



SELL MORE WITH ONE PLATFORM - LET ORBIT BE THE CENTER OF YOUR BUSINESS

1. Lead and customer intake

Sales representatives can create and work a customer directly inside the CRM and move that customer through a guided sale instead of entering information into several disconnected systems.

The CRM stores the customer's name, telephone number, email when available, service address, and associated sale information. Customer names and addresses are automatically cleaned and standardized so records remain professional and consistent. The system can also verify addresses through USPS and, for home sales, use the verified address to retrieve available property information such as year built and square footage.

A customer does not have to be recreated for every purchase. Existing customers can have additional policies added to the same account, with all policies, notes, and customer information maintained under one customer record.

2. Guided sales workflow

The seller does not simply enter a contract after the fact. The CRM actually guides the representative through the sale in stages.

The workflow moves through customer information, product selection, product/property or vehicle details, plan and quote selection, payment setup, the required closing process, and final SOLD status. Completed steps remain accessible without disrupting the current stage of the sale.

Home and vehicle sales can follow different workflows while remaining inside the same CRM.

3. Home-service-contract sales

For a home sale, the representative can select from the plans that have been authorized for that rep or sales group, select the appropriate coverage term, and add optional coverage items.

Add-ons are calculated into the contract total automatically, so the representative can see the base plan price, selected additional coverage, and total contract amount before completing the sale.

The CRM keeps the coverage term and payment term separate, which allows a contract to have one coverage duration while the customer's payment schedule follows the actual approved billing arrangement.

4. Vehicle-service-contract sales

The same platform supports vehicle contracts. Vehicle information can be captured and the VIN can be validated before continuing.

The CRM can present eligible vehicle plans and pricing, accept a contract price and deposit, calculate the remaining balance and monthly amount, and enforce configured minimum and maximum selling prices so a rep cannot accidentally sell outside the permitted pricing range.

5. Multiple payment structures

The CRM supports different ways of completing the sale rather than forcing every contract through the same billing method.

A home plan can be configured as paid in full, monthly installments, month-to-month where permitted, or third-party financing such as Affirm for sales groups that are authorized to offer it. The CRM calculates the relevant deposit, remaining balance, payment schedule, and contract totals.

It also supports post-dated sales, allowing a customer-authorized deposit to be scheduled for a later date instead of being processed immediately.

6. Integrated payment processing and payment controls

NMI payment processing is integrated directly into the sales flow. Card information is securely tokenized rather than storing full card numbers or CVVs inside the CRM.

The representative cannot simply run a charge whenever they want. Payment controls are tied to the sale stage, merchant account, closing requirements, and user

permissions.

The CRM also counts actual processor declines. After three genuine NMI declines, further attempts can be locked until a manager or administrator authorizes another attempt. System errors or network problems do not incorrectly count as customer declines.

There is also a controlled manual-payment fallback for a transaction that was successfully completed directly in NMI, allowing the transaction reference and masked payment information to be recorded and the contract properly marked SOLD.

7. Built-in sales compliance before payment

One of the stronger seller-side features is that compliance is incorporated into the actual sale rather than handled only after a complaint.

Before the payment controls become available, the representative is presented with the required closing script and must confirm that it was reviewed with the customer. Payment remains locked until that acknowledgment is made.

That gives management a much stronger compliance structure than simply handing representatives a script and hoping they use it.

8. Sales-representative attribution

Each sale can identify the opener and closer, allowing the organization to track who originated the sale and who completed it.

That information follows the deal into reporting and payroll instead of having to be reconstructed later.

The CRM's commission system can calculate commission from the sale data, distinguish standard and Affirm compensation rules, prevent double commission where the same employee both opens and closes the deal, show upcoming payable deals, remove canceled deals from projected payroll, maintain historical periods, and export commission audit detail.

9. Automatic contract and policy fulfillment

Once a qualifying home sale becomes SOLD, the CRM can generate a personalized contract PDF from the correct policy template.

The generated policy can incorporate the customer information, policy number, service address, selected plan, coverage term, add-ons, payment information, applicable dates, and required disclosures.

The policy generator also calculates the required effective and expiration dates rather than relying on the representative to calculate them manually. The same policy-generation engine is used for CRM previews/downloads, welcome-email attachments, and customer-portal downloads.

This is a significant fulfillment function because the seller can go from completed payment to issued personalized contract without manually building a PDF for every sale.

10. Welcome and customer delivery

For customers with an appropriate email address, the CRM can send the welcome communication and personalized policy.

The customer can also be given access to a branded customer portal where they can see their contract number, customer information, coverage, plan information, deposit, remaining balance, recurring billing status, policy documents, and service-request functionality.

Multiple policies belonging to the same customer can appear under the same portal account.

11. Complete customer file after the sale

A SOLD transaction turns into a structured customer/policy record rather than disappearing into a sales spreadsheet.

The completed-sale file maintains the customer contact information, verified address status, policy number, sale date, plan/payment information and associated policy information.

Employees can maintain internal customer notes. Those notes are shared between the customer record and the SOLD sales file, so departments do not end up keeping separate histories of the same customer. The CRM maintains author, time, edit status, note count, and customer tags.

There is also a unified customer activity history so the seller has a continuing record of what has occurred on the account.

12. Call recording retention and complaint investigation

The CRM is now integrated with VICIdial.

For a deal that is SOLD in the CRM, the system can locate the matching call recording, download it into private CRM storage, and associate that recording with the appropriate customer and

sale. The underlying integration retains information such as the VICIdial lead, representative, call time, duration, and recording identifier.

In the current version we've intentionally changed the processing model from the original automatic-transcription design: the recording is stored first and left alone.

Only administrators can access the stored sales recording. If a customer complains, a chargeback occurs, an attorney or regulator asks about a sale, or management wants to investigate a rep, the administrator can then choose to create a transcript and run the AI compliance analysis.

That means the seller can maintain the original sales-call evidence without paying to transcribe and analyze every call.

13. Compliance and quality-assurance review

When a call actually needs investigation, the CRM can take the stored audio, create a transcript, and analyze the call against the company's compliance standards.

That turns a customer complaint from a manual process of locating an MP3, listening to an entire 30- or 40-minute call, and taking notes into a review that can identify what was said and flag potentially problematic statements.

The compliance workflow we've designed also supports creating a simplified corrective/compliance acknowledgment for a specific sales representative and maintaining signed compliance records.

14. Customer service and service-request management

The customer portal includes guided service-request intake, while the internal CRM includes claims/service-request management, customer history, and plan/component screening.

That means the seller's relationship with the customer does not end at the payment screen. Customer service staff can continue working the account inside the same environment used during the original sale.

15. Management reporting and data exports

Management can report on the business using the information already collected during the sales process.

Reports can include customer contact information, address, policy, plan, payment details, sales attribution, tags, cancellation/accounting information and other deal data, and can be exported to CSV.

This avoids rebuilding reports by combining sales sheets, processor exports and customer-service records manually.

16. Administrator control over the seller operation

The seller can administer the CRM itself rather than requiring a developer for ordinary business changes.

Administrators can create and deactivate employees, assign roles, control access, manage sales roles, tags and dispositions, configure merchant accounts, manage plans, set payroll rules, perform historical imports, work with recurring-payment imports, use repair/import utilities, configure claims coverage and access security functions.

Merchant credentials themselves are kept outside the ordinary CRM database in protected environment configuration rather than exposing gateway passwords to users.