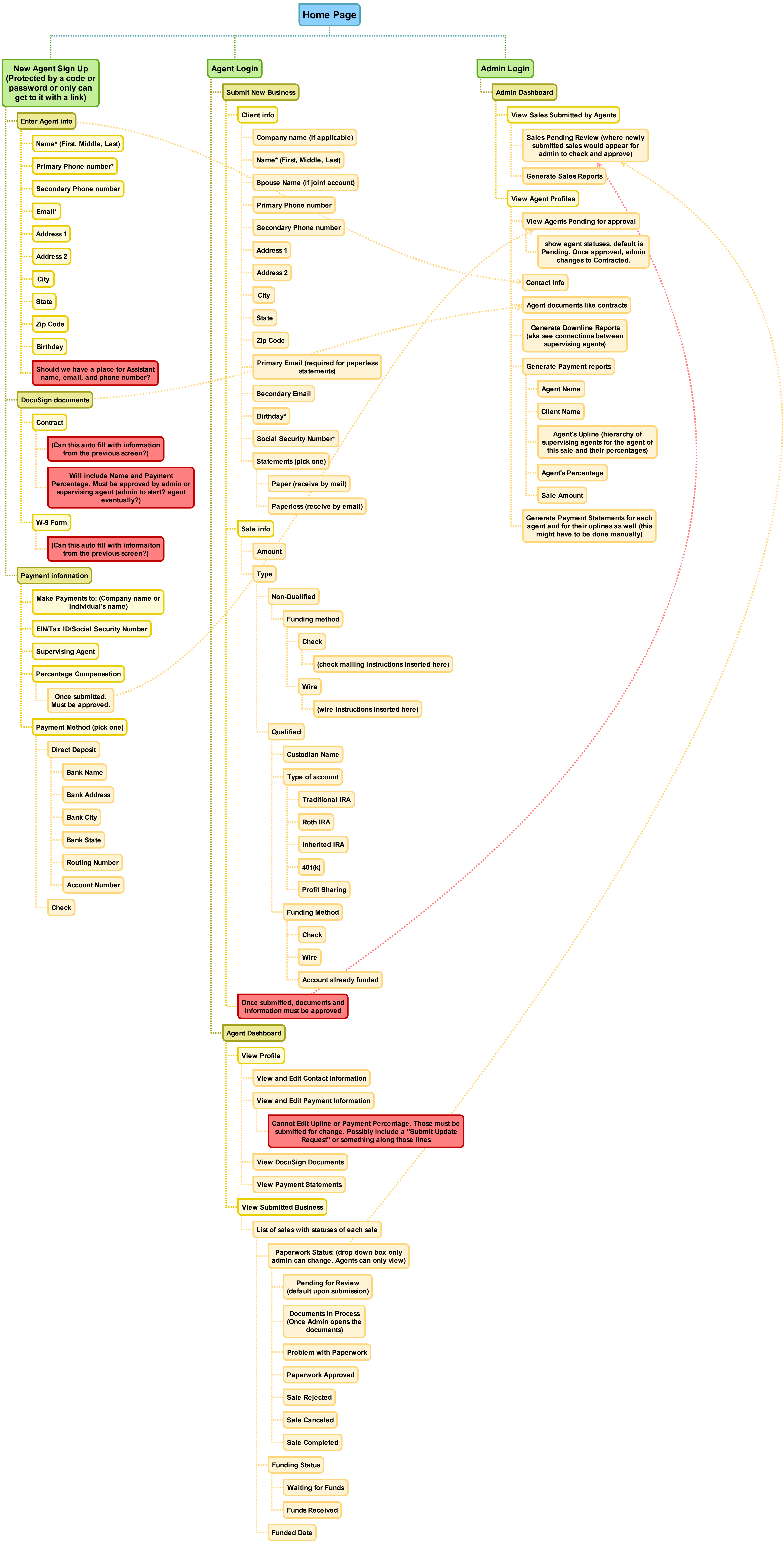

Home Page
New Agent Sign Up (Protected by a code or password or only can get to it with a link)
Enter Agent info
Name* (First, Middle, Last)
Primary Phone number*
Secondary Phone number
Email*
Address 1
Address 2
City
State
Zip Code
Birthday
Should we have a place for Assistant name, email, and phone number?
DocuSign documents
Contract
(Can this auto fill with information from the previous screen?)
Will include Name and Payment Percentage. Must be approved by admin or supervising agent (admin to start? agent eventually?)
W-9 Form
(Can this auto fill with informaiton from the previous screen?)
Payment information
Make Payments to: (Company name or Individual's name)
EIN/Tax ID/Social Security Number
Supervising Agent
Percentage Compensation
Once submitted. Must be approved.
Payment Method (pick one)
Direct Deposit
Bank Name
Bank Address
Bank City
Bank State
Routing Number
Account Number
Check
Agent Login
Submit New Business
Client info
Company name (if applicable)
Name* (First, Middle, Last)
Spouse Name (if joint account)
Primary Phone number
Secondary Phone number
Address 1
Address 2
City
State
Zip Code
Primary Email (required for paperless statements)
Secondary Email
Birthday*
Social Security Number*
Statements (pick one)
Paper (receive by mail)
Paperless (receive by email)
Sale info
Amount
Type
Non-Qualified
Funding method
Check
(check mailing Instructions inserted here)
Wire
(wire instructions inserted here)
Qualified
Custodian Name
Type of account
Traditional IRA
Roth IRA
Inherited IRA
401(k)
Profit Sharing
Funding Method
Check
Wire
Account already funded
Once submitted, documents and information must be approved
Agent Dashboard
View Profile
View and Edit Contact Information
View and Edit Payment Information
Cannot Edit Upline or Payment Percentage. Those must be submitted for change. Possibly include a "Submit Update Request" or something along those lines
View DocuSign Documents
View Payment Statements
View Submitted Business
List of sales with statuses of each sale
Paperwork Status: (drop down box only admin can change. Agents can only view)
Pending for Review (default upon submission)
Documents in Process (Once Admin opens the documents)
Problem with Paperwork
Paperwork Approved
Sale Rejected
Sale Canceled
Sale Completed
Funding Status
Waiting for Funds
Funds Received
Funded Date
Admin Login
Admin Dashboard
View Sales Submitted by Agents
Sales Pending Review (where newly submitted sales would appear for admin to check and approve)
Generate Sales Reports
View Agent Profiles
View Agents Pending for approval
show agent statuses. default is Pending. Once approved, admin changes to Contracted.
Contact Info
Agent documents like contracts
Generate Downline Reports (aka see connections between supervising agents)
Generate Payment reports
Agent Name
Client Name
Agent's Upline (hierarchy of supervising agents for the agent of this sale and their percentages)
Agent's Percentage
Sale Amount
Generate Payment Statements for each agent and for their uplines as well (this might have to be done manually)