “Amend”. If you select “View”, that quote is read only so you cannot change any of the data. You need to select the “Amend” option to be able to make changes.

16. Why does the premium shown on the quote summary for each risk differ from the total premium shown in the quote summary section?

The premiums, shown on the quote summary under the “Risks” section, are GST exclusive, while the premium shown in the yellow quote summary section is the total for all risks and is GST inclusive.

17. Why do I have to re-enter the situation risk address for every risk when they are the same?

At the moment, it is necessary to re-enter the situation of risk address for each risk. We are looking to make a future enhancement to copy the address and some other fields, such as “Is the house alarmed?” across multiple risks in a quote. We’ll let you know when that enhancement is available.

18. Why is my risk not shown on the quote document?

The quote document will include all risks that have a status of quoted. If a risk has a status of unquoted or referred it will not get included in your quote document.

19. Can I use the browser ‘back’ button?

While it is possible to select the back button, if you made some changes to the screen you are on these will not be saved.

Need help?

Email pl@ando.co.nz

