



THE CONTROL CENTER FOR THE ENTIRE OPERATION

The Administration side of the CRM gives authorized management users centralized control over the complete service-contract operation, from employee access and plan setup through contract fulfillment, customer servicing, compliance and external administrator relationships.

Company and user management. Admins can create and manage employee accounts, assign roles and permissions, reset passwords, deactivate or reactivate users, and preserve an employee's historical activity after access is removed. The system also supports company-specific configuration so separate operations can be kept isolated within the same platform.

Role and permission control. Different employees can be given different levels of access rather than everyone seeing the entire CRM. Administration includes dedicated permission controls as well as company, employee and sales-role management.

Plan and product administration. Management can maintain the plans available for sale, control which plans are active, manage pricing and terms, and connect seller-facing products to the appropriate outside administrator and funding relationship. The platform includes separate areas for Plan Administrators, Funding Partners, Plan Routing, Plan Mapping and administrator product data.

External plan-administrator management. Admins can maintain each outside TPA/plan administrator's legal name, delivery method, submission email, export format, batch preference, portal information and document-delivery requirements.

Administrator plan catalogs. Outside administrator pricing can be imported and stored separately from the retail products sold by your reps. The administrator catalog can

retain plan codes, names, terms, administrator cost, retail guidance, deductibles and effective dates.

Plan routing and mapping. Admins can decide which administrator and, if applicable, which funding partner should receive each CRM plan. The mapping layer then connects that seller-facing product to the exact administrator product and financial program.

That means a rep may simply sell Premium 3 Year, while the Admin side knows that contract actually corresponds to a specific administrator code, document set, administrator cost and funding arrangement.

Administrator document management. The CRM maintains an administrator-specific PDF/document library where policy booklets, declarations, add-on documents and related files can be stored with versions, effective dates and statuses.

Funding and reserve management. Admins can maintain negotiated funding terms such as funding percentage, reserve percentage, holdback, fees, minimum deposits and the basis used for funding calculations. Those terms can also be effective-dated so older deals preserve the commercial rules that were in place when they were sold.

Contract fulfillment and distribution. Once deals are SOLD, Administration can organize them by destination, review them before release, generate administrator fulfillment batches, download the batch as CSV and send it to the administrator. Sent batches remain available as permanent history.

This allows management to verify exactly what was sent, where it was sent, when it was sent and which contracts were included.

Customer and policy oversight. Admin users can access completed customer and policy files, view customer contact information, policy numbers, plans, sale dates, payment information, notes and policy history. Internal notes are shared between the customer record and the SOLD sale record so departments operate from one customer history.

Customer corrections and data repair. Administration includes historical import and repair utilities for customer data. For example, the CRM has tools for repairing phone/address data and importing historical information without changing unrelated payment, commission or sale information.

Merchant-account management. Admins can maintain the merchant-account records used by the sales operation, activate or deactivate accounts and keep account

identifiers associated with the appropriate CRM configuration. Sensitive gateway credentials remain outside the normal database configuration.

Payment oversight. Management has additional authority over payment activity that sales reps do not have, including the ability to manage payment-related exceptions and unlock a transaction after the CRM's decline safeguards have stopped further sales-rep attempts.

Payroll and commission administration. The CRM can calculate commission from SOLD deals, track opener and closer credit, apply the configured commission rules, exclude canceled contracts from projected payroll, show upcoming payroll periods and provide detailed commission audit exports.

Admins can also control the payroll schedule, including payday, hold period and sales window.

Management reporting. Reports can include customer name, phone, email, address, policy number, plan, payment information, sales attribution, tags and applicable cancellation/accounting data, with CSV export capability.

Claims and service-request administration. The CRM includes customer service-request intake, an internal claims workspace, customer claim history and administrator-managed plan/component screening.

This is also the foundation we are expanding into the full external TPA claims workflow.

Call recordings and compliance. On the version we're working on now, SOLD-call recordings can be automatically pulled from VICIdial and attached privately to the corresponding customer/policy file. Admins can listen to the recording when needed and then choose to create a transcript and run the compliance analysis only when there is a complaint, dispute or quality issue.

This keeps the original sales evidence available without automatically paying to process every single call.

Compliance management. Admin management can review problem calls, transcripts and AI compliance findings and use those records when addressing complaints, coaching representatives or documenting corrective action.

External TPA user management. With the new TPA platform we're building, internal Admins can create the initial external TPA account and assign that user to the appropriate Plan Administrator. External TPA accounts are isolated from normal seller

CRM data and only receive access to the contracts and claims routed to their administrator.

Security monitoring. The CRM contains a Security Audit area that records protected sign-ins and sensitive administrative actions, including the actor, action, affected record and time.

It also includes application/database health monitoring so management has visibility into whether the platform and database are functioning properly.

In simpler terms

The Sales side is designed to help the rep sell the contract correctly.

The Admin side is designed to control everything that happens around and after that sale:

Employees → Plans → Pricing → Payments → Administrators → Funding → Contracts → Fulfillment → Customers → Claims → Recordings → Compliance → Payroll → Reports → Security

And with the TPA functionality we're adding now, it also becomes the management layer connecting:

Seller → CRM → Third-Party Administrator → Funding Partner → Contractor → Customer