CRM-AMS

User Guide

LEGACY℠

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Welcome to the Legacy CRM-AMS User Guide

The Legacy CRM-AMS platform is designed to streamline every aspect of your life insurance business — from lead generation to client management, policy oversight, carrier coordination, reporting, and agency operations. Whether you are an Agent, Agency, Admin Staff member, or a System Administrator, this guide will help you understand how to use the platform efficiently and confidently.

This training guide walks you through each major screen and workflow in the same order you'll experience inside the app. You'll learn:

- How to navigate the system quickly
- How to manage leads, clients, and policies
- How to stay organized with tasks and reminders
- How to understand and use dashboards
- How to track birthdays, reviews, and key dates
- How to access agent tools, agency tools, and admin-only functions
- How to use integrated reporting and performance tracking
- Best practices for daily use

Our goal is to help you get up and running smoothly, eliminate complexity, and maximize your productivity inside Legacy CRM-AMS.

Let's get started.

1. Using This Guide

This guide is designed to help you navigate the Legacy CRM-AMS platform using clear explanations, screenshots, and step-by-step instructions. Each section follows the same order as the screen navigation inside the app, so you can easily follow along or jump to the area you need.

You will see three types of information throughout this guide:

▪ **Screen Overviews**

A high-level explanation of what each screen is for and how agents use it daily.

▪ **Field-by-Field Breakdown**

Descriptions of key fields or inputs you'll encounter and what information goes where.

▪ **Workflows & Best Practices**

Simple, efficient ways to enter leads, update clients, track policies, and stay ahead of your tasks and important dates.

The purpose of this guide is to help you become comfortable and efficient with the CRM so you can spend less time navigating screens and more time helping clients.

How This Guide Is Structured

The layout of the training manual mirrors the layout of the app:

1. Dashboard
2. Leads
3. Clients
4. Policies
5. Tasks
6. Calendar
7. Carriers
8. Files & Uploads
9. Agent Tools
10. Troubleshooting
11. Glossary

Screens you see most often come first, and deeper features follow.

What You'll Need

To follow along with this guide, you'll need:

- Access to your Legacy CRM-AMS account
- Your username and password
- A desktop, laptop, or mobile device with the Power Apps app installed
- Basic familiarity with life insurance clients and policies

Where to Begin

If you're brand new to the system, start with the **Dashboard**.
From there, you can explore leads, clients, policies, and tasks—each section walks you through the typical daily agent workflow.

If you're already familiar with the system, use this guide as a reference book to quickly look up screens, workflows, and definitions.

2. Dashboard

The Dashboard is the first screen you see after logging into Legacy CRM-AMS. It gives you a fast, at-a-glance summary of your business activity, performance, and upcoming responsibilities. The Dashboard contains three tabs:

- **Overview**
- **Tasks**
- **Important Dates**

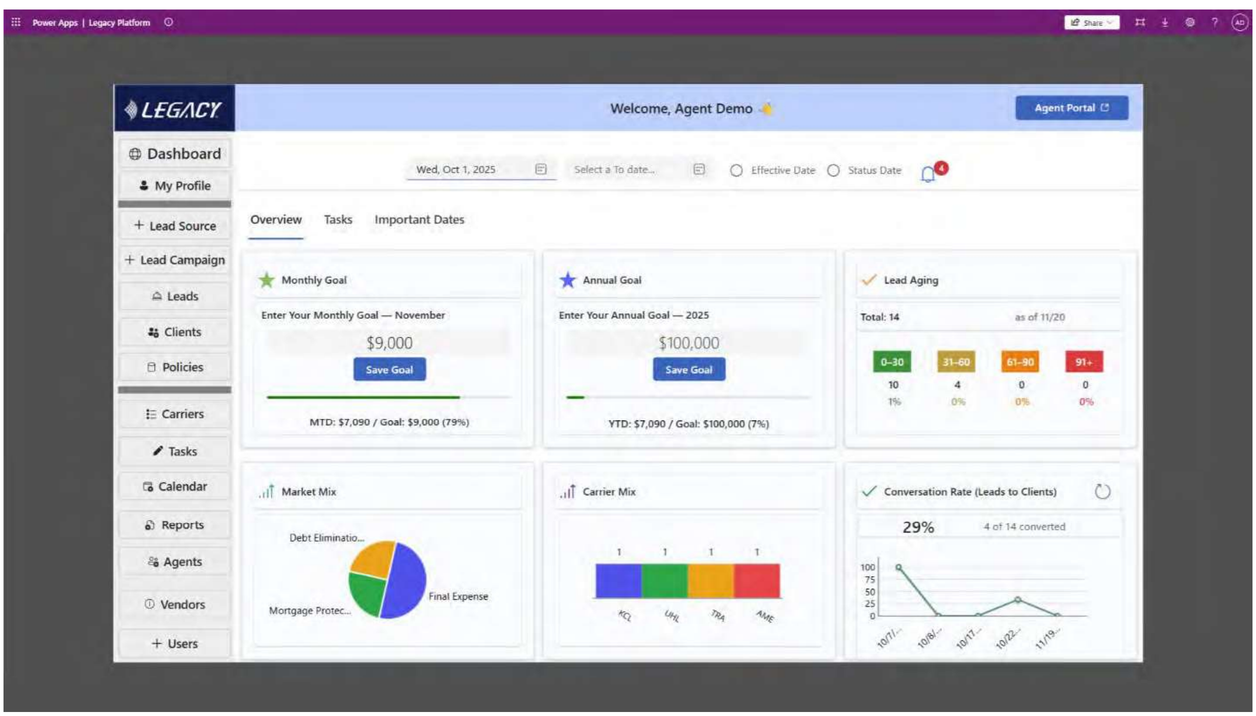
This section covers the **Overview** tab.

2.1 Overview Tab

The **Overview** tab provides a real-time snapshot of your production goals, lead activity, and business mix. At the top of the screen are **Date Filters** that control what data the Dashboard tiles display. By adjusting these dates, you can instantly customize the view to match the period you want to analyze.

Below is the Overview tab:

Dashboard → Overview Tab



Date Filters (From & To Date Pickers)

At the top of the Dashboard, you will see two date selectors:

- **From Date**
- **To Date**

These date pickers determine the time range for all of the tiles on the Overview tab, including:

- Monthly Goal (MTD progress)
- Annual Goal (YTD progress)
- Lead Aging
- Market Mix
- Carrier Mix
- Conversion Rate

Whenever you change the date range, the Dashboard automatically recalculates and refreshes each tile.

Why this matters:

- You can review **daily**, **weekly**, **monthly**, **quarterly**, or **custom** time periods
- You can analyze **past performance** by choosing earlier dates
- You can verify **real-time progress** during the current month or year

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💡 **Tip: Setting Dates for Accurate YTD Tracking**

To ensure your **Annual Goal** tile displays accurate Year-to-Date performance:

➡️ **Set your From Date to January 1st of the current year**
➡️ Keep your To Date set to today (or a date later in the year if reviewing past performance)

This ensures that the Dashboard calculates your YTD progress correctly based on all business written during the year.

Monthly Goal

This tile allows you to set and track your *Monthly Production Goal*.

- Enter your monthly goal
- Select the appropriate date range above
- Click **Save Goal**
- The MTD progress bar updates automatically based on your selected dates

This provides a fast visual reference of how close you are to completing your monthly target.

Annual Goal

This tile tracks your *Annual Production Goal*.

- Enter your yearly goal
- Set your date range (use January 1 for accurate YTD tracking)
- Click **Save Goal**
- The YTD progress bar shows your progress across the year

Agents typically set their annual goal once, but it can be updated at any time.

Lead Aging

The Lead Aging tile groups active leads into four aging brackets:

- 0–30 days
- 31–60 days
- 61–90 days
- 91+ days

These numbers will update based on the date range you've selected at the top of the Dashboard. This helps you quickly identify leads that need immediate follow-up.

Market Mix

This chart displays the types of business you've written in the selected date range. Examples include:

- Final Expense
- Mortgage Protection
- Debt Elimination
- Other lines depending on your production

Useful for spotting trends or identifying where most of your business is coming from.

Carrier Mix

This chart shows how many policies you've written with each carrier during the selected date range.

This is helpful when:

- Tracking carrier requirements
- Monitoring diversification
- Ensuring your business remains balanced

Conversion Rate (Leads to Clients)

This tile shows your conversion percentage based on the selected date range:

- Total leads in the period
- Total converted to clients
- Conversion percentage
- A trend line of conversions over time

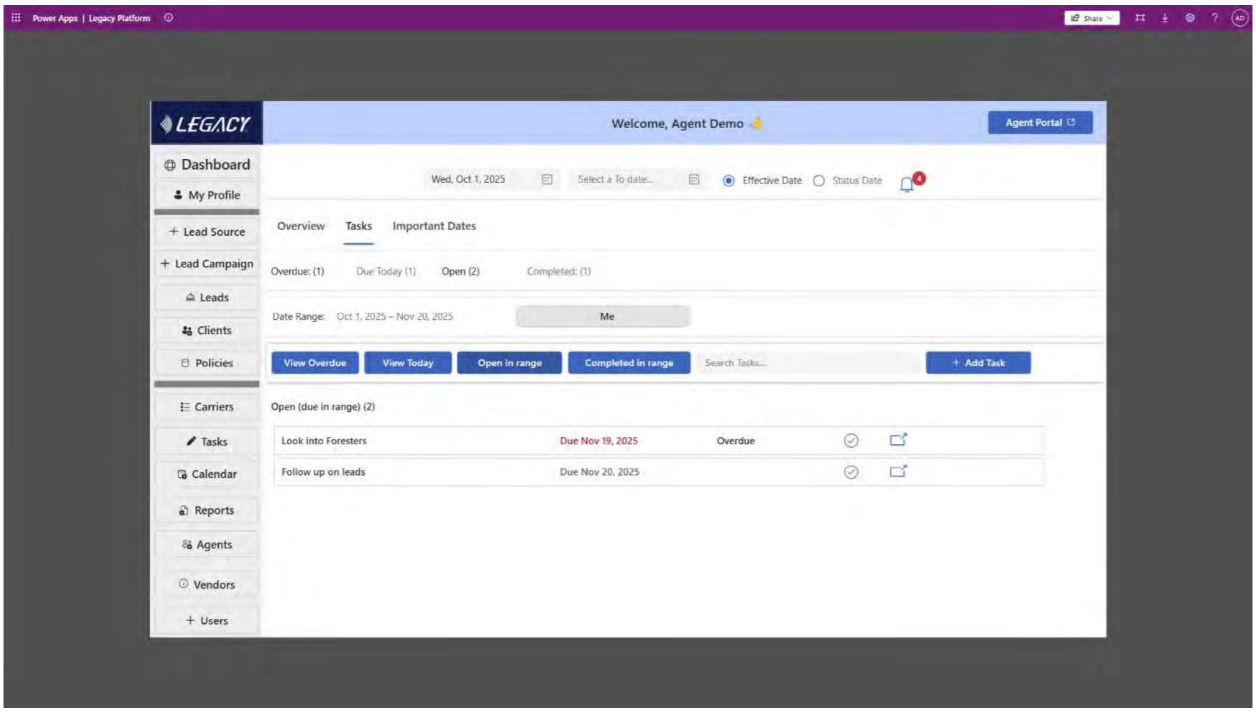
Great for understanding the effectiveness of your lead follow-up process.

2.2 Tasks Tab

The **Tasks** tab on the Dashboard gives you a complete view of your daily, upcoming, and overdue tasks. This helps you stay organized and ensures that follow-ups, carrier calls, lead activities, and client work never fall through the cracks.

Below is the Tasks tab:

Dashboard → Tasks Tab



Task Summary Bar

At the top of the Tasks tab, you will see the **Task Summary Bar**, which displays four key counts:

- **Overdue**
- **Due Today**
- **Open** (due in the selected date range)
- **Completed**

Each of these categories is clickable. When you select a category, the list below automatically filters to show only those tasks.

This summary gives you a quick snapshot of your workload as soon as you open the Tasks tab.

Task Notification Bell (Global Task Counter)

At the very top of the Dashboard—next to the date filters—you will see a **bell icon** with a **red task bubble**.
This bubble displays:

- Your **total open tasks**
- The count updates every time you log in
- The number increases as you add tasks and decreases as you complete them

This bubble is visible across multiple screens, allowing you to stay aware of pending tasks no matter where you are in the app.

Date Filters (From & To Dates)

Just like the Overview tab, the Tasks tab uses the same **date range pickers** at the top of the screen. These determine which tasks appear on the list.

For example:

- Setting the date range to **Oct 1 – Nov 20** will show all tasks due within that window
- Changing the date range instantly updates the tasks shown in each category
- You can view tasks from previous weeks, months, or custom date ranges

Tasks are always filtered based on their **Due Date**, allowing you to tailor your view to match your workflow.

Task Filter Buttons

Below the date range, you will see four important quick-filter buttons:

View Overdue

Shows only tasks that are past their due date.

View Today

Shows tasks due today, helping you prioritize your daily workflow.

Open in Range

Shows tasks with due dates within the selected date range.

Completed in Range

Shows tasks you have completed within the selected date range.

These buttons make it easy to focus on exactly what you need to work on—without scrolling through long lists.

Task List

All tasks that match the selected date range and filter appear in the list section.

Each task row includes:

- **Task Name**
- **Due Date** (turns red if overdue)
- **Status** (Open, Overdue, or Completed)
- **Complete Button** (checkmark icon)
- **Open Task Details Button** (external link icon to open the task form)

When you complete a task using the checkmark icon:

- The task updates to **Completed**
- It disappears from the Open/Overdue list
- Your notification bubble count decreases

Add Task Button

Click **+ Add Task** to create a new task.

You may add tasks such as:

- Lead follow-up
- Carrier calls
- Client meeting prep
- Policy review reminders
- Administrative tasks

Tasks you add appear instantly in your list based on their due date.

✔ Summary of What Happens When You Log In

When you first sign in:

- The system loads your **open tasks**
- The **red bubble** shows the total number of open tasks
- The **Summary Bar** (Overdue / Today / Open / Completed) loads counts based on your date filters
- Your tasks auto-sort into the correct categories
- Any overdue task due before today is highlighted and marked accordingly

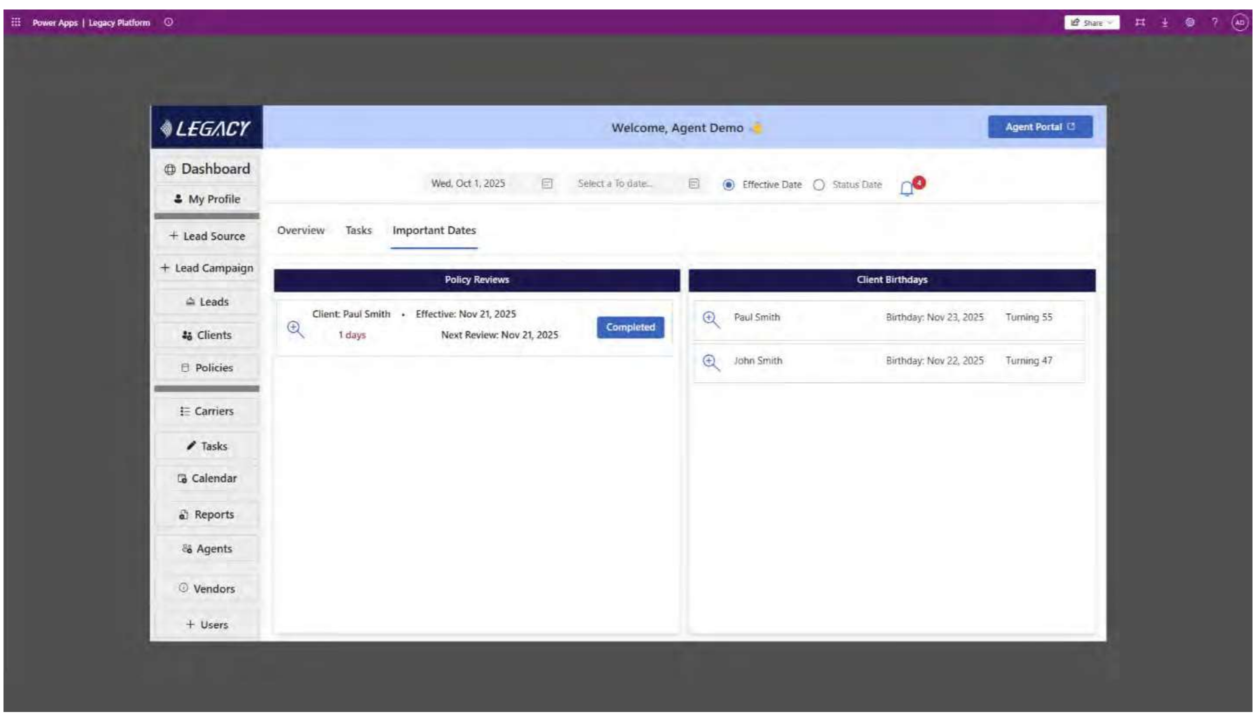
This gives you a clear picture of your obligations for the day.

2.3 Important Dates Tab

The **Important Dates** tab highlights the most time-sensitive items in your book of business—policy reviews and upcoming client birthdays. These events are automatically pulled from your client and policy data and filtered using the date pickers at the top of the Dashboard.

Below is the Important Dates tab:

Dashboard → Important Dates Tab



Using the Date Filters

The Important Dates tab uses the same **From Date** and **To Date** fields located at the top of the Dashboard. These determine which birthdays and policy reviews appear.

You can toggle between:

- **Effective Date**
- **Status Date**

For this tab, **Effective Date** is generally the most useful option because it aligns with renewal cycles and review periods.

Changing the date range instantly updates both lists:

- **Policy Reviews**
- **Client Birthdays**

Policy Reviews Panel

This section displays policies with upcoming review dates. The system automatically calculates reviews based on:

- The policy's **Effective Date**, and
- The **Next Review Date** (typically 12 months after effective date, unless changed)

Each policy review card includes:

- **Client Name**
- **Effective Date**
- **Next Review Date**
- A countdown showing how many days remain
- A **Completed** button if you've already finished the review
- A **magnifying glass icon** that opens the full Policy screen

How to use this panel

- Click the **magnifying glass** to view the full policy details
- Use the **Completed** button to mark the review as finished
- The completed review will no longer appear once marked

This ensures you stay ahead of annual reviews, renewals, and client touchpoints.

Client Birthdays Panel

This panel lists all clients with birthdays falling within the date range you selected at the top.

For each client, you will see:

- **Client Name**
- **Birthday (Month / Day / Year)**
- **Turning Age**

Clicking the magnifying glass icon takes you directly to the Client Details screen.

Why birthdays matter

Client birthdays are essential for:

- Annual reviews
- Coverage adjustments
- Age-specific product opportunities
- Personalized outreach & relationship building

Agents often use this panel to send birthday messages or schedule follow-ups.

How the Important Dates Tab Helps You

This tab is designed to help you quickly:

- Identify clients who need attention **this week or month**
- Prepare for renewals and reviews in advance
- Strengthen relationships through birthday outreach
- Stay compliant with scheduled touchpoints
- Keep policy activity proactive rather than reactive

Because it updates dynamically based on your selected date range, it can be used for daily check-ins, weekly planning, or monthly review cycles.

3. My Profile

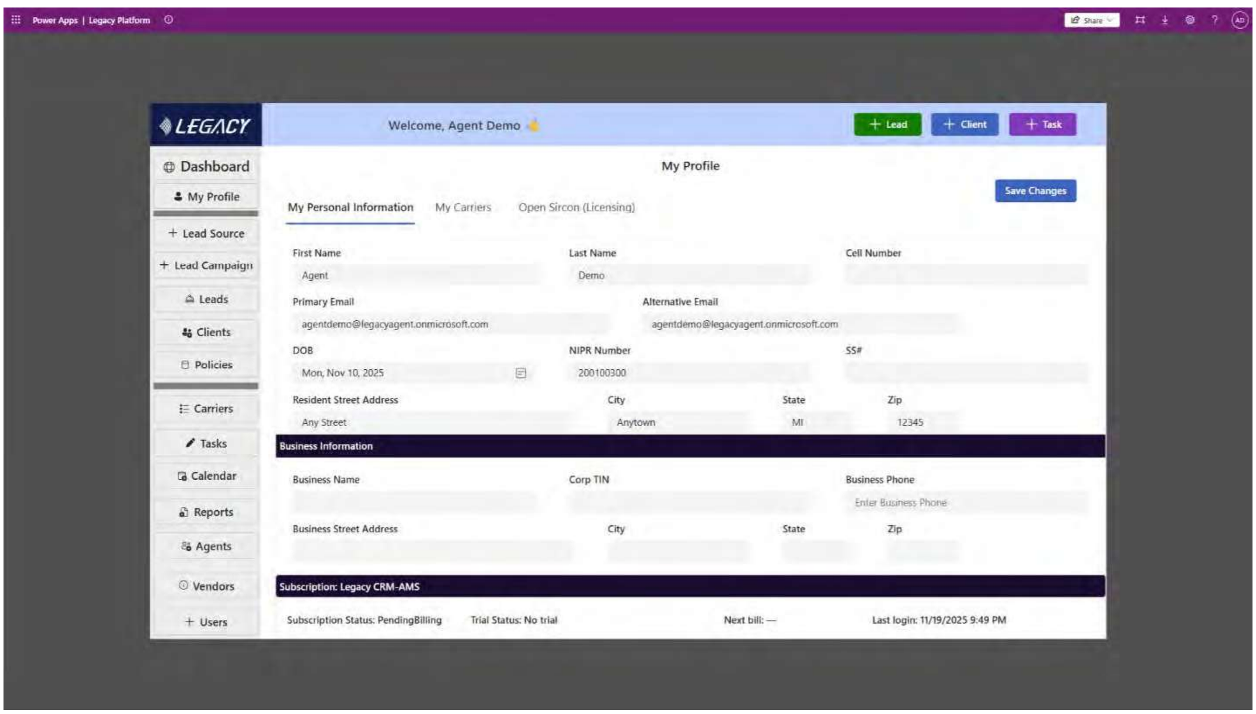
The My Profile screen allows agents to review and update their personal information, business details, and subscription information. It also provides direct access to your carrier appointments and licensing status through Sircon.

This page is divided into three interactive sections:

1. My Personal Information *(editable tab)*
2. My Carriers *(separate tab—handled in the next subsection)*
3. Open Sircon (Licensing) *(external link styled as a tab)*

Below is the My Profile screen:

My Profile → My Personal Information Tab



3.1 My Personal Information Tab

The My Personal Information tab is the default view when opening the My Profile section. This is where you maintain and update your core profile data.

At the top, you will see the header:

"Welcome, Agent Demo 👋"

This dynamically shows the logged-in agent's name.

Directly below the header, you will find the action buttons, which are always available while viewing your profile:

- \+ Lead – Create a new lead

- + Client – Create a new client
- + Task – Create a new task related to yourself or a client

These buttons help you quickly enter new records without leaving the page.

3.1.1 Personal Information Fields

This section includes key identifying contact details for the agent:

- First Name
- Last Name
- Cell Number
- Primary Email (main CRM email; used for notifications and login)
- Alternative Email (optional backup)
- DOB (Date of Birth)
- NIPR Number (National Producer Number)
- SS# (if stored; masked or secured per system configuration)

These fields are used internally for compliance, carrier appointments, reporting, and maintaining accurate user records.

3.1.2 Resident Address

This section captures your personal residential address:

- Resident Street Address
- City
- State
- Zip

This information may be required by carriers for contracting or appointment updates.

3.1.3 Business Information

This section records your agency or business entity details if applicable:

- Business Name
- Corp TIN (Tax Identification Number)
- Business Phone

- Business Street Address
- City
- State
- Zip

This information is important for:

- Commission processing
- 1099 reporting
- Carrier contracting
- Agency alignment

Even independent agents should keep this area accurate.

3.1.4 Subscription Information

At the bottom of the profile page is the Subscription: Legacy CRM-AMS section, which includes:

- Subscription Status (e.g., Pending, Active, Suspended)
- Trial Status (if applicable)
- Next Bill Date (if subscription billing is enabled)
- Last Login (timestamp of your most recent login)

This helps agents monitor their subscription standing and usage history.

3.1.5 Save Changes Button

Located to the upper right of the tab is the Save Changes button.

After updating any part of your personal or business information, click Save Changes to store the updates permanently.

If you attempt to leave without saving, unsaved changes may be lost.

3.1.6 Open Sircon (Licensing)

This appears as a tab—but it is actually a direct link to:

Sircon → Licensing Portal

Clicking it opens the external Sircon site where agents can:

- View all active insurance licenses

- Review renewal dates
- Complete CE requirements
- Track license status across states

This is intentionally designed to look like a tab so that it feels integrated into the profile workflow, while still linking to the official licensing authority.

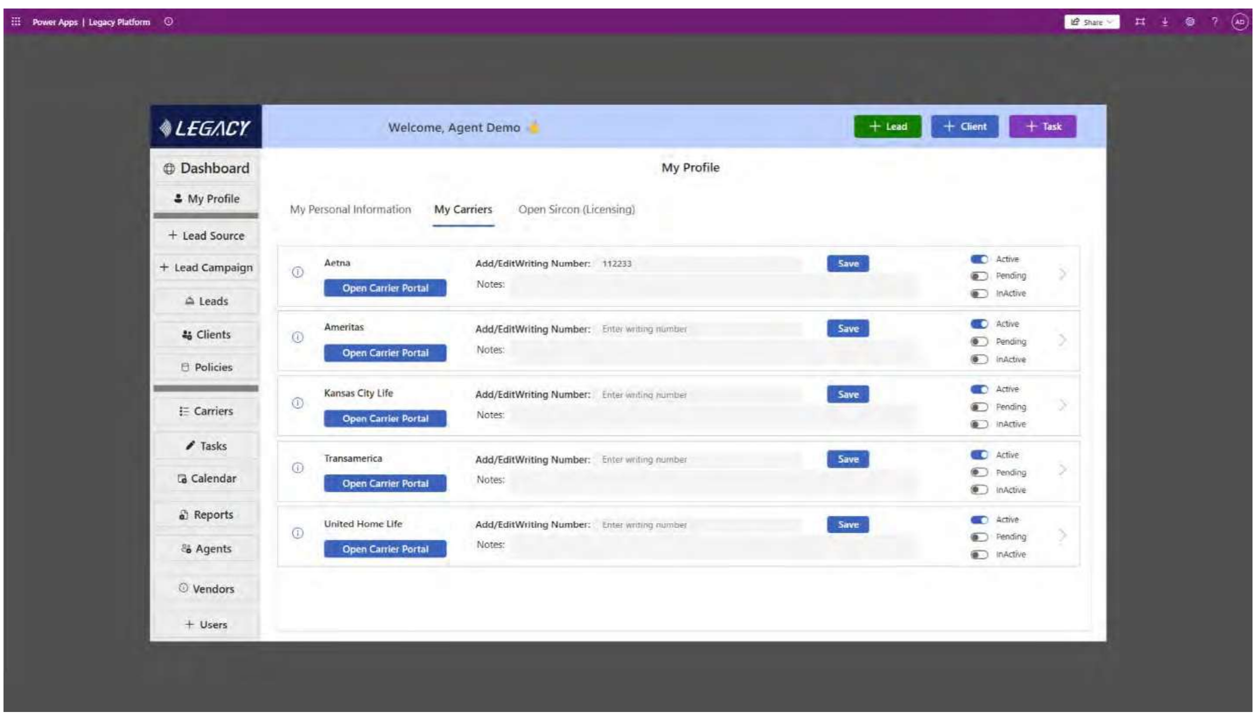
3.2 My Carriers Tab

The My Carriers tab allows you to review your appointed carriers, update your writing numbers, add notes for each carrier, and maintain your personal record of contracting status.

This tab is especially useful for agents who work with multiple carriers, as it keeps your carrier information organized in one central place.

Below is the My Carriers tab:

My Profile → My Carriers



3.2.1 Carrier List (Gallery Layout)

Each carrier appears as its own row in a scrollable gallery.
Every row contains:

1. Carrier Name (e.g., *Aetna, Ameritas, Kansas City Life*)
2. Information Icon (i) – typically opens carrier details (if enabled in your app).
3. Open Carrier Portal button – takes you directly to the carrier's login page.

This gives agents quick access to carrier portals without leaving the CRM.

3.2.2 Writing Number Field

Each carrier row includes:

Add/Edit Writing Number:

A text field where you can enter or update your:

- Writing Number
- Agent Number
- Producer ID
- Producer Code (depending on the carrier)

Saving Your Writing Number

After entering the number, click Save.
This stores the writing number into your personal carrier profile record.

Agents typically enter their writing number once per carrier, unless it changes.

3.2.3 Notes Field

Directly beneath the writing number field is a Notes box.

Agents commonly use this for:

- Carrier login usernames
- Portal reminders
- Contact information
- Notes about appointment dates
- Miscellaneous contracting details

This field is agent-specific and only visible to you.

3.2.4 Contract Status Toggles

To the right side of each row are three toggles:

- Active
- Pending
- Inactive

These allow you to mark the current status of your contract with the carrier.

How to Use Them:

- Active – Your appointment is live & you can write business
- Pending – Appointment submitted but not yet approved
- Inactive – No current appointment or terminated status

Only one status should be active at a time. The toggles help you visually confirm which carriers you are ready to write with.

3.2.5 Expand / Detail Button

On the far right is an arrow icon (>), which will open the full carrier detail record if that feature is enabled for your role.

This may include:

- Carrier products
- Official contact numbers
- Rate calculators
- Additional tools

Depending on agent permissions, this feature may vary.

3.2.6 Save Button (per carrier)

Each carrier row has its own Save button.
This ensures:

- Writing Numbers
- Notes
- Status Changes

...are saved individually, without affecting other carriers.

If you change multiple carriers, make sure to save each row separately.

Why the My Carriers Tab Matters

This tab helps agents:

- Keep track of their appointments
- Store writing numbers safely
- Quickly access each carrier portal
- Monitor active vs. pending contracts
- Stay organized before selling a policy

By maintaining accurate carrier information, you prevent delays in submitting business and ensure smooth contracting.

4. Lead Source

Lead Sources help you track exactly where your leads originate—Facebook, Zillow, StrongPoint Digital, referrals, vendor lists, etc.

Choosing the correct Lead Source is essential for:

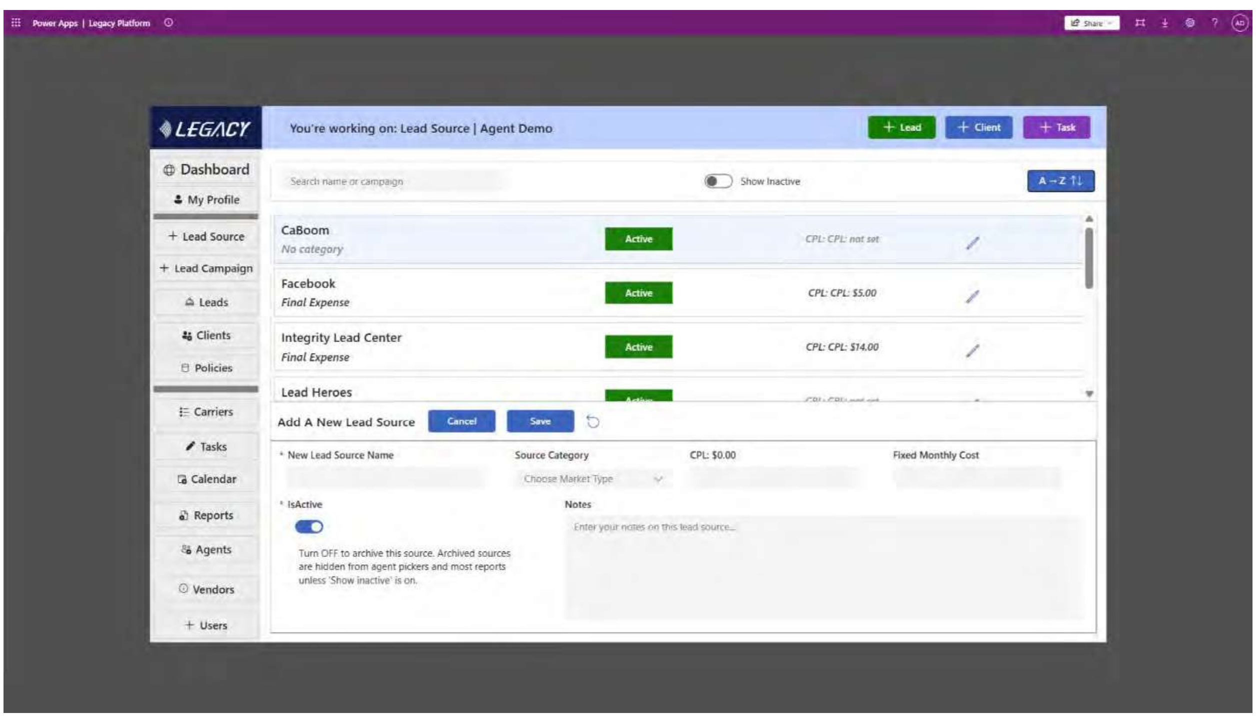
- Understanding ROI
- Optimizing marketing spend
- Analyzing lead performance
- Improving conversion rates
- Tracking Lead → Client pipeline metrics
- Powering Dashboard tiles
- Feeding data into the Lead Campaign and ROI reporting

This screen is divided into two main components:

1. Lead Source List (top)
2. Add/Edit Lead Source Form (bottom)

Below is the Lead Source screen:

Lead Source → Main Screen



4.1 Lead Source List (Top Section)

This section lists all the lead sources currently available to the agent.

4.1.1 Header Bar

At the top of the screen, you will see:

"You're working on: Lead Source | Agent Demo"

This tells you whose lead source list is being viewed (your own).

Next to the header are the universal action buttons:

- + Lead – Create a new lead
- + Client – Create a new client
- + Task – Create a new task

These buttons remain consistent across CRM-AMS screens for quick access.

4.1.2 Search by Name or Campaign

The search bar lets you filter the list by typing:

- Lead Source name
- Associated Campaign name

This helps you quickly locate specific vendors or categories in long lists.

4.1.3 Show Inactive Toggle

Turning this toggle ON will display:

- Archived sources
- Sources no longer used
- Vendor types that have been retired

By default, inactive sources are hidden to keep the list clean.

4.1.4 Sort Alphabetically (A → Z)

This button sorts all lead sources alphabetically.
When working with many vendors or marketing sources, this makes it easy to locate items quickly.

4.1.5 Lead Source Rows (Gallery Items)

Each lead source appears as a row with:

1. Lead Source Name

Examples include:

- CaBoom
- Facebook
- Integrity Lead Center
- Lead Heroes

2. Category (Optional Display)

Shown under the name, such as:

- Final Expense
- Medicaid
- Mortgage Protection
  If no category is assigned, it displays *No category*.

3. Status Badge

A green badge labeled Active indicates that the source is available for use.

If archived, it will not appear unless “Show inactive” is on.

4. CPL (Cost Per Lead)

Displayed as:

- CPL: $5.00
- CPL: $14.00
- CPL: not set

This is essential for ROI tracking and understanding vendor performance.

5. Edit Icon (Pencil)

Clicking the pencil opens that source in the form below for editing.

This allows you to update:

- Name
- Category
- Cost
- Internal notes

- Status (Active/Inactive)

4.2 Add a New Lead Source (Bottom Section)

The form at the bottom is where you enter new source data or edit an existing one.

This is a critical part of your CRM-AMS setup, because accurate Lead Source data drives all downstream reporting.

4.2.1 New Lead Source Name (Required)

This is the name of the vendor or origin of the lead.
Examples:

- Facebook
- SEO / Website
- Live Transfers
- StrongPoint Digital
- Zillow
- Referrals

This is required because it acts as the parent category for connected campaigns.

4.2.2 Source Category (Market Type)

A dropdown selector that allows you to categorize the source into one of the system's Market Types, such as:

- Final Expense
- Mortgage Protection
- Debt Elimination
- Medicare
- Annuity

This categorization impacts all market mix reporting and is carried into the Dashboard.

4.2.3 CPL — Cost Per Lead

Enter the price you pay (or estimate you assign) per lead.
Used for ROI calculations in reporting and useful for decision-making.

4.2.4 Fixed Monthly Cost

If the lead source charges a subscription fee or fixed cost, enter it here.

Examples:

- $99/month for Facebook ads
- $500/month for a vendor list
- $200/month campaign retainer

This value feeds the Campaign + Source ROI report.

4.2.5 IsActive Toggle

Turning this OFF archives the lead source.

Archived sources:

- Do not show in new lead creation
- Do not appear in dropdowns
- Are hidden in most reports
- Only show when “Show inactive” is toggled on

Use this when a vendor is discontinued or retired.

4.2.6 Notes

Agents can enter internal notes here such as:

- Contact info for the vendor
- Login credentials
- Campaign performance remarks
- Payment details
- Instructions for running the campaign

These notes are agent-only and do not affect system logic.

4.2.7 Save / Cancel Buttons

- Save updates or creates a lead source
- Cancel clears the form
- The “reset” icon reloads the panel

4.3 IMPORTANT: Lead Source → Lead Campaign → ROI → Lead Conversion Pipeline

This is a critical business insight and MUST be highlighted in your training:

- Every Lead Source can have Lead Campaigns assigned to it
- Every Lead Campaign is tied to:
  - Market Type
  - CPL
  - Fixed Monthly Cost
- All of this flows into:
  - Lead → Client conversion metrics
  - ROI reporting
  - Market Mix
  - Carrier Mix
  - Dashboard performance tiles
  - Campaign profitability analysis

Because of this, accurate Lead Sources are vital to understanding:

- Which marketing channels work
- Which vendors provide the best quality
- Which campaigns deliver real results
- What you should spend MORE money on
- What should be eliminated

This is one of the most important data hygiene practices in the entire CRM.

5. Lead Campaign

Lead Campaigns allow you to track individual marketing campaigns connected to a Lead Source. Each campaign can have:

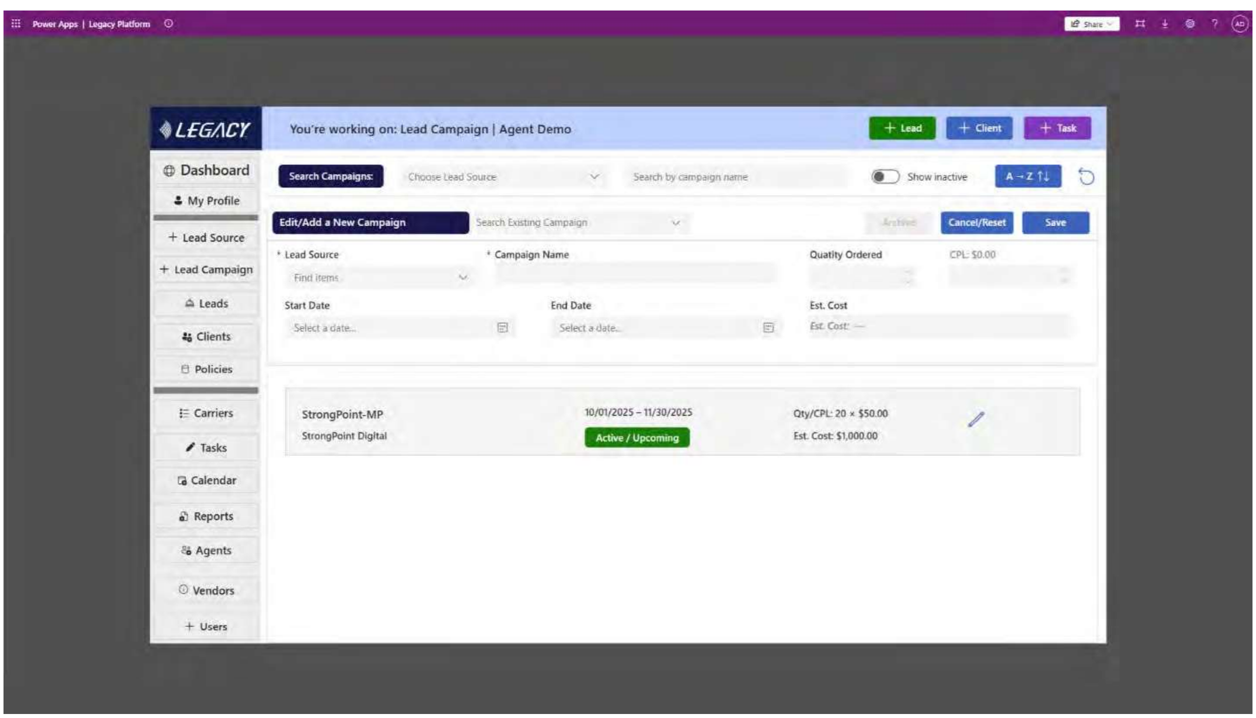
- A defined date range
- A cost-per-lead (CPL)
- A quantity ordered
- Estimated cost
- Market type (inherited from the Lead Source)

Campaign tracking is essential for:

- ROI reporting
- Performance analysis
- Understanding which campaigns generate the best leads
- Connecting leads to specific campaigns inside the CRM
- Viewing conversion rates by campaign
- Dashboard and reporting accuracy

Below is the Lead Campaign screen:

Lead Campaign → Main Screen



5.1 Page Header & Action Bar

At the top of the screen, you will see:

"You're working on: Lead Campaign | Agent Demo"

This confirms that you are viewing and editing your own campaigns.

To the right of the header are three quick-access buttons:

- + Lead – Create a new lead
- + Client – Create a new client
- + Task – Create a new task

These remain visible across CRM-AMS screens for convenience.

5.2 Campaign Search & Filters (Top Controls)

Search Campaigns (Left)

You can search campaigns by:

- Vendor
- Campaign name
- Notes (if supported)

This helps you quickly locate active or archived campaigns.

Choose Lead Source (Middle)

This dropdown filters campaigns by Lead Source.
Example:

- Show only Facebook campaigns
- Show only StrongPoint Digital campaigns

Search by Campaign Name (Right)

This focuses specifically on campaign names, helping you locate:

- Historical campaigns
- Seasonal campaigns
- Multi-vendor campaigns

Show Inactive Toggle

Turns ON to display archived or expired campaigns.

By default, inactive items are hidden.

Sort Button (A → Z)

Sorts all campaigns alphabetically, which is helpful when managing long lists.

Reload/Refresh Icon

Reloads the list and resets the campaign form, ensuring you always see up-to-date data.

5.3 Edit/Add a New Campaign Form

This is the main area where new campaigns are created or existing ones are edited.

The form fields include:

5.3.1 Lead Source (Required)

Select the parent Lead Source this campaign belongs to.
Example sources:

- StrongPoint Digital
- Facebook
- Lead Heroes
- SEO / Website

This relationship is mandatory, because the ROI engine links:

Source → Campaign → Lead → Conversion → Cost

5.3.2 Campaign Name (Required)

Enter a short, descriptive name for the campaign.

❗ **PRO TIP: Use clear, specific campaign names.**

Avoid generic names like:

- “Mortgage Protection”
- “Final Expense”

These are too broad and create confusion when multiple campaigns from the same vendor exist.

✔ **Recommended Example:**

StrongPoint MP – October 2025 – 20 Leads @ $50

This tells you:

- Vendor: StrongPoint Digital
- Market: Mortgage Protection

- Month: October
- Volume: 20 leads
- CPL: $50

Structured naming helps agents quickly recognize campaigns when assigning them inside a Lead record.

5.3.3 Start Date & End Date

Select the exact date range the campaign runs.

The date range is crucial for:

- Reports
- ROI calculations
- Knowing which leads belong to which campaign
- Seasonal trends
- Planning future campaigns

5.3.4 Quantity Ordered

Enter the number of leads you purchased for this specific campaign.

Example:

- 20 leads
- 50 live transfers
- 100 aged leads

5.3.5 CPL – Cost Per Lead

The price per lead for this campaign.

This automatically pulls from the Lead Source CPL if set, but you can override it if the campaign has a special rate.

Example:

- CPL: $50.00
- CPL: $14.00
- CPL: $5.00

5.3.6 Estimated Cost (Auto-Populated)

The system calculates:

Quantity × CPL = Estimated Cost

Example:
20 × $50 = $1,000

This cost shows in:

- Reports
- Campaign ROI
- Dashboard marketing insights

5.3.7 Archive, Cancel/Reset, Save Buttons

Save

Stores a new or updated campaign.

Cancel/Reset

Clears the form and resets to default.

Archive

Hides the campaign from:

- New lead creation
- Drop-down lists
- Most reports

Archived campaigns remain in historical ROI data.

5.4 Campaign Gallery (Bottom Section)

After a campaign is created and saved, it appears in the gallery below.

Each campaign card displays:

- Campaign Name
- Lead Source (under the name)
- Date Range (Start Date → End Date)
- Status Badge (Active / Upcoming / Expired)
- Qty & CPL

- Estimated Cost
- Edit Icon (Pencil)

Clicking the pencil loads that campaign back into the form for editing.

5.5 Why Lead Campaigns Matter

Lead Campaigns provide essential data for:

✓ ROI Reporting

Track:

- Cost per campaign
- Cost per converted client
- Profitability
- Vendor performance

✓ Lead Source Analysis

Compare campaigns *within* a source to see what works.

✓ Dashboard Insight

Drives widgets such as:

- Conversion Rate
- Lead Aging
- Market Mix

✓ Lead → Client Conversion Tracking

Every converted lead is tied back to:

Source → Campaign → Lead → Client

This is the backbone of your CRM's business intelligence.

5.6 Best Practices for Agents

- Always choose the correct campaign when adding or editing a lead
- Keep campaign names short but descriptive
- Use date ranges to track seasonality
- Enter accurate CPL and quantity to ensure proper ROI measures
- Archive campaigns once expired
- Keep Lead Sources and Campaigns aligned for clean reporting

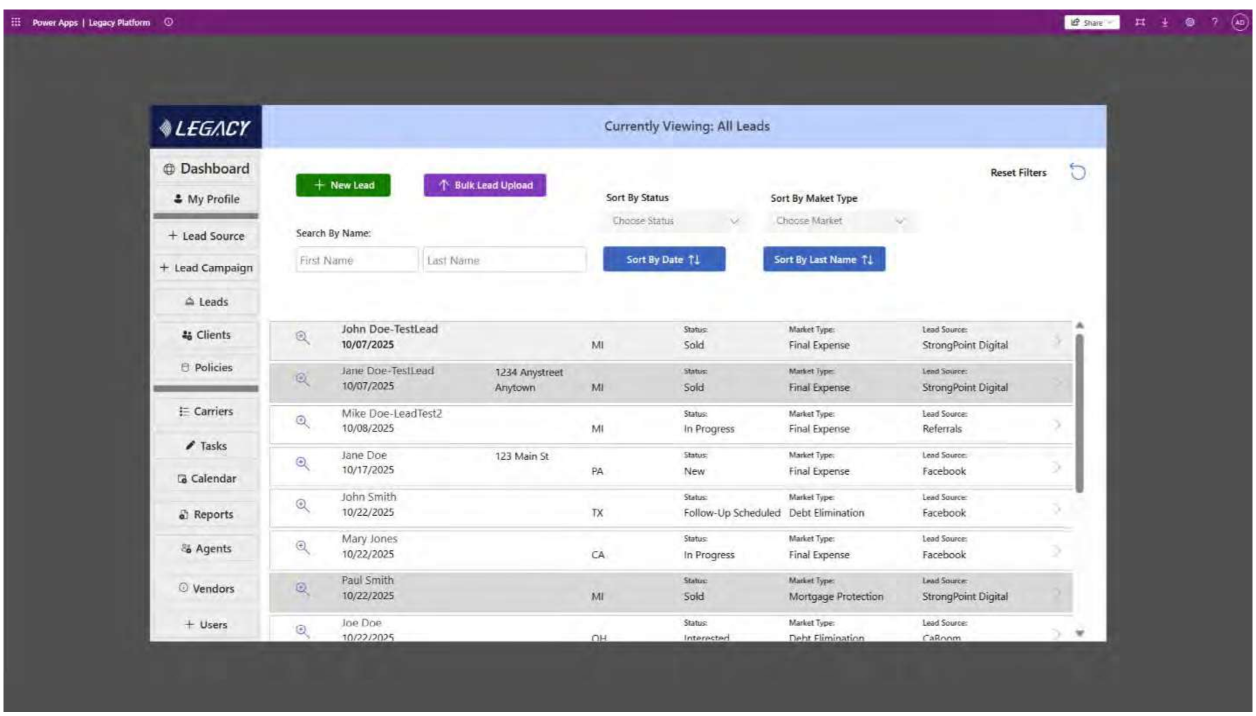
6. Leads

Managing leads is one of the core functions of Legacy CRM-AMS. The system helps agents stay organized, follow up consistently, and convert leads into active clients efficiently.

The **Leads Home Screen** is where you can view, sort, filter, and search all of your leads. From here, you can also add new leads manually or upload a batch of leads at once.

Below is the Leads Home Screen:

Leads → Home Screen



6.1 Leads Home Screen

The Leads Home Screen provides a full list of your leads along with tools to quickly locate, sort, and manage them. This screen is designed to help you find any lead with minimal effort and to keep your pipeline clean and organized.

New Lead Button

The **+ New Lead** button allows you to manually create a new lead inside the system.

Use this when:

- A lead calls or messages you directly
- Someone is referred to you
- You're entering leads from events or networking

Clicking this button opens the **Lead Input Form**, where you can enter details such as name, address, contact info, source, and status.

Bulk Lead Upload Button

The **Bulk Lead Upload** button allows you to upload multiple leads at once using a CSV file.

This is ideal for:

- Purchased leads
- Vendor uploads
- Importing large batches at the beginning of the month
- Migrating legacy data

After uploading, the system will process each lead and display a summary of valid vs. invalid entries.

Search by Name

You can quickly find a lead by entering the **First Name** or **Last Name** in the search fields.

- Searching filters the list in real time
- Partial entries are accepted (e.g., "Jo" will match "John")
- Searches apply regardless of sort order

This is the fastest way to locate a specific lead.

Sort By Status

The **Sort By Status** dropdown allows you to filter leads based on their current status, such as:

- New
- Interested

- In Progress
- Sold
- Follow-Up Scheduled
- Not Interested
- Do Not Contact

Select a status to instantly filter the list to only those leads.

Sort By Market Type

The **Sort By Market Type** dropdown helps you filter leads by the type of product or market category, such as:

- Final Expense
- Mortgage Protection
- Debt Elimination
- Annuity
- Retirement Income
- Other custom categories

This is useful for agents who work multiple product lines.

Sort By Date Button

The **Sort By Date** button organizes leads based on:

- Lead creation date
- Most recent leads on top (or bottom, depending on toggle)
- Automatically recalculated as new leads are added

This is helpful for reviewing new leads or working the freshest opportunities.

Sort By Last Name Button

The **Sort By Last Name** button sorts the entire list alphabetically by last name (A → Z or Z → A depending on toggle).

This is ideal when you know the last name of a lead or want an alphabetical view of your pipeline.

Reset Filters Icon

The reset icon (↻) instantly clears:

- Name searches
- Status filters
- Market Type filters
- Sorting selections

Once clicked, the full unfiltered lead list reappears.

This is especially helpful after performing multiple sorts or searches.

Lead List (Main Table)

The lower section of the screen displays the full list of leads. Each row includes:

Lead Name (large text)

Displayed prominently for easy scanning.

Lead Date

Shown beneath the name (e.g., *10/07/2025*).
This helps you track when the lead entered your pipeline.

City / State or Address (when available)

Status

Displayed on the right side of the row (e.g., *New, Sold, In Progress*).

Market Type

Shows the type of insurance product the lead is connected to.

Lead Source

Shows the source of the lead such as:

- StrongPoint Digital
- Facebook
- Referrals
- In-house campaign
- Vendor name

Understanding your sources helps monitor performance and ROI.

Magnifying Glass Icon (Open Lead Details)

Each lead row includes a **magnifying glass icon** on the left side.
Click it to open the detailed **Lead Input screen**, where you can:

- Edit lead information
- Add or read notes
- Update status
- Convert the lead into a client
- Review history and activity

This is the primary way to manage an individual lead.

Scrolling Through Leads

If you have more leads than can be displayed on the screen, a **vertical scroll bar** appears on the right side of the lead list.

Use the scroll bar to:

- **View older leads**
  Helpful when you've been working the pipeline for several months or when reviewing historical conversions.
- **Check leads that match your filters**
  If you have applied filters (status, market type, date, etc.), scrolling allows you to move through the filtered list without losing your place.
- **Navigate large batches after uploads**
  Bulk Lead Uploads may add dozens of leads at once—scrolling lets you review, manage, and work through them efficiently.

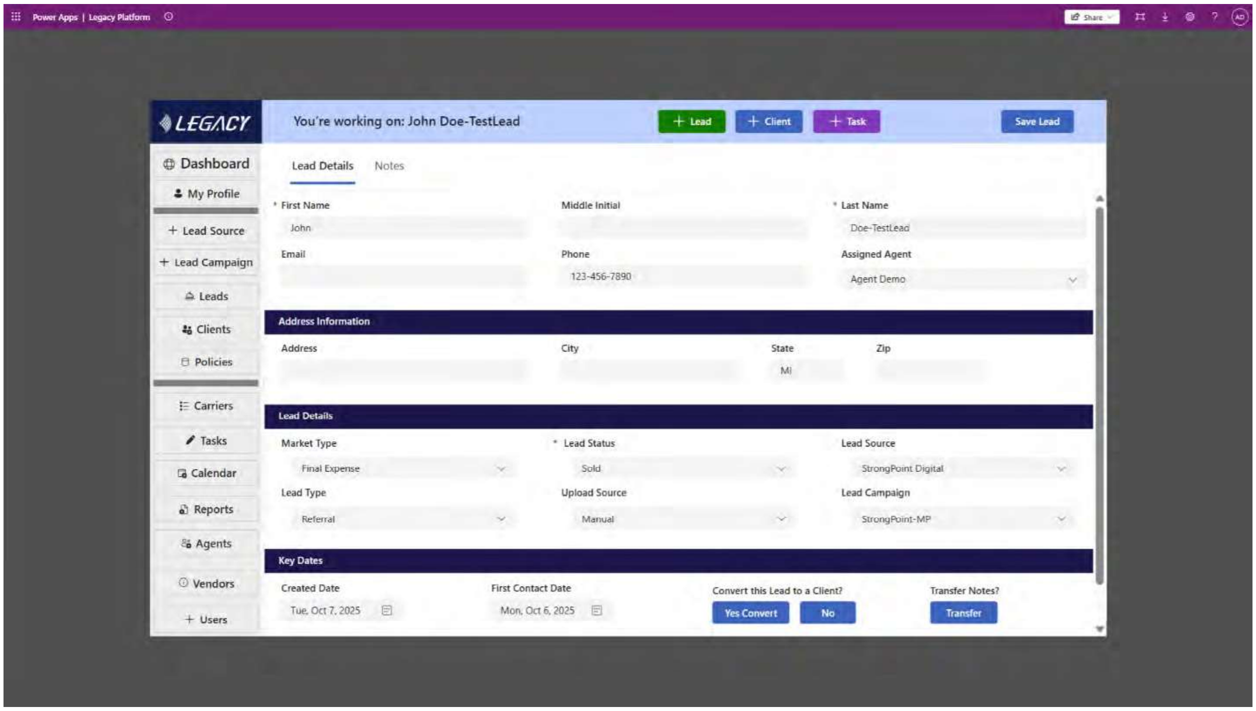
Scrolling does not affect any sorting or filtering settings; it simply provides access to all leads returned by your current filter view.

6.2 Lead Details Tab

The **Lead Details Tab** is where agents review, update, and manage all information associated with an individual lead. This is the core workspace for working leads through the pipeline.

Below is the Lead Details tab:

Lead → Lead Details Tab



6.2.1 Header Bar (Lead Context & Actions)

At the top of the screen, the system displays:

"You're working on: [Lead Name]"

This ensures you always know which lead record you are editing.

Beneath the header are universal action buttons:

- **+ Lead** – Create a new lead
- **+ Client** – Create a new client
- **+ Task** – Create a new task tied to this lead
- **Save Lead** – Saves all updates to the current lead

These buttons allow you to take action instantly without leaving the screen.

6.2.2 Personal Information Fields

These fields identify the lead and provide contact information.

- **First Name***
- Middle Initial
- **Last Name***
- Email
- Phone
- Assigned Agent (auto-populated for Agents; selectable for Admins)

Required fields are marked with an asterisk (*).

6.2.3 Address Information

This section tracks physical location details for the lead:

- Address
- City
- State
- Zip

Some vendors automatically populate this data during bulk upload.

6.2.4 Lead Details (Status, Source & Attributes)

This section includes the core business attributes used for sorting, filtering, and reporting.

- **Market Type** (e.g., Final Expense, Mortgage Protection, Debt Elimination)
- **Lead Status*** (New, Interested, In Progress, Sold, etc.)
- **Lead Source** (Where the lead originated—e.g., StrongPoint Digital, Facebook)
- **Lead Type** (Referral, Internet, Inbound Call, Event)
- **Upload Source** (Manual, Vendor Import)
- **Lead Campaign** (Your associated marketing campaign)

These fields directly fuel:

- Dashboard tiles
- ROI reporting
- Conversion tracking
- Lead Source & Campaign filtering
- Business performance insights

6.2.5 Key Dates

This area contains important timeline information for the lead:

- **Created Date**
- **First Contact Date** (should be updated once first outreach happens)

Tracking first contact helps measure responsiveness and lead velocity.

6.2.6 Convert Lead to Client Workflow

At the bottom of the form, you can convert a lead into a client.

Convert this Lead to a Client?

You may select:

✓ Yes Convert

Copies all relevant lead details into a new **Client record**, reducing duplicate data entry.

❌ No

Keeps the record as a lead.

This workflow shifts the lead into the full client lifecycle.

6.2.7 Transfer Notes (After Lead Conversion)

If you choose Yes Convert during the Lead → Client conversion workflow, the system creates a new Client record from the lead.
However, notes do not transfer automatically — they must be transferred manually to preserve history.

To transfer notes, follow these steps:

Step 1 — Navigate Back to Leads

Use the left sidebar navigation and click:

Leads

This returns you to the main Leads Home Screen.

Step 2 — Search for the Converted Lead

Use the Search By Name fields (First or Last Name) to locate the lead that was just converted.

Converted leads remain visible on the Leads screen until archived or manually filtered out.

Step 3 — Open the Lead Record

Click the magnifying glass icon next to the lead.
This opens the Lead Input screen again so you can access the Notes tab.

Step 4 — Transfer Notes

At the bottom of the Lead Details tab, locate:

Transfer Notes → Transfer

Clicking Transfer moves all lead notes into the Client's Notes tab.

Why Transfer Notes?

Transferring notes ensures:

- A complete communication history
- Accurate documentation of conversations
- Better continuity during follow-ups
- Unified client record management

Best Practice:

It is strongly recommended that agents transfer notes immediately after conversion to avoid losing track of important history.

6.2.8 Scrolling & Layout

Because the Lead Input screen contains multiple sections, the right-hand scroll bar allows you to access:

- Key Dates
- Conversion options
- Notes tab
- Bottom-level controls

Screen size may hide certain fields until scrolled into view.

6.2.9 Save Lead

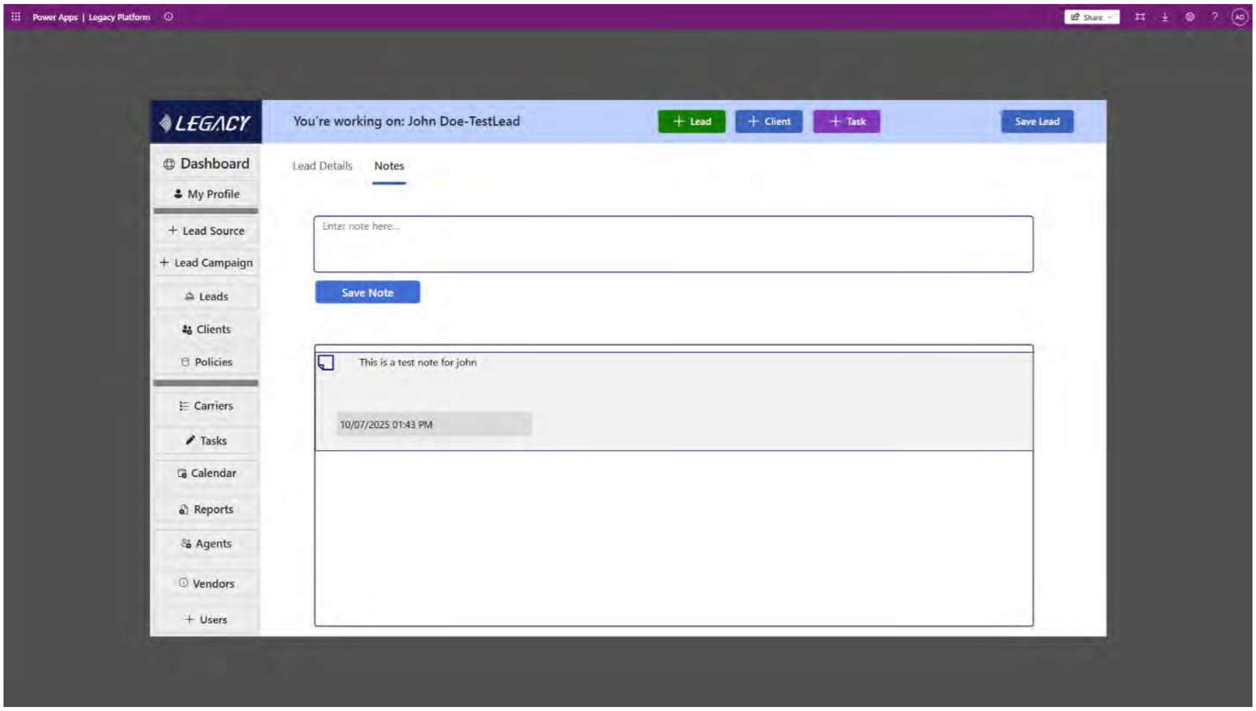
Always click **Save Lead** in the upper right to ensure all changes are recorded before navigating away.

6.3 Lead Notes Tab

The **Lead Notes** tab is used to record conversations, updates, follow-ups, and any information related to working a lead. Notes help maintain a complete history of communication so you can track the progress and context of every interaction.

Below is the Lead Notes tab:

Lead → Notes Tab



6.3.1 Header Bar – Lead Context

At the top of the screen, the CRM displays:

"You're working on: [Lead Name]"

This ensures you are viewing and entering notes for the correct lead.

The action buttons remain available:

- **+ Lead** – Add a new lead
- **+ Client** – Add a new client
- **+ Task** – Add a task related to this lead
- **Save Lead** – Save changes on the Lead Details tab (not required for notes)

6.3.2 Entering a New Note

At the top of the Notes tab is the **note entry field**, labeled:

"Enter note here…"

To add a new note:

1. Type your message in the note box
2. Click **Save Note**

The system will automatically:

- Stamp the **current date**
- Stamp the **current time**
- Identify the **user who created the note** (displayed in database and admin views)

New notes appear **at the top** of the notes list.

Common examples of Lead Notes:

- Call or voicemail attempts
- Follow-up reminders
- Email attempts
- Client objections
- Appointment confirmations
- Application progress
- Anything important to the sales process

6.3.3 Viewing Notes History

All saved notes appear in a **scrollable gallery** below the note entry area.

Each note card includes:

- The note text
- The timestamp
- A background block for readability
- An icon indicating the note type or user

Notes are displayed in **chronological order**, newest at the top.

Because this is a history of lead activity, **notes cannot be edited or deleted** by agents (depending on permissions). This ensures accurate and compliant history-tracking.

6.3.4 Scrolling Through Notes

If a lead has many notes, use the scroll bar on the right-hand side of the notes list to view older entries.

Scrolling is useful for:

- Reviewing long-term lead progress
- Preparing for follow-up calls
- Evaluating why a lead was or wasn't converted

6.3.5 Notes and Lead Conversion

When a lead is converted into a client:

- Notes **do not automatically transfer**
- Agents must manually transfer them using the **Transfer Notes** button on the Lead Details tab (see Section **6.2.7**)

After transfer, notes become part of the **Client Notes** history.

6.3.6 Best Practices for Lead Notes

To get the most value from this feature:

- Add notes after **every interaction**
- Document unsuccessful attempts (no answer, voicemail, SMS)
- Include important context for future follow-up
- Use clear, concise writing
- Add notes in real-time to avoid forgetting details

Notes play a critical role in both **compliance** and **conversion tracking**, making them one of the most important parts of the CRM workflow.

6.4 Bulk Lead Upload

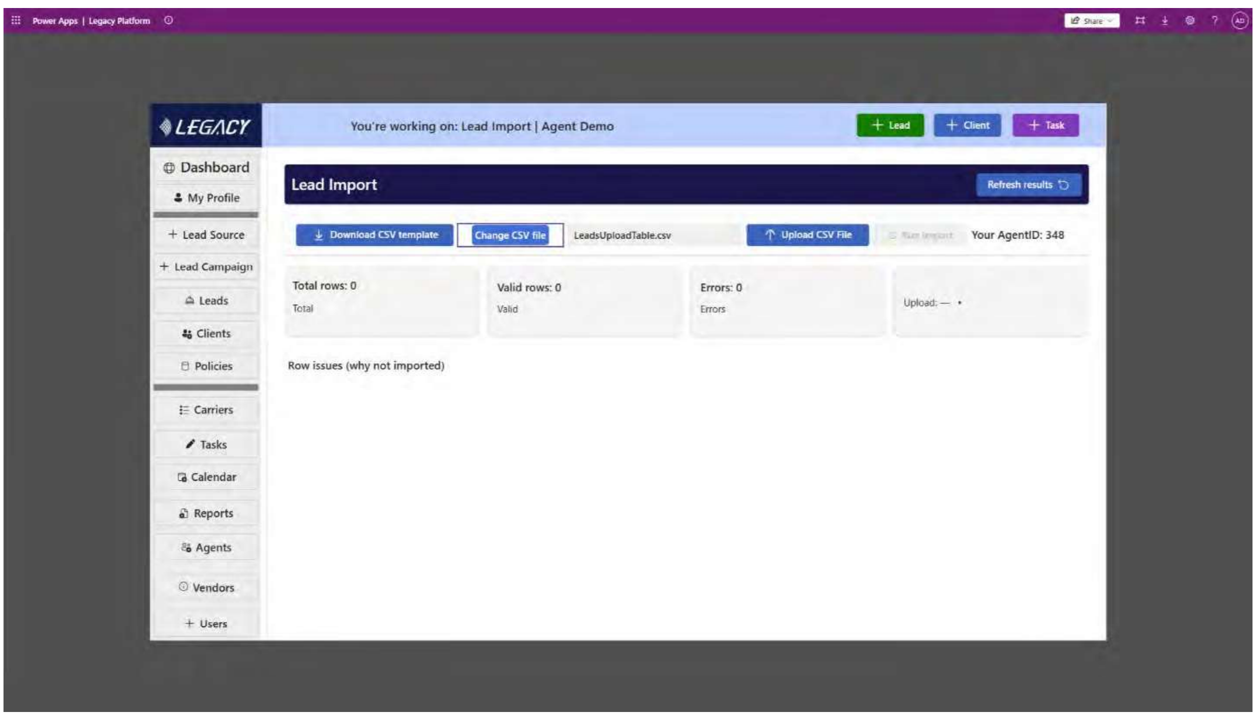
The **Bulk Lead Upload** feature allows agents to upload multiple leads at once using a CSV file. This is especially useful for:

- Vendor-delivered lead lists
- Purchased internet leads
- Aged leads
- Transfer leads from another CRM
- Weekly/Monthly marketing imports

Bulk uploading saves time, ensures accuracy, and automatically assigns the leads to you using your **AgentID**.

Below is the first part of the Lead Import screen:

Leads → Bulk Lead Upload – Upload Screen



6.4.1 Header Bar

The top of the screen shows:

"You're working on: Lead Import | Agent Demo"

This confirms that you are in the Lead Import module.
The standard action buttons remain accessible:

- **+ Lead** – Create a new lead
- **+ Client** – Create a new client

- **+ Task** – Add a task

These do not affect the upload but allow quick navigation if needed.

6.4.2 Step 1 — Download the CSV Template

Before uploading any leads, you **must** download the official CSV template:

Download CSV template

Click this button to download the file to your computer.

✔ Why this is critical

Lead vendors structure their CSV files differently. The CRM-AMS requires **specific column headers**, including:

- FirstName
- LastName
- Phone
- Email
- Address
- City
- State
- Zip
- Lead Source
- Market Type
- **AgentID** (important!)
  ... and other required fields.

If the column names do not match the required template exactly, the system will reject the upload.

✔ Best Practice

Always copy/paste your vendor leads **into the downloaded template** instead of trying to upload their file directly.

This ensures:

- Correct column names
- Correct ordering
- No hidden formatting issues

- No rejected rows
- Accurate assignment to you via **AgentID**

6.4.3 Step 2 — AgentID Display

Your unique **AgentID** is shown in the upper-right corner:

Your AgentID: 348 (example)

This is essential because:

- Each row in your CSV must include your **AgentID**
- This ensures the leads are assigned to YOU when imported
- Without it, the system will mark rows as invalid

If an agency uploads leads on your behalf, they must use **your AgentID** in the file.

6.4.4 Step 3 — Choose CSV File

Once your CSV is ready, click:

Change CSV file

This button allows you to browse your computer and select the CSV you prepared.

The selected file name will appear next to the button (e.g., LeadsUploadTable.csv).

6.4.5 Step 4 — Upload CSV File

After selecting your file, click:

Upload CSV File

This sends the file to the server for validation.

At this stage:

- No leads are imported yet
- The system checks column names
- It validates every row
- It prepares the summary on the next screen

You must click "Run Import" on the second screen to finalize the upload.

6.4.6 Summary Tiles (Before Import)

Before a file is uploaded, all metrics show **0**:

- **Total rows: 0** – How many rows are in your file
- **Valid rows: 0** – Rows ready to import
- **Errors: 0** – Rows with issues
- **Upload: —** – Timestamp of last upload

These will update once the file is uploaded and validated.

6.4.7 Row Issues (Why Not Imported)

This section will list any row-level errors after validation.

Typical issues include:

- Missing First Name or Last Name
- Missing AgentID
- Invalid State abbreviation
- Invalid date format
- Unrecognized Market Type
- Invalid Lead Source
- Phone number formatting errors
- Extra columns or renamed headers
- Blank required fields

These issues will appear on screen #2, which you will upload next.

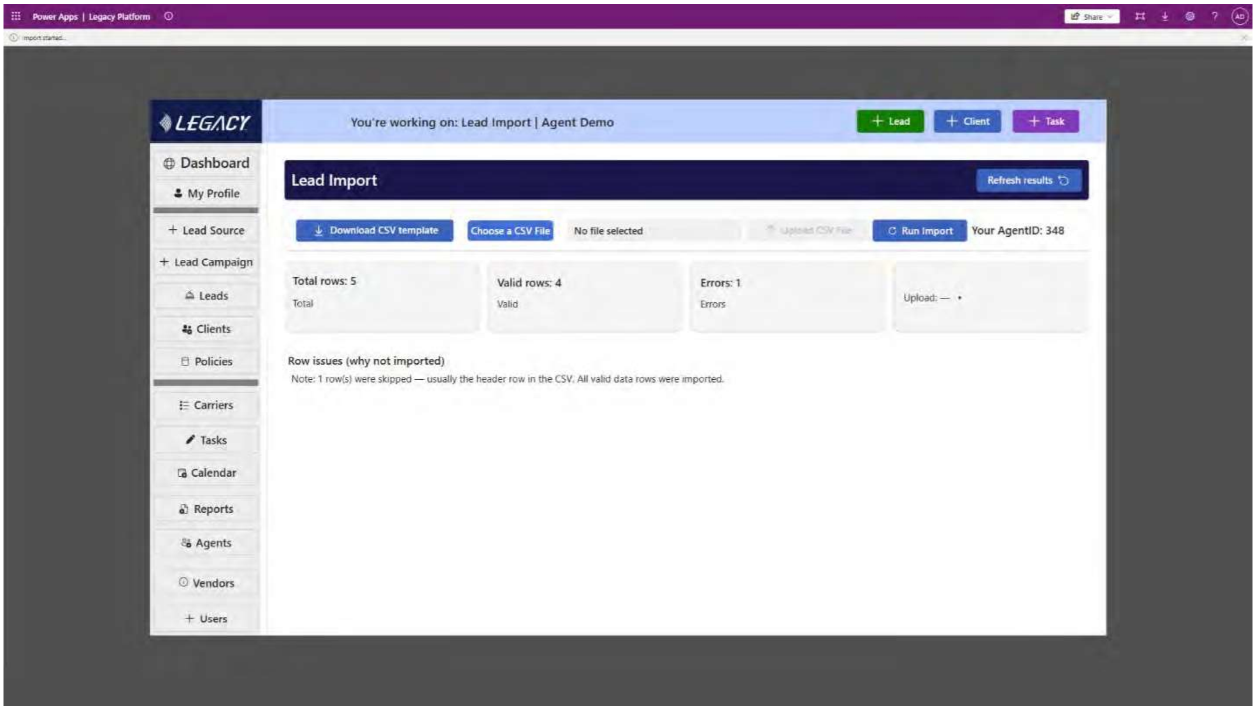
6.4 Bulk Lead Upload

The Bulk Lead Upload feature allows agents to load multiple leads at once from a CSV file. This is ideal when receiving leads from vendors, marketing platforms, or agency-provided lists. The upload tool validates the file, identifies errors, and safely imports the good rows into your Leads list.

6.4.1 Lead Import Screen Overview

Below is the Lead Import screen:

Leads → Lead Import (Bulk Upload)



6.4.2 Download the CSV Template

Before uploading any leads, you must download the system-provided template:

Download CSV Template

This is the official format accepted by the CRM-AMS.
The template contains required column headers such as:

- FirstName
- LastName
- Phone
- Email
- Address
- City
- State
- Zip
- MarketType
- LeadSource

- AgentID (critical)
- CreatedDate
- And other required fields

✓ IMPORTANT

Your CSV must match the column names exactly.
Any change (even spacing or capitalization) will cause errors or skipped rows.

✓ Best Practice

Always copy/paste your vendor leads into the downloaded template, not the other way around.

6.4.3 Your AgentID

Your unique AgentID appears in the upper right:

Your AgentID: 348 (example)

You must enter this ID into the AgentID column for every row.

This ensures:

- Leads upload to your account only
- Leads appear in your Lead list
- Dashboard tiles reflect your numbers
- Reports show correct ownership

If this field is missing or incorrect, the system will reject the row.

6.4.4 Select the CSV File

Click:

Choose a CSV File

Select the CSV you prepared.

The filename will appear next to the button (e.g., LeadsUploadTable.csv).

6.4.5 Upload CSV File

Click:

Upload CSV File

This uploads the file to the server for validation.

At this point:

- Leads are not yet imported
- The system checks formatting
- It reads every row
- It determines valid vs. invalid rows

The results appear on the next screen.

6.4.6 Validation Results (Screen #2)

Below is the validation results screen:

Lead Import – Validation Complete
File: /mnt/data/LeadUpload-2.png

This screen shows:

- Total rows (rows detected in the CSV)
- Valid rows (ready to import)
- Errors (rows with issues)
- Upload timestamp (after import is finalized)

Example from screenshot:

- Total rows: 5
- Valid rows: 4
- Errors: 1

6.4.7 Understanding the "1 row skipped" message

The Row Issues section may display a message like:

"1 row(s) were skipped — usually the header row in the CSV. All valid data rows were imported."

This usually indicates:

- The header row was excluded (expected behavior), or
- One row had invalid or missing data

If the skipped row was the header, this is normal.

If it was a real row, you will need to check the CSV for:

- Missing First/Last Name

- Missing AgentID
- Invalid date formats
- Invalid Lead Source or Market Type
- Mistyped column names
- Empty required fields

6.4.8 Row Issues (Why Not Imported)

This section lists problematic rows and explains why they failed validation.

Common row-level errors include:

- Missing First Name or Last Name
- Missing AgentID
- Invalid State abbreviation
- Invalid phone formatting
- Invalid Lead Source / Market Type
- Extra columns in the CSV
- Blank required fields
- Incorrect date formatting

Fix these in your CSV and re-upload if necessary.

6.4.9 Run Import (Final Step)

After validation, click:

Run Import

This finalizes the upload and writes the valid rows into:

- tblLeads
- Your Lead list in the CRM
- Your lead-related Dashboard tiles
- Reporting tables

✓ IMPORTANT

Your leads are not imported until you click Run Import.

6.4.10 Refresh Results

The Refresh results button reloads the summary tiles and confirms the import:

- Upload timestamp
- Valid row count
- Error count

Use this after clicking Run Import to verify everything processed correctly.

6.4.11 After Importing Leads

Once the import is complete:

- Navigate back to Leads
- Review your newly imported leads
- Sort or filter as needed
- Open any lead using the magnifying glass
- Begin working your leads immediately

6.4.12 Best Practices for Bulk Lead Upload

- Always use the official CSV template
- Insert your AgentID in every row
- Ensure phone numbers use consistent formatting
- Use valid State abbreviations (MI, CA, TX, etc.)
- Use valid Market Types and Lead Sources
- Do not rename or remove required columns
- Avoid blank rows
- Save as CSV UTF-8 (recommended)

6.4.13 Troubleshooting

Issue	Cause	Fix
“0 valid rows”	**Wrong column headers**	**Re-download template**
“Row skipped”	**Missing required data**	**Fix row and re-upload**
AgentID missing	**Leads have no owner**	**Add your AgentID**

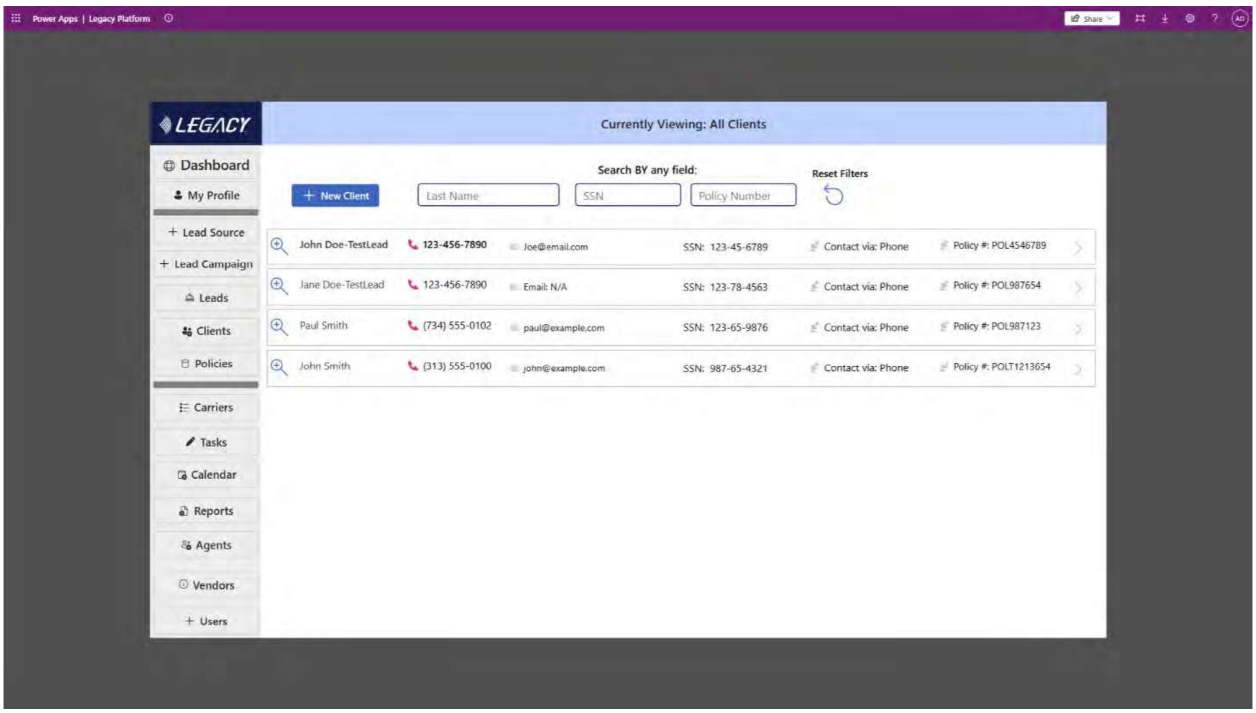
Invalid Market Type	**Vendor name mismatch**	**Use dropdown values**
Incorrect date format	**Vendor uses MM-DD-YY**	**Change to YYYY-MM-DD**

7. Clients

The Clients section gives agents access to their full book of business. From here, you can search, filter, and open client records, view contact information at a glance, and navigate directly to client details and policies.

Below is the Clients Home Screen:

Clients → Home Screen



7.1 Clients Home Screen

The **Clients Home Screen** displays your active client list along with tools to quickly find any client by name, SSN, or policy number. You can open any client record using the magnifying glass icon.

This screen is also where you manually add new clients (in cases where they are not converted from leads).

7.1.1 Header Section

At the top of the screen, the system displays:

"Currently Viewing: All Clients"

This label reminds you that the list is showing all clients assigned to you.

7.1.2 + New Client Button

Click **+ New Client** to manually create a new client record.
You may use this when:

- A client was never entered as a lead
- A walk-in or direct referral becomes a client
- You're adding existing book-of-business clients during onboarding

Clicking this button opens the **Client Detail Page** immediately.

7.1.3 Search By Any Field

This powerful search bar allows you to find clients using multiple identifiers.

You can search by:

- **Last Name**
- **SSN**
- **Policy Number**

All fields filter the list immediately as you type.

Why this matters:

- Quickly locate a client when you have partial information
- Look up policies when clients call
- Match incoming service requests with existing records
- Identify a client by SSN if names are similar or duplicated

---

7.1.4 Reset Filters Button

The **reset icon (↻)** clears all search fields and restores the full client list instantly.

Use this whenever:

- You performed multiple searches
- You want to return to the full list
- You need to restart your lookup

7.1.5 Clients Gallery (Client List)

Each row in the client list displays key information at a glance.

Left Side – Open Client Button

Each row begins with a **magnifying glass icon**.

Clicking it opens the full **Client Detail Page**, where you can:

- View/Edit personal information
- View policies
- Add policies
- Add notes
- View household data
- Upload documents

This is the primary way to open a client record.

Client Name (Large Text)

Displayed prominently for quick scanning.

Phone Number (with phone icon)

Displayed next to the name.

Helps you locate clients quickly when calling to confirm appointments, follow-ups, policy reviews, or tasks.

Email Address (if available)

Shows below the phone number.

SSN (masked for security)

Example: SSN: 123-45-6789

This is extremely helpful when clients share similar names.

Contact Preference

Displayed as:

- **Contact via: Phone**
- Contact via: Email
- Contact via: SMS (if enabled)

This helps avoid contacting clients through unwanted channels.

Primary Policy Number (Right side)

Shows the client's **primary or most recent policy number**, which may be:

- Life insurance
- Annuity
- Mortgage protection
- Debt elimination
- Or any policy type you support

Clicking the **arrow (>)** takes you directly to the **Client Detail Page**.

7.1.6 Scrolling Through Clients

If you have more clients than can fit on the screen, use the vertical scroll bar to view more.

Scroll to:

- View older clients
- Compare multiple clients
- Navigate full books of business
- Locate recently added clients

Scrolling does not affect search or sort.

7.1.7 Best Practices

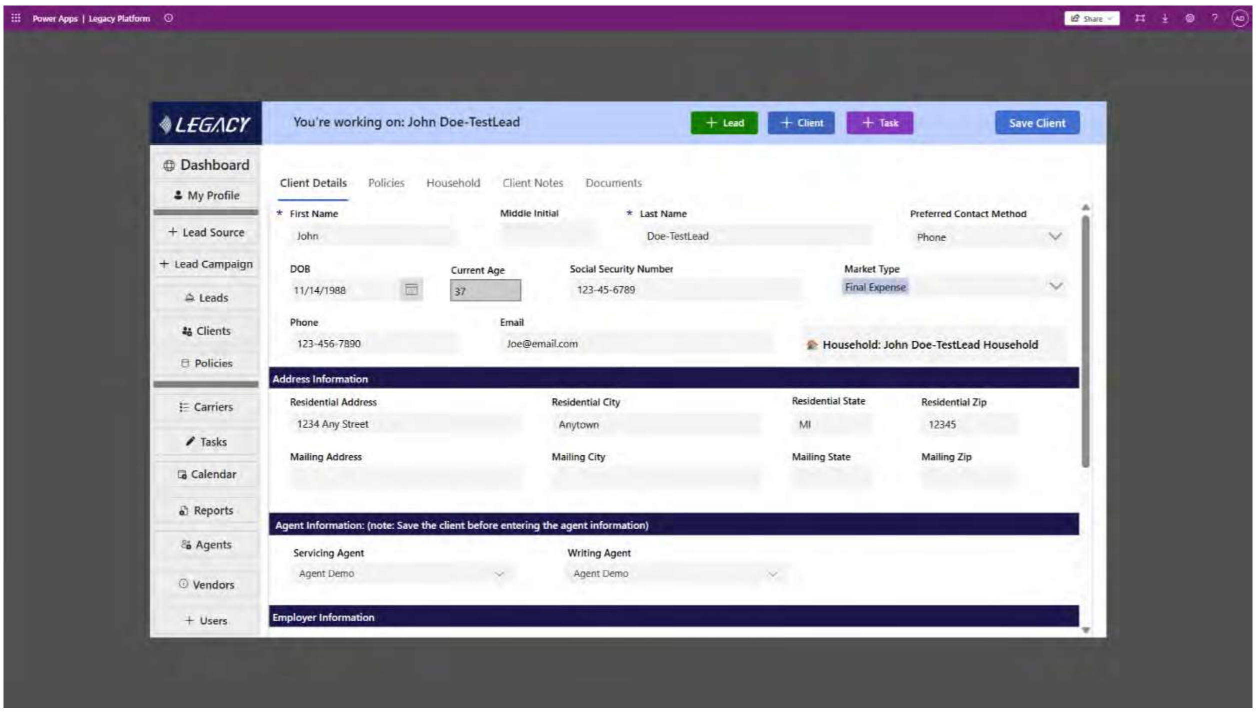
- Always search by **last name** when uncertain
- Use **SSN** when clients share similar names
- Use **policy number** for service requests
- Reset filters between lookups for clean results
- Open clients using the **magnifying glass** to avoid clicking in the wrong row

7.2 Client Details Tab

The **Client Details** tab is where all primary information about the client is stored and maintained. This includes personal data, contact preferences, address information, household structure, and agent assignments. The details in this tab are the foundation for all downstream policy records, tasks, notes, and reporting.

Below is the Client Details tab:

Clients → Client Details



7.2.1 Header Bar

At the top of the client form, the system displays:

"You're working on: [Client Name]"

This confirms which client record you are actively editing.

To the right are the universal action buttons:

- **+ Lead** – Add a new lead
- **+ Client** – Create a new client
- **+ Task** – Create a task linked to the client
- **Save Client** – Saves all updates made to this client

These quick action buttons allow you to take immediate steps from anywhere in the form.

7.2.2 Client Tab Navigation

Just below the header are the client-level tabs:

- **Client Details**
- **Policies**
- **Household**
- **Client Notes**
- **Documents**

This section (7.2) focuses only on **Client Details**.
The remaining tabs will be covered in Sections 7.3 through 7.5.

7.2.3 Personal Information

This section includes all primary identifying fields:

- **First Name***
- Middle Initial
- **Last Name***
- **DOB (Date of Birth)**
- **Current Age** (auto-calculated from DOB)
- **Social Security Number**
- Phone
- Email
- **Preferred Contact Method** (Phone, Email, SMS etc.)
- **Market Type** (Final Expense, Mortgage Protection, Debt Elimination, etc.)

Auto-Calculated Age

The **Current Age** field automatically updates based on the DOB provided.
This helps avoid mistakes when completing applications or quoting policies.

7.2.4 Household Association

To the right side of the personal information section is the **Household button**, labeled:

🏠 **Household: [Household Name]**

Clicking this button will take you to the **Household Tab** (Section 7.4) where you can:

- Assign additional family members

- Build multi-client households
- Track relationships
- Share addresses between clients
- Organize policy lists per household

7.2.5 Address Information

Both residential and mailing addresses can be stored. This includes:

Residential Address

- Street
- City
- State
- Zip

Mailing Address

(If different from residential)

- Street
- City
- State
- Zip

This section ensures the client's legal and mailing addresses are properly recorded for applications, carrier communication, and reporting.

7.2.6 Agent Information

This section identifies which agents are assigned to this client.

Servicing Agent

The agent responsible for:

- Ongoing client support
- Policy maintenance
- Annual reviews
- Customer service

Writing Agent

The agent responsible for:

- Writing the original application
- New business submission
- Earning commissions on the policy

These two roles may be the same or different depending on agency structure.

⚠ Important Note

The banner under this section indicates:

"Save the client before entering the agent information."

This means the client must be saved at least once before the agent dropdowns become fully functional and linked to the database.

7.2.7 Employer Information

(Visible at the bottom of the form)

This section stores optional but helpful employer data:

- Employer Name
- Employer Phone
- Employer Address

This information is useful for:

- Worksite scheduling
- Follow-up contact
- Verifying employment for certain products

7.2.8 Scrolling & Layout

Because the Client Details tab contains multiple sections, agents may need to use the scroll bar on the right to access:

- Agent Information
- Employer Information
- Additional fields below
- Household access
- Save Client button (if screen size is small)

Scrolling only affects form layout—no data is hidden or collapsed.

7.2.9 Saving the Client Record

After making any updates, always click:

Save Client

This ensures all edits are committed before moving to:

- Policies tab
- Household tab
- Client Notes
- Documents
- Another client record

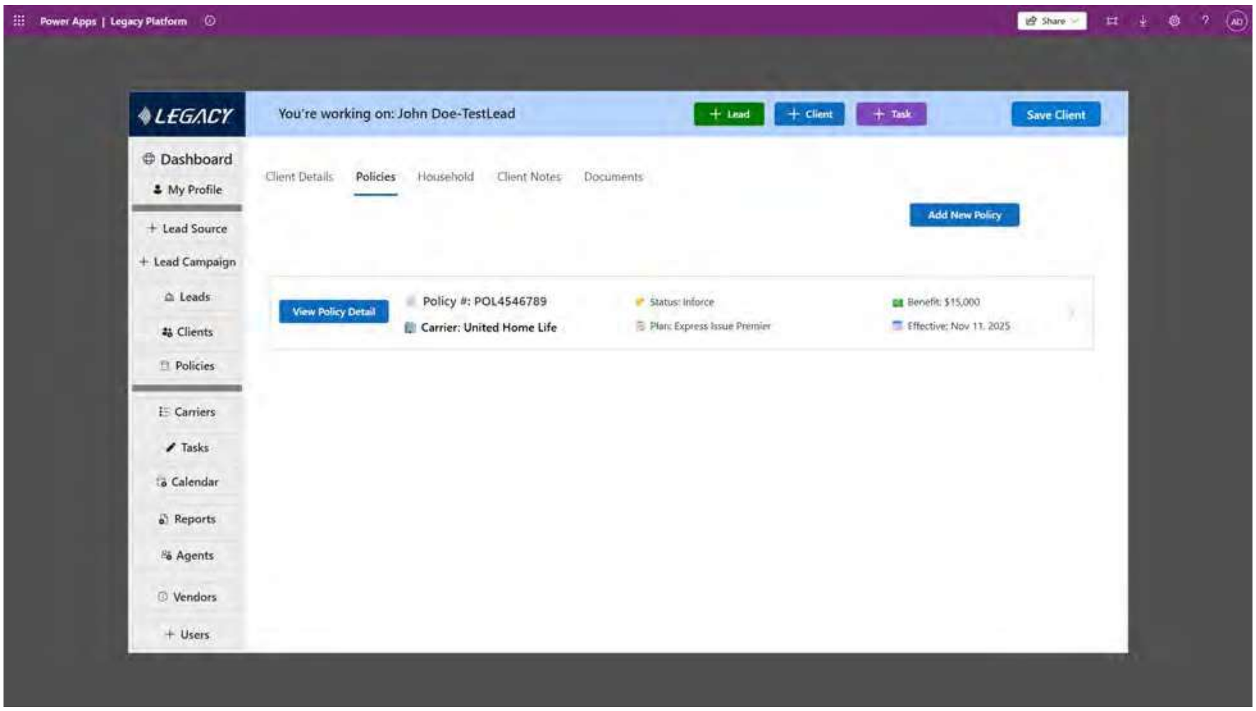
If you navigate away without saving, unsaved changes will be lost.

7.3 Policies Tab

The **Policies** tab displays all insurance policies associated with the selected client. This is where agents can view policy summaries, open policy detail screens, and add new policies to the client's record.

Below is the Policies tab:

Client → Policies Tab



7.3.1 Overview

The Policies tab provides a clean, organized list of every policy tied to the client. Each policy appears in its own row card and includes the most essential information for quick review:

- Policy number
- Carrier
- Plan name
- Status (e.g. Inforce, Pending, Declined, Cancelled)
- Benefit amount
- Effective date

The Policies tab helps you quickly identify the client's active coverage and access more detailed policy information when needed.

7.3.2 Add New Policy

On the right side of the Policies tab is the **Add New Policy** button.

Clicking Add New Policy:

- Opens the **Policy Input Screen**
- Allows you to add a new policy for this client
- Supports all product types (FE, MP, DL, IUL, Annuity, etc.)
- Automatically links the policy to the current client

This button is used when:

- Submitting new business
- Adding previously written business
- Logging transferred policies
- Adding legacy book-of-business policies

7.3.3 Policy Gallery (Policy List)

Each policy is shown in a horizontal row card.
A typical policy card includes:

View Policy Detail Button

Located on the left side of the card:

- Opens the **full Policy Detail screen**
- Allows editing, adding notes, updating status, and reviewing dates

This is the primary tool for updating and maintaining policy data.

Policy Number

Displayed next to the policy icon:

- Example: **POL4546789**
- Important for carrier lookups, service requests, and reporting

---

Carrier

Displays the issuing carrier:

- Example: **United Home Life**

Carrier information helps you quickly identify where the policy originated.

Plan Name

Displayed under the policy details:

- Example: **Express Issue Premier**
- Indicates the specific product within the carrier's lineup

This is extremely useful when a carrier offers multiple versions of a plan.

Status

Example:

- **Inforce** (active policy)
- Pending
- Not Taken
- Cancelled
- Declined
- Replaced

Status ties directly into:

- Policy review workflows
- Dashboard metrics
- Reporting
- Client management

Benefit Amount

Shown with a green icon:

- Example: **$15,000**

Indicates face amount or death benefit tied to the plan.

Effective Date

Displayed with a calendar icon:

- Example: **Effective: Nov 11, 2025**

This date impacts:

- Review scheduling
- Renewal cycles
- Dashboard metrics

Arrow Navigation (>)

Located at the far right of each policy row.

Clicking it:

- Opens the **Policy Detail** page
- Allows reviewing or editing policy fields
- Provides access to policy-specific notes
- Shows premium information
- Displays status change history

7.3.4 Multiple Policies

If a client has **more than one policy**, all will appear in this list.

Examples include:

- A Final Expense + Mortgage Protection combo
- Multiple FE policies for multiple household members
- Annuity + IUL
- Policy rewrites

The Policies tab helps agents keep track of all coverage in one place.

7.3.5 Scrolling Through Policies

If a client has many policies, the tab supports vertical scrolling so you can view the full list.

Scroll to:

- Review older policies
- Compare multiple policy types
- Access all policies before opening the next tab

7.3.6 Best Practices

- Always check **Status** before completing client follow-ups
- Use **View Policy Detail** to verify dates when preparing for policy reviews
- Add policies immediately after writing new business
- Keep benefit amounts accurate for proper reporting
- Update status (Inforce, Pending, Declined) as carrier updates come in
- Use concise, accurate plan names for clarity

7.4 Household Tab

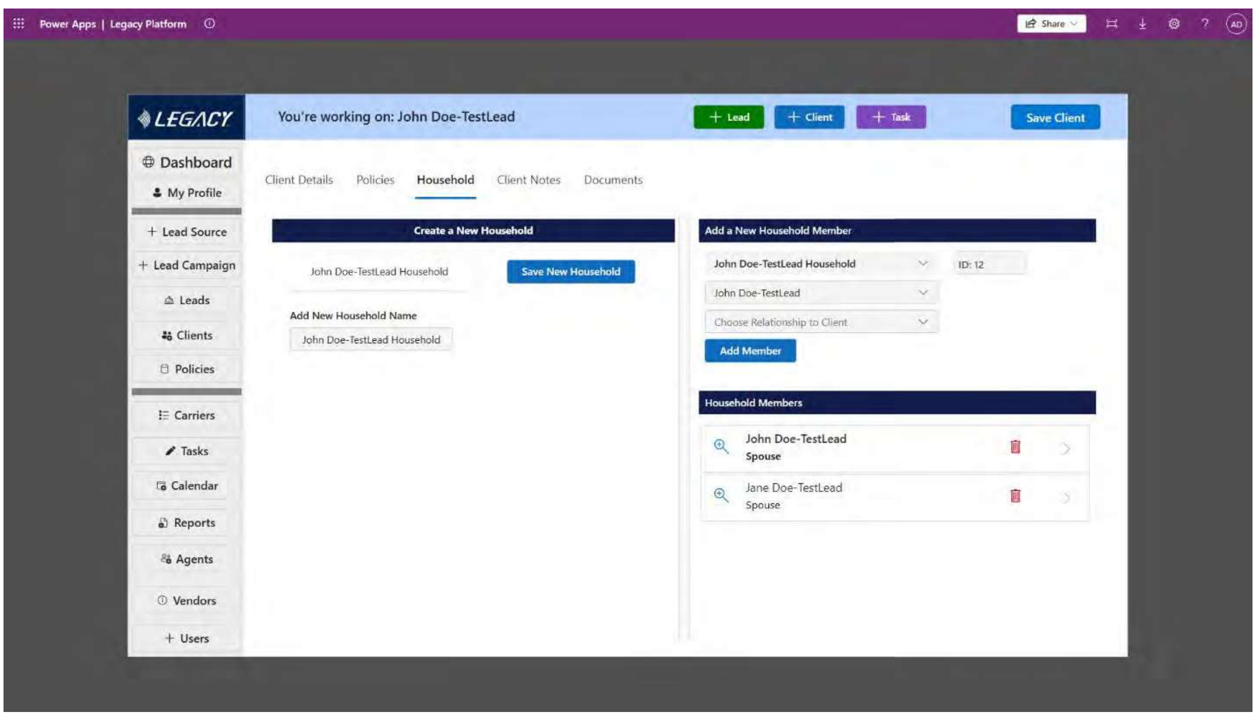
The **Household** tab allows you to group related clients into a single household unit. This makes it easy to:

- Track families
- Store spouse/child relationships
- Link multiple clients at the same address
- Share household names
- Navigate quickly between members

The Household tab is a powerful organizational tool for managing multi-policy families and building complete client profiles.

Below is the Household tab:

Client → Household Tab



7.4.1 Household Overview

The layout is divided into two main sections:

Left Panel

- Create and name a new household
- Save household assignments

Right Panel

- Add members to the household
- Choose relationships
- View the household member list
- Navigate to any member's Client Details
- Remove members from the household

7.4.2 Creating a New Household

At the top-left is the **Create a New Household** section.

Household Name

The system auto-suggests a default household name using the client's name, e.g.:

John Doe-TestLead Household

You may edit this before saving.

Save New Household

Click to:

- Create the household
- Assign the current client as the first household member
- Enable household member management tools

A client can only belong to **one household**, and saving it locks them into that household group.

7.4.3 Add New Household Name (Edit Name)

You can rename an existing household at any time by editing the text box under:

Add New Household Name

Then click **Save New Household** again to update it.

7.4.4 Add a New Household Member (Right Panel)

This section allows you to add additional clients into the same household.

You must select:

1. **Household –** Already chosen for you
2. **Client –** Dropdown listing all clients in the system

3. **Relationship to Client** – e.g.:
    - Spouse
    - Child
    - Parent
    - Sibling
    - Partner
    - Other
4. **Add Member –** Saves the new household relationship

When saved, the new individual appears in the **Household Members** list below.

7.4.5 Household Members List

Every member of the household is displayed in a list, each with:

✓ Magnifying Glass Icon

Clicking this icon opens the **Client Details** for that specific household member.

✓ Dynamic Header Update

When clicking the magnifying glass:

- The CRM switches the active record
- The header updates to show the selected member:
  "You're working on: [Client Name]"
- All tabs (Policies, Notes, Documents) now reflect that person's data

This makes it extremely fast to switch between household members.

✓ Name + Relationship

Each row shows:

- Client Name
- Relationship (e.g., Spouse, Child)

✓ Delete Icon (Trash Can)

Removes that member from the household.
This does **not** delete the client — only removes the link to the household.

7.4.6 Real-World Use Cases

💬 **Insurance Families**

Spouse + children + policies under one household.

💬 **Multi-policy Clients**

Clients may have:

- FE policy for them
- Mortgage policy on spouse
- Annuity for parent living with them

Easily accessed through Household navigation.

💬 **Client Review Meetings**

When doing annual reviews, you can jump between all members in a household from a single screen.

💬 **Agency Organization**

Helps agencies stay compliant by clearly tracking relationships within a client unit.

7.4.7 Best Practices

- Always create a household when working with families
- Keep household names neat and consistent
- Use the magnifying glass to navigate quickly
- Always verify that the header matches the person you intend to update
- Add relationships when converting multiple leads in the same family
- Remove former household members only when necessary

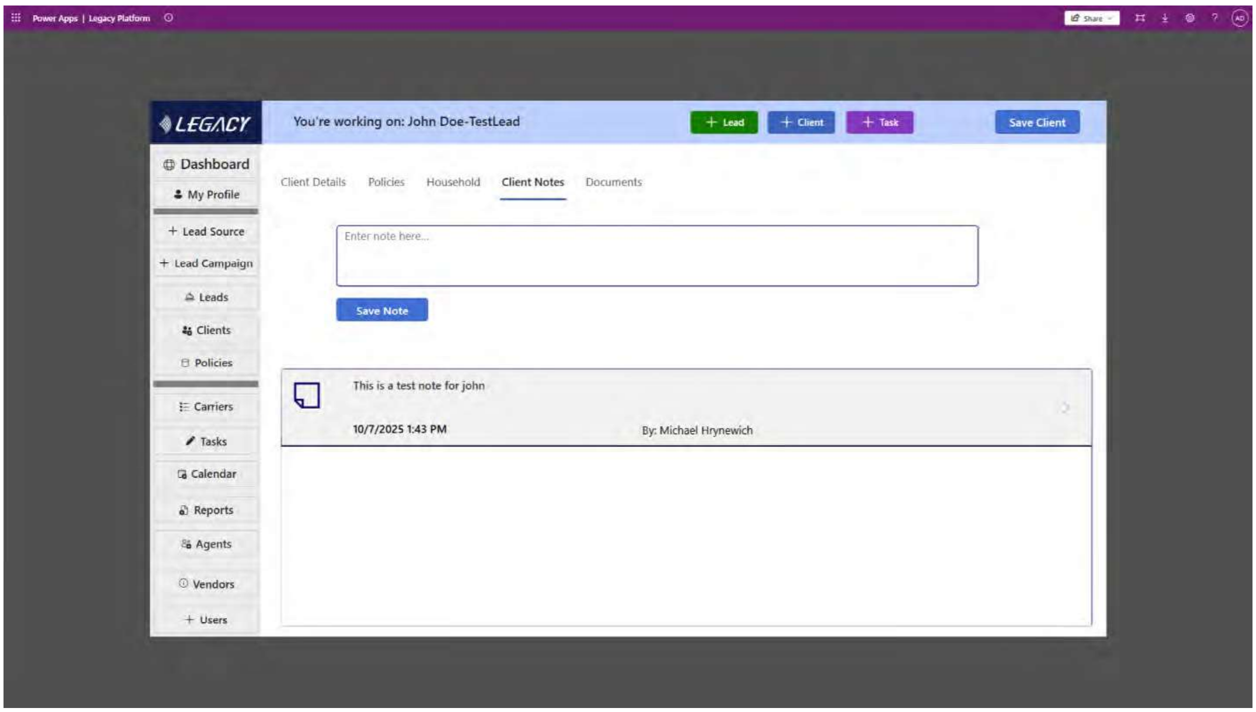
7.5 Client Notes Tab

The **Client Notes** tab is where you record ongoing client interactions, activity summaries, follow-up details, appointment notes, and important pieces of information gathered during calls, meetings, or policy reviews.

This tab is essential for maintaining a complete and accurate history of all client communications.

Below is the Client Notes tab:

Client → Client Notes Tab



7.5.1 Adding a New Client Note

At the top of the screen is a large text box labeled:

"Enter note here..."

This is where you type your new note.

To add a note:

1. Type your note into the text field.
2. Click **Save Note**.

Once saved:

- The note instantly appears in the notes history below.
- A timestamp is automatically added.
- The system records **your name** as the author of the note.

This ensures every note is permanently attributed to the correct user.

7.5.2 Notes History

All previously saved notes appear in a scrollable history section.

Each note displays:

✓ Note Text

The full text of the saved note.

✓ Timestamp

Shown as *Date* + *Time*, e.g.:

10/7/2025 1:43 PM

✓ Author (Created By)

The system shows who entered the note, e.g.:

By: Michael Hrynewich

This is important for team environments where agencies or admin staff may also work with your clients.

7.5.3 Note Layout & Visual Indicators

Each note is displayed inside a clean, structured card that includes:

- A small **note icon** on the left
- The note text
- Timestamp at the bottom-left
- Author at the bottom-right
- A **chevron arrow** on the right for future expansion (optional future features like note detail view or editing)

This card layout keeps the history visually organized and easy to scan.

7.5.4 Navigation Reminder

At the top of the screen, the header shows:

“You’re working on: [Client Name]”

This confirms you are adding notes to the correct client record.
If you previously jumped between household members using the magnifying glass icon, always confirm that the header reflects the correct client before adding notes.

7.5.5 Best Practices for Client Notes

- Add notes **immediately** after each client interaction.
- Be concise but detailed enough for future reference.
- Always include context, such as:
    - "Left voicemail"
    - "Completed birthday review"
    - "Discussed moving FE policy to new carrier"
    - "Scheduled follow-up for next Tuesday"
- Avoid including any sensitive information that is not needed for business purposes (e.g., full credit card numbers).
- Use notes to document progress toward policy reviews, birthdays, and other dashboard-driven reminders.
- When converting a Lead to a Client, always transfer notes (handled automatically during Lead Conversion).

7.6 Documents Tab

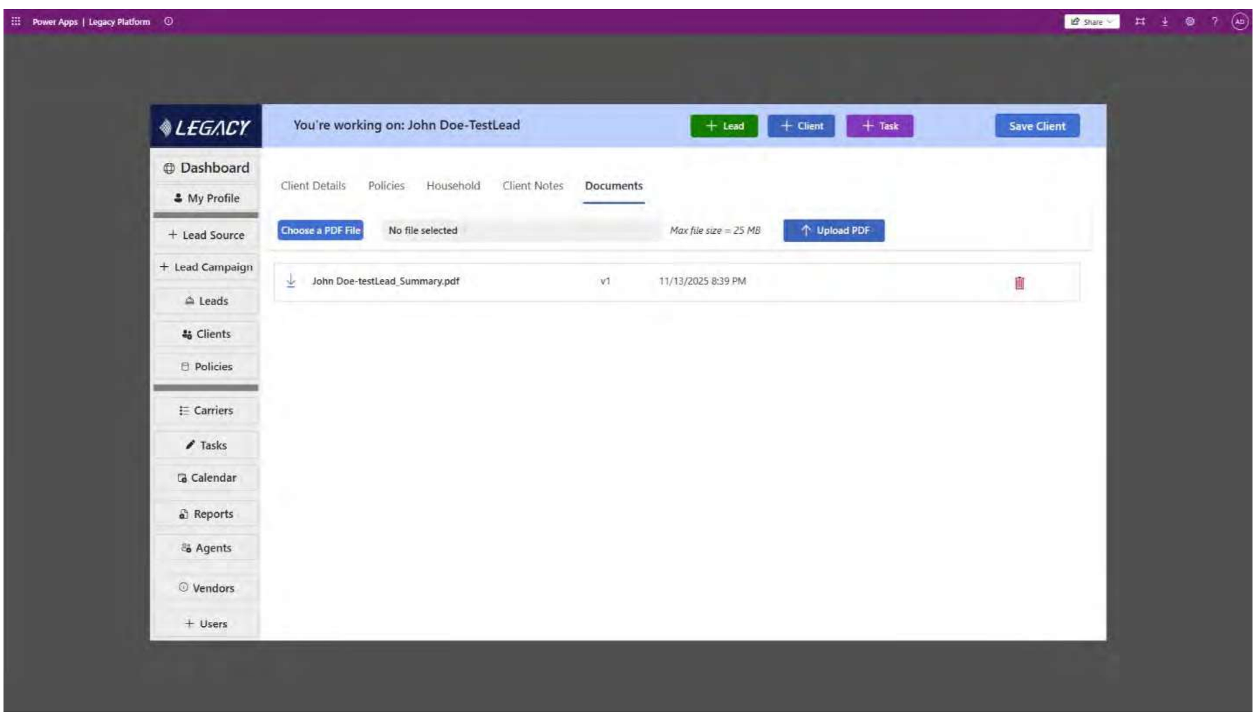
The **Documents** tab allows you to store, view, download, and manage important client files in one centralized location. This includes:

- Policy summaries
- Signed applications
- Scope of Appointment forms
- Medical documents (non-PHI)
- Lead sheets
- Client review PDFs
- Any other relevant PDF-based documentation

Documents uploaded here become part of the client's permanent digital record inside Legacy CRM-AMS.

Below is the Documents tab:

Client → Documents Tab



7.6.1 Uploading a PDF Document

At the top of the screen is the file upload section with the following controls:

Choose a PDF File

- Opens your local device's file picker

- Accepts **PDF files only**
- Displays the selected filename immediately after choosing it

Max File Size = 25 MB

- A helpful limit indicator
- Prevents accidental uploads of oversized client documents

Upload PDF

After choosing a PDF:

1. Click **Upload PDF**
2. The document is uploaded to secure Azure storage
3. A new entry appears in the documents gallery below

All documents are stored securely and tied directly to the selected client.

7.6.2 Document List (File Gallery)

Each uploaded PDF appears in the list below the upload area.
Each file row contains:

✓ Download Icon

A downward arrow that instantly downloads the PDF.
Useful for reviewing forms like:

- Med sheets
- eApp summaries
- Prior carrier documents
- Client annual review packets

✓ Document Name

The filename you uploaded, such as:

John Doe-testLead_Summary.pdf

You can use meaningful naming conventions like:

- FE-Application-Nov2025.pdf
- BirthdayReview-Smith.pdf
- PolicyReplacementForm-UHL.pdf

✓ Version Number (v1, v2, v3, ...)

Every time you upload a file with the **same name**, the system increments the version number.

Example:

- First upload → v1
- Second upload → v2 (with same name)
- Third upload → v3

This helps maintain historical accuracy and prevents overwritten files.

✓ Upload Timestamp

Shows the exact date and time the document was added.

Example:

11/13/2025 8:39 PM

This is especially helpful for compliance and auditing.

✓ Delete (Trash Can Icon)

Removes the PDF from the client's file list.
This does **not** affect other client data.
Use with caution—deleted files cannot be recovered.

7.6.3 How the Documents Tab Helps Agents

The Documents tab eliminates the frustration of hunting through email threads, desktop folders, or text messages to find files.
Agents benefit from:

✓ Faster follow-up

Documents are instantly available during client calls or reviews.

✓ Better compliance

Files such as SOAs and signed forms remain tied to the client permanently.

✓ Cleaner workflow

Multiple versions of the same document remain organized through built-in versioning.

✓ Secure storage

No more storing compliance-sensitive files on local devices.

7.6.4 Best Practices for Using the Documents Tab

- Always upload PDFs immediately after completing an application or review
- Use clear file naming conventions

- Keep client records clean by deleting outdated or duplicate files
- For multi-policy households, upload documents to each client as appropriate
- Use the built-in versioning instead of overwriting older files
- Do not upload image files, zipped documents, or offline file bundles—PDF only

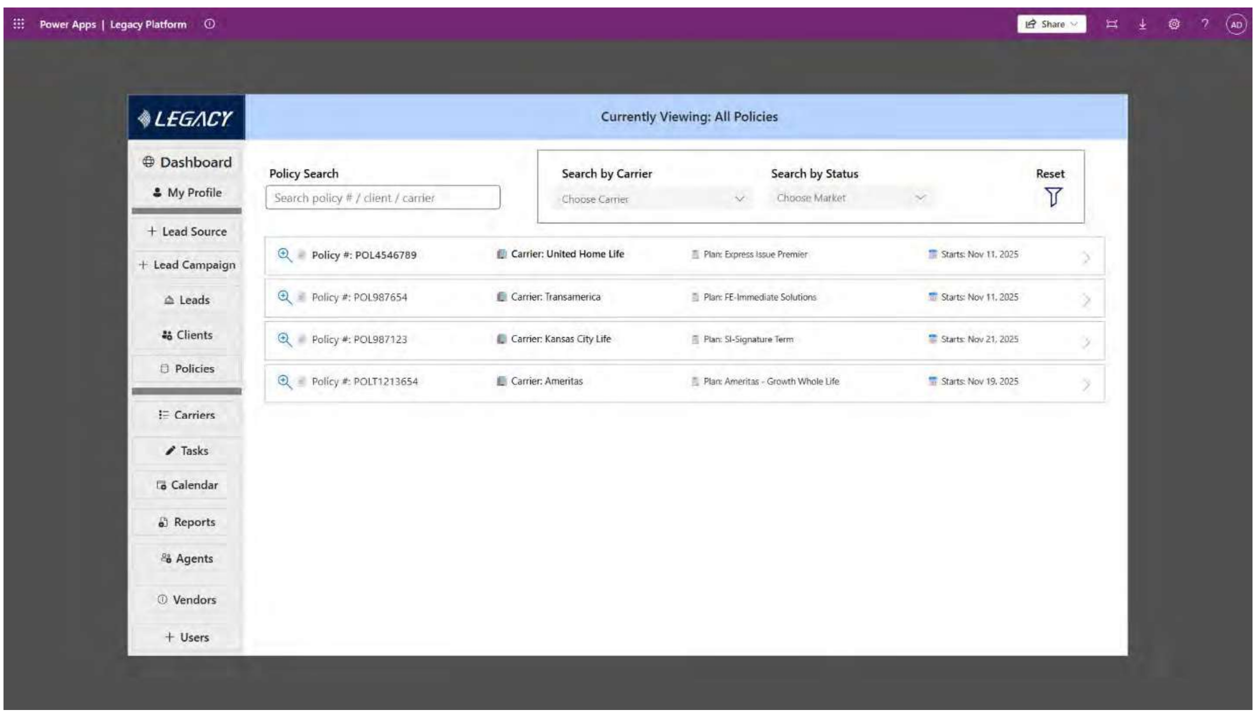
---

8.1 Policies Home Screen

The **Policies Home Screen** provides a consolidated view of every active, pending, or in-force policy assigned to you as an agent. This screen is designed to give you quick access to policy information, client details, and carrier data — all from one place.

Below is the Policies Home Screen:

Policies → Main Screen



8.1.1 Policy Search

At the top-left, you will see the main **Policy Search** input box:

Search Policy # / Client / Carrier

This search bar supports multiple search types at once:

- **Policy Number**
- **Client Name** (first or last)
- **Carrier Name**

- **Plan Name**

As you type, the list below automatically filters to match your search.

This makes it easy to quickly locate a specific policy, especially when working with large books of business.

8.1.2 Search by Carrier

The dropdown labeled **“Choose Carrier”** lets you instantly filter policies by the issuing insurance carrier.

Examples:

- United Home Life
- Transamerica
- Kansas City Life
- Ameritas

This filter is extremely useful when preparing:

- Carrier-specific reports
- Annual production summaries
- Appointment or license audits
- Carrier portal updates

8.1.3 Search by Status (Market Type)

The next dropdown, **“Choose Market”**, filters all policies based on the **Market Type**, such as:

- Final Expense
- Mortgage Protection
- Term
- Whole Life
- Annuities
- Income Replacement

This is the same Market Type used throughout the CRM-AMS and ties directly into reporting and dashboard analytics.

8.1.4 Reset Filters

The **Reset** button (filter icon) clears all search fields and dropdown selections.

This instantly restores the full, unfiltered policy list.

8.1.5 Policy List

Each policy appears as its own row, displaying:

✓ Magnifying Glass Icon

This icon is extremely important.

Clicking the magnifying glass opens the Client Detail page for the client associated with that policy.

This allows you to:

- View client information
- Review their household
- Check notes
- Access documents
- Add additional policies

It is one of the fastest ways to jump directly from a policy to the client it belongs to.

✓ Policy Number

Example: **POL4546789**
Each policy number is clearly labeled for quick identification.

✓ Carrier

Example:
Carrier: United Home Life
Carrier: Transamerica

✓ Plan Name

Displays the specific product:

- Express Issue Premier
- FE–Immediate Solutions
- SI Signature Term
- Growth Whole Life

This helps agents confirm the exact product sold.

✓ Effective Date

On the far right side, the effective date displays with a small calendar icon.

Example:
Starts: Nov 11, 2025

This date also ties into dashboard **Policy Reviews**, **Important Dates**, and **Production tracking**.

8.1.6 Scrolling Through Policies

If you have more policies than fit on the screen, a vertical scrollbar appears on the right.

This lets you scroll through long policy lists without losing access to the search filters.

8.1.7 Best Practices

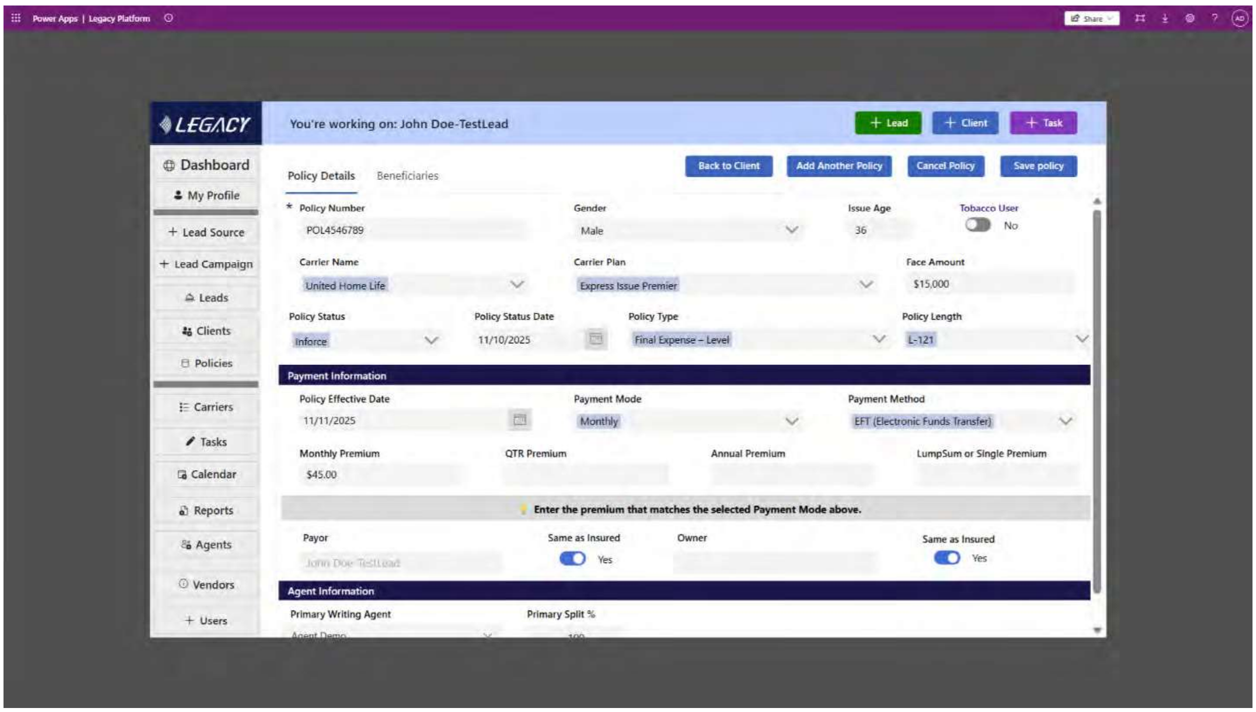
- Use the magnifying glass to quickly get to the **Client Detail** page.
- Filter by carrier when doing appointment or contracting reviews.
- Use Market Type to study your personal production mix.
- Always reset filters after running detailed searches.
- Use the search bar for fast recall of policy numbers and clients.

8.2 Adding a Policy

When you sell a new policy or need to enter an existing one, the **Add Policy** screen (frmPolicyInput) allows you to capture all relevant policy information in a clean, structured layout. This ensures accurate tracking, proper reporting, and seamless integration with dashboards and client summaries.

Below is the Policy Details screen:

Policies → Add Policy / Policy Details Tab



8.2.1 Policy Header & Navigation Buttons

At the top of the screen are several important action buttons:

+ Lead / + Client / + Task

Quick-access shortcuts to create new items from anywhere in the system.

Back to Client

Returns you to the Client Detail page.

Add Another Policy

Saves the current policy (if valid), clears the form, and immediately opens a fresh policy entry form.

Cancel Policy

Cancels the current policy entry.

Save Policy

This is the MOST critical step.
You must **Save Policy** before leaving the screen or entering beneficiaries.

⚠️ **Beneficiaries cannot be added until the policy is saved.**
Saving generates the PolicyID required to attach beneficiary records.

8.2.2 Policy Details Section

This upper section captures core policy data.

Policy Number *(required)*

Enter exactly as shown on the carrier documents.

Gender

Select Male or Female.

Issue Age

The carrier-defined age at issue.

Carrier Name

Dropdown list of all active carriers in your system.

Carrier Plan

List of all products offered by that carrier.

Face Amount

The insured amount (example: $15,000).

Policy Status

Common values include:

- Application
- Pending
- Inforce
- Declined
- Not Taken

Policy Status Date

Date associated with the status change.

Policy Type

Market category (e.g., Final Expense – Level).

Policy Length

Term length or product code (e.g., “L-121”).

8.2.3 Payment Information Section

Policy Effective Date

Date the policy goes into force.

Payment Mode

Choose:

- Monthly
- Quarterly
- Semi-Annual
- Annual

Payment Method

Billing method:

- EFT
- Direct Bill
- Debit/Credit (if supported)

Premium Fields

Enter the premium based on the **Payment Mode**:

- Monthly Premium
- QTR Premium
- Annual Premium
- LumpSum or Single Premium

A yellow reminder displays:

Enter the premium that matches the selected Payment Mode above.

Payor Section

- Payor Name
- “Same as Insured” toggle
- Owner Name
- “Same as Insured” toggle

8.2.4 Agent Information Section

Primary Writing Agent

Defaults to the logged-in agent (editable by Admin/Agency roles).

Primary Split %

Typically 100%, but can be adjusted for split cases.

8.2.5 IMPORTANT: Save Policy Before Entering Beneficiaries

Before clicking the **Beneficiaries** tab, you MUST:

✔ Click Save Policy first.

The system cannot attach beneficiaries until a PolicyID exists in the database.
Skipping this step means beneficiary entries will not be saved.

8.2.6 🔹 Pro Tip: Preventing Policies From Linking to the Wrong Client

When entering **multiple policies** or switching between **different clients** during the same session, you may occasionally notice:

The previous policy still appears in the form even though you're on a new client.

This happens because Power Apps sometimes retains the form's last record in memory.

To ensure the new policy attaches to the **correct client**, ALWAYS:

✔ Click Add Another Policy before entering the next policy.

This button fully resets the form and correctly ties the new policy to the client visible in the header:

"You're working on: [Client Name]"

Using **Add Another Policy** keeps your data clean and prevents cross-client policy mix-ups.

8.2.7 Best Practices for Adding Policies

- Verify all fields against the carrier documents
- Double-check the Policy Number
- Ensure the Policy Status and Status Date are correct
- Confirm Payor and Owner relationships
- Match the premium to the Payment Mode
- Always **Save Policy** before moving to Beneficiaries
- Use **Add Another Policy** when entering multiple policies in one session

8.3 BENEFICIARIES

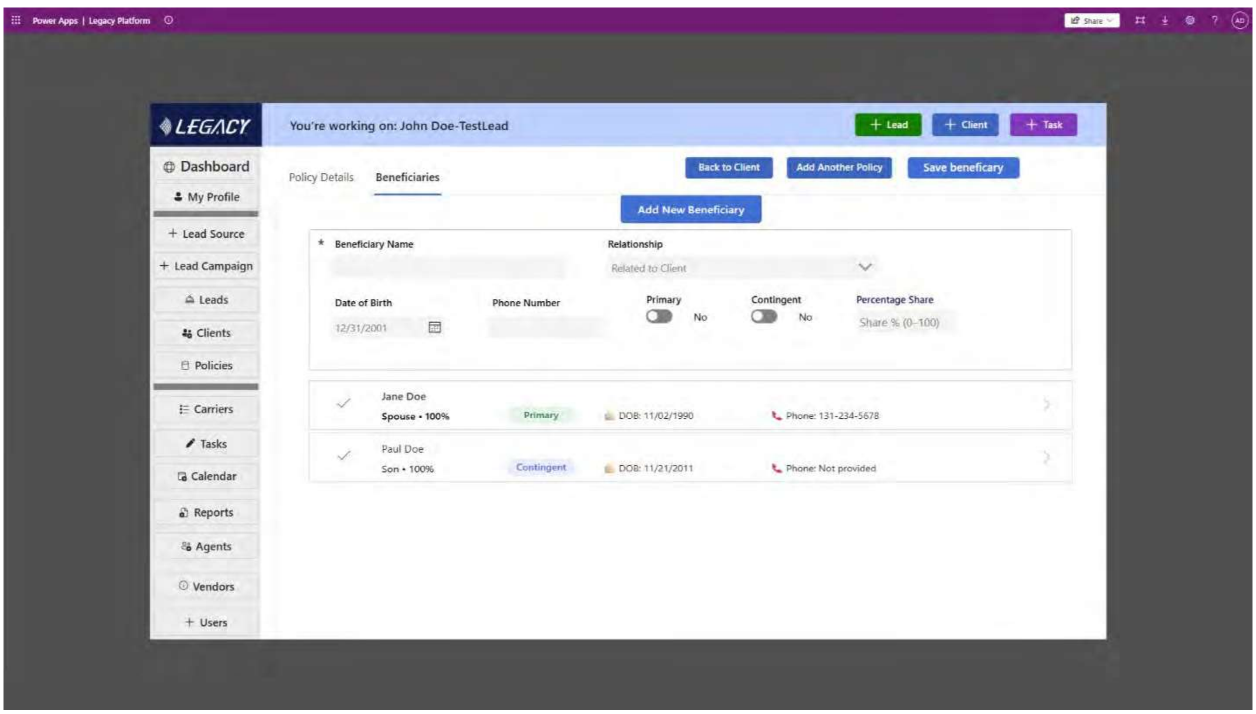
The **Beneficiaries** tab is where you enter all individuals (or entities) who will receive proceeds from the policy. This includes:

- Primary beneficiaries
- Contingent beneficiaries
- Percentage share allocations
- Relationship information
- Contact details

This tab becomes available **only after the policy is saved**, because beneficiary records must be tied to a valid PolicyID.

Below is the Beneficiaries tab:

Policies → Beneficiaries Tab



8.3.1 Showing the Beneficiary Form

When you first navigate to the **Beneficiaries** tab:

⚠️ **The form may not appear immediately.**

This is normal.

If the form is not visible:

✓ Click Add New Beneficiary

The entry panel will slide into view, allowing you to add the first beneficiary.

8.3.2 Add New Beneficiary Form

After clicking **Add New Beneficiary**, the form displays fields for:

Beneficiary Name *(required)*

Full legal name of the beneficiary.

Relationship (to the Client)

Choose the correct relationship from the dropdown, such as:

- Spouse
- Son / Daughter
- Parent
- Business Partner
- Trust / Estate

Date of Birth

Important for verifying identity and reducing carrier delays.

Phone Number

Optional but recommended for future beneficiary contact needs.

8.3.3 Primary vs. Contingent

Two toggles allow you to define the beneficiary's role:

Primary (Yes/No)

Primary beneficiaries receive benefits first.

Contingent (Yes/No)

Contingent beneficiaries receive benefits only if all primary beneficiaries are deceased or disqualified.

Only one of these toggles should be YES for each beneficiary.
The system prevents selecting both.

8.3.4 Percentage Share (0–100%)

Every beneficiary must have a share assigned:

- Primaries must add up to **100%**

- Contingents must add up to **100%**

You may enter:

- 100% to one person
- 50% / 50% split
- 34% / 33% / 33% three-way split
- Any valid combination for contingent beneficiaries

The CRM does not enforce your math, but agents should ensure accuracy.

8.3.5 Saving the Beneficiary

After completing the form:

✓ Click Save Beneficiary

Upon saving:

- The beneficiary appears in the list below
- A role badge displays (Primary or Contingent)
- DOB and phone number are shown
- Relationship description appears under the name
- A chevron icon (right side) allows for future expansion or editing

---

8.3.6 Beneficiary List (Summary Section)

Each saved beneficiary appears in a clean summary card showing:

✓ Name

Example: **Jane Doe**

✓ Relationship

Example: **Spouse • 100%**

✓ Role Tag

Examples:

- **Primary** (green)
- **Contingent** (blue)

✓ DOB

Example: **DOB: 11/02/1990**

✓ Phone

If provided, shows the phone icon and number.
If not: “Phone: Not provided”

✓ Chevron Button

Right-side chevron allows future editing or navigation.

8.3.7 Adding Multiple Beneficiaries

You may repeat the process for:

- Multiple primaries
- Multiple contingents
- Combinations of both

After each entry:

✓ Click Add New Beneficiary again

The form reopens for the next entry.

8.3.8 Best Practices for Beneficiaries

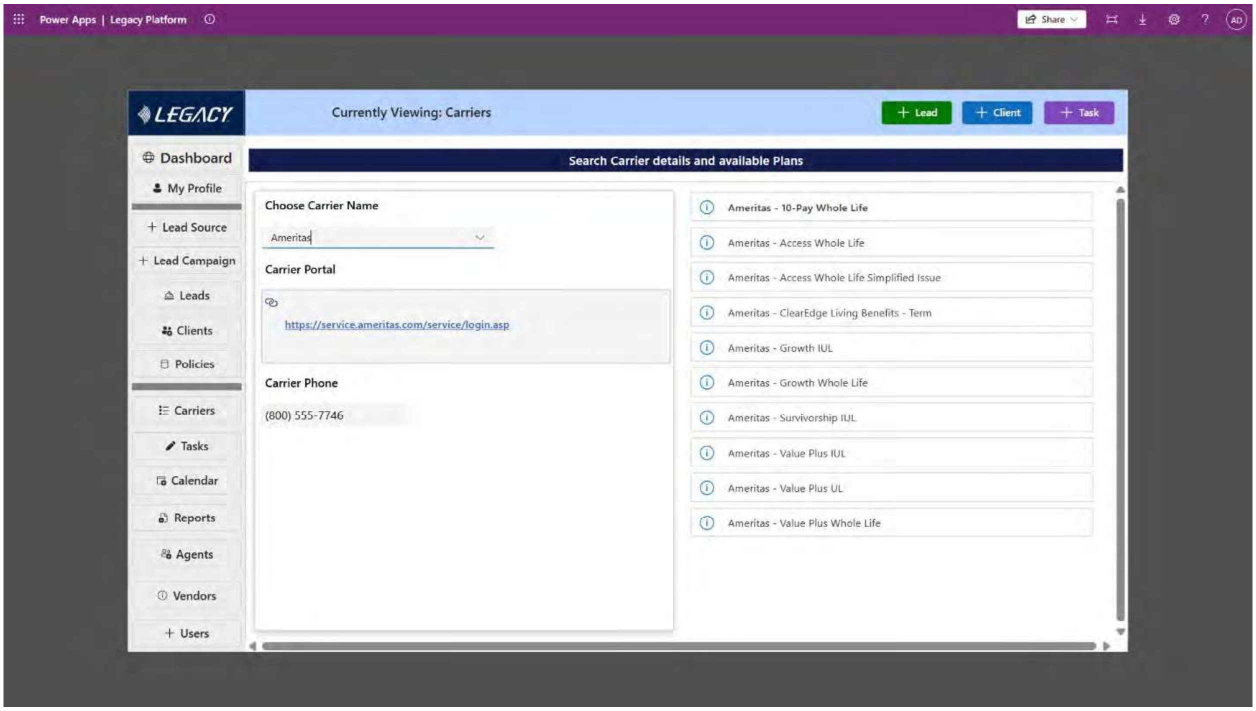
- Always confirm name spelling and DOB with the client
- Ensure percentages for primary beneficiaries total **100%**
- Ensure contingent percentages also total **100%**
- Capture phone numbers whenever possible
- Use the Add New Beneficiary button if the form does not appear immediately
- Double-check relationships to avoid future claims delays
- Review beneficiary list with the client before saving the policy

9. Carriers

The **Carriers** section provides quick access to all insurance carriers available through Legacy. This section is designed to help agents and agencies understand:

- Which carriers Legacy offers
- The carrier's portal link
- The carrier's service phone number
- The specific plans and products each carrier offers

This page is informational for Agents and Agencies. **Carrier assignment to agents is managed ONLY by Admin/Admin Staff**, not from this screen.



9.1 Carrier List

The **Carrier List** screen displays Legacy's approved carriers and all product lines available for each one.

This screen is found by selecting:

Sidebar → Carriers

On this page, you can:

✓ Select a Carrier

Use the **Choose Carrier Name** dropdown to select a carrier, such as:

- Ameritas
- Transamerica

- United Home Life
- Kansas City Life
- Mutual of Omaha
- American Amicable
- And others offered by Legacy

Once selected, the screen displays:

9.1.1 Carrier Portal Link

A direct URL link appears for the selected carrier:

Example:
https://service.ameritas.com/service/login.asp

Agents and agencies can click this link to log in to the carrier portal to:

- View applications
- Download forms
- Review policies
- Check pending cases
- Manage contracting updates

This eliminates the need to store bookmarks or search for portal links online.

9.1.2 Carrier Phone Number

A carrier service phone number is displayed for quick reference.

Example:
(800) 555–7746

Agents can use this when contacting:

- New business departments
- Agent contracting
- Policy services
- Underwriting support

9.1.3 Carrier Product List

On the right side of the screen is a scrollable gallery listing every product the carrier offers through Legacy.

Examples include:

- Ameritas – 10-Pay Whole Life
- Ameritas – Access Whole Life
- Ameritas – Survivorship IUL
- Ameritas – Value Plus Whole Life
- Ameritas – Growth IUL
- Ameritas – Simplified Issue Whole Life

This list provides a fast way to confirm whether Legacy can write a particular product for a client.

9.1.4 Appointment Requests

If an agent or agency **wants to be appointed** with a new carrier:

✓ They *do not* request it through this screen.

✓ They submit contracting requests through SuranceBay / SureLC.

Once an appointment is processed and approved, Admin/Admin Staff can assign that carrier to the agent inside the CRM-AMS.

9.2 Assigned Carriers (Agent View)

Assigned carriers are managed from:

My Profile → My Carriers

This screen shows:

- Carriers assigned to the agent
- Their writing number for each carrier
- Notes field (optional)
- Carrier portal link
- Status settings (Active, Pending, Inactive)

This is where agents maintain their own credentials and carrier access.

Agents cannot assign or remove carriers themselves.
Only Admin/Admin Staff can manage carrier assignment.

9.3 Adding Writing Numbers

On the **My Profile → My Carriers** screen, agents can enter or update:

- Writing Number
- Notes (e.g., portal username reminders)
- Additional context for specific carriers

Agents simply:

1. Type in their writing number
2. Add optional notes (portal info, reminders, etc.)
3. Click **Save**

Writing numbers help:

- Auto-fill policy entries
- Align production tracking
- Provide accuracy for carrier-specific reporting

9.4 Carrier Portals

Whether on:

- **My Profile → My Carriers**, or
- **Sidebar → Carriers**

Agents have access to **Open Carrier Portal** buttons.

These shortcuts take the user directly to the carrier login page.

This provides:

✓ Fast access

No more searching for URLs.

✓ Accuracy

Portal links are managed by Legacy and always kept current.

✓ Convenience

Especially useful when checking case status or pulling forms.

Summary of Section 9

The **Carriers** section helps agents stay organized with:

- Carrier info
- Product availability
- Portal access
- Writing number storage
- Status indicators

All carrier assignment operations, however, remain strictly controlled by Admin/Admin Staff.

10. Tasks

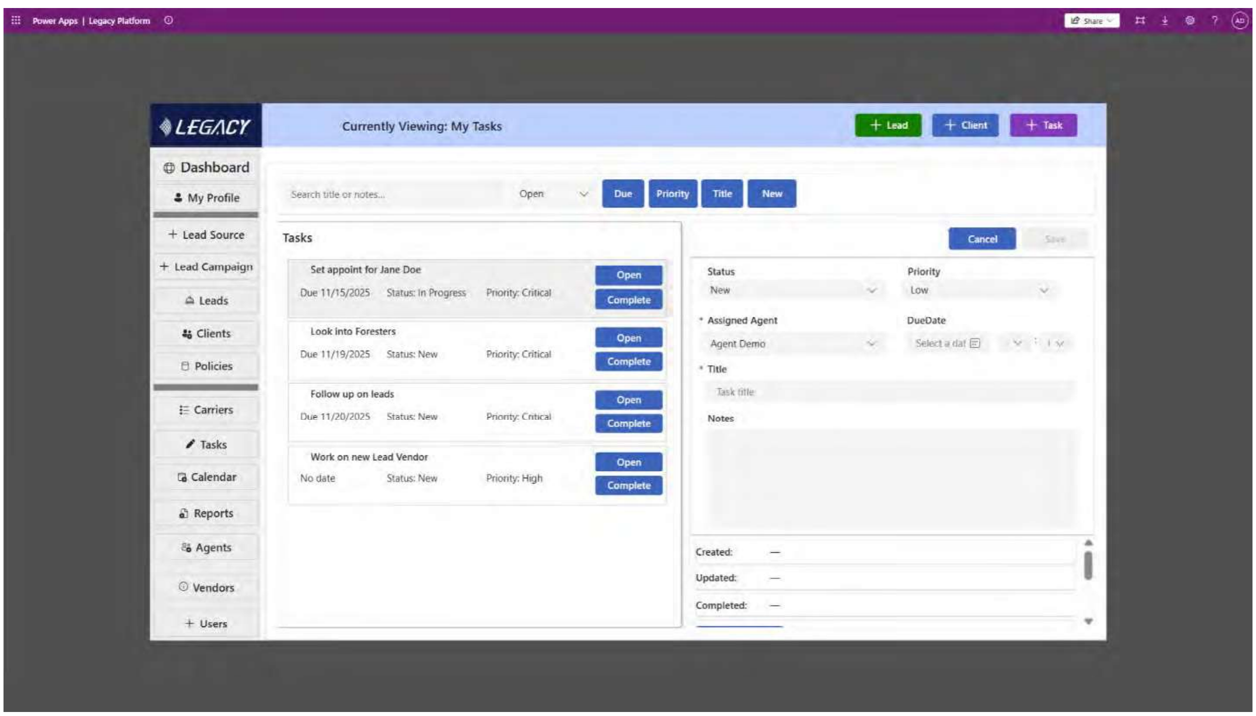
The **Tasks** screen is your personal productivity center inside Legacy CRM-AMS.
Tasks help you:

- Record follow-ups
- Track pipeline activity
- Set reminders
- Stay organized
- Never miss important appointments or client commitments

Each task is tied to **you**, the logged-in agent.
Managers and admin users may see additional views depending on their permissions.

Below is the Tasks screen:

Tasks → My Tasks



10.1 Task List

The left side of the screen displays your complete **Task List**, which includes:

✓ Task Title

A short description of the task, such as:

- *Set appoint for Jane Doe*
- *Look into Foresters*

- *Follow up on leads*
- *Work on new Lead Vendor*

✓ Due Date

Displayed beneath the task title.
If no due date is set, it will show "No date."

✓ Status

Examples:

- New
- In Progress
- Overdue
- Completed

✓ Priority

Displayed in the task row:

- Low
- Medium
- High
- Critical (Red label)

✓ Open / Complete Buttons

- **Open** loads the task in the right-side detail form for editing.
- **Complete** instantly marks the task as completed.

The task list is scrollable (if needed) and automatically reflects your settings from the Task Filters.

10.2 Creating Tasks

To create a new task:

Step 1 — Click New

Located in the row of filter buttons at the top right of the task list.

Step 2 — Fill in the task fields on the right panel:

Status

Defaults to **New**, but may be changed to:

- In Progress

- Completed (rarely used at creation)

Priority

Options include:

- Low
- Medium
- High
- Critical

Assigned Agent

Defaults automatically to the logged-in agent.
(Admin roles may assign tasks to others.)

DueDate

Select a due date from the date picker.
Tasks with no due date will appear without a date in the list.

Title *(required)*

Enter a brief description of the task.

Notes

Optional details for context or follow-up steps.

Step 3 — Click Save

Your new task immediately appears in the Task List.

10.3 Completing Tasks

There are two ways to complete a task:

✓ Option 1: Click the "Complete" button in the task row

This instantly marks the task as completed and updates the Completed timestamp.

✓ Option 2: Open the task and set Status → Completed

Then click **Save**.

Completion Tracking

At the bottom of the right-hand form, the system displays:

- **Created** date/time
- **Updated** date/time
- **Completed** date/time

These timestamps help agents track their productivity.

10.4 Quick Filters & Search

Across the top of the Task List are several powerful filtering tools.

Search Box

Search by title or notes text.

Status Dropdown

Filter tasks by:

- Open (default)
- New
- In Progress
- Completed
- All

Quick Filter Buttons

- **Due** → Sorts by due date
- **Priority** → Shows highest priority tasks first
- **Title** → Sorts alphabetically
- **New** → Creates a new task immediately

These filters make it easy to find tasks quickly and stay organized.

10.5 Task Alert Bubble

At the top of the CRM-AMS dashboard (not shown in this screen), you'll see a **small bell icon** with a **red number bubble**.
This number represents:

✓ Total open tasks

that meet one or more of these conditions:

- Due today
- Upcoming soon
- Overdue

This alert system helps ensure agents stay on top of critical follow-ups and deadlines.

The alert count updates automatically when:

- Tasks are created
- Tasks are completed
- Filters change
- A new day begins

---

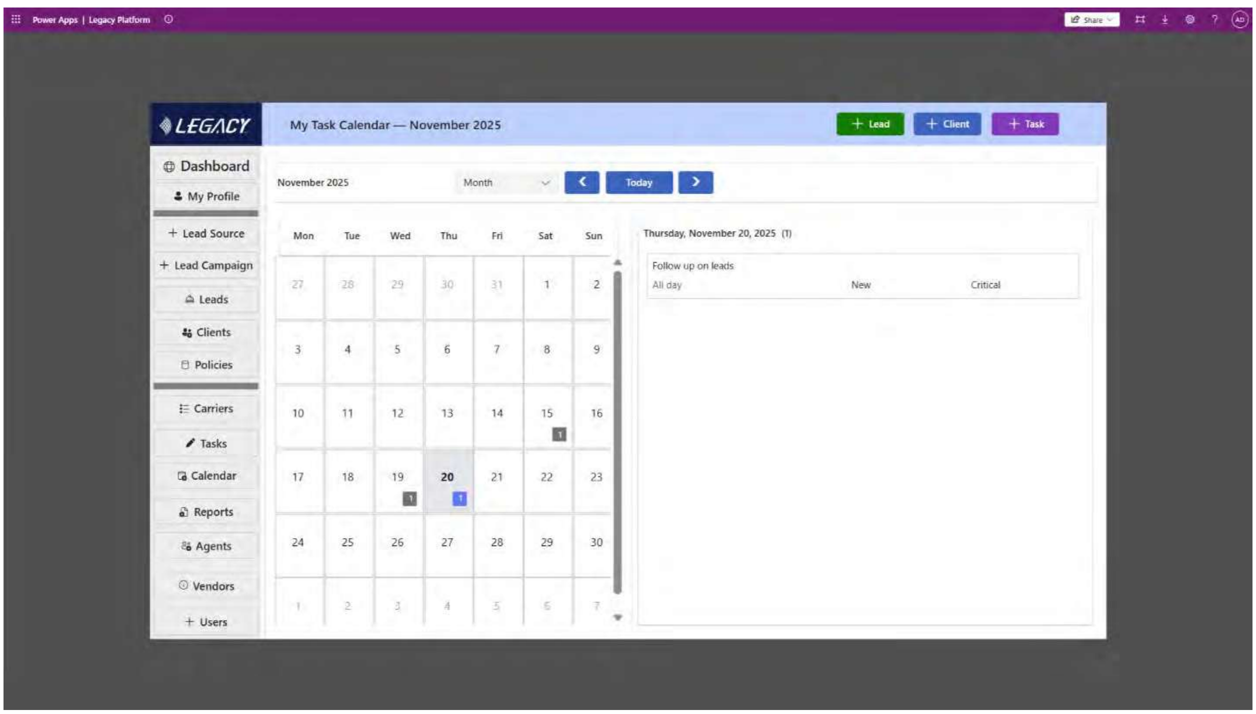
11. Calendar

The **Calendar** screen displays all tasks assigned to the agent in a clean, month-view layout. This view helps agents visually track upcoming due dates, workload distribution, and daily task details without needing to look at the full task list.

The Calendar does **not** show birthdays or policy review dates.
Those important items appear only on the **Dashboard → Important Dates** tab.

Below is the Calendar screen:

Calendar → My Task Calendar



11.1 Task Calendar Overview

The Task Calendar provides a month-at-a-glance view of all current and upcoming tasks.

What the calendar shows:

- All tasks assigned to the logged-in agent
- Tasks displayed on the corresponding day
- Small badges showing the number of tasks due each day

- A highlighted box around the selected date
- A right-side panel displaying full details for that day's tasks

Each date can contain:

- **0, 1, or multiple tasks**
- **Task count badges** such as "1" (blue box in the screenshot)
- **Shaded highlight for the selected day**

This layout gives agents a fast, visual overview of their obligations throughout the month.

11.2 Navigating the Calendar

At the top of the calendar, agents can adjust the view using simple navigation controls:

Month Selector

A dropdown that lets the user choose a different month instantly:

- November 2025
- December 2025
- Any upcoming or past month

Left/Right Arrows

Move the view backward or forward by one month at a time.

Today Button

Jump instantly back to the current day, regardless of which month the user is viewing.

These controls help agents stay oriented and quickly jump between months for planning and review.

11.3 Viewing Tasks by Date

Each day on the calendar works as a clickable date selector.

When a user clicks a day:

- The date becomes highlighted
- The right-side panel refreshes
- Tasks scheduled for that day appear in a list

If that day has no tasks, the panel will be empty.

Task count badges appear directly on the calendar days to show:

- **1** = one task due

- **2+** = multiple tasks due
- Gray badge vs. blue badge indicates user-selected vs. non-selected dates

Example from screenshot:

- **November 19 & 20** show tasks (indicated by small "1" badges)
- Clicking **20** displays the "Follow up on leads" task in the right panel

This allows agents to easily focus on one day at a time.

11.4 Task Details Panel

The right-side panel shows the **full details** for tasks due on the selected day.

Each task row displays:

✓ Task Title

Example: *Follow up on leads*

✓ Time Indicator

Tasks appear as **All day** for now.

✓ Status

Example: *New*, *In Progress*, etc.

✓ Priority

Example: *Critical*, *High*, *Medium*, *Low*

The task detail view allows agents to understand their workload for that day without opening each task individually.

Editing tasks still takes place from the main Tasks screen, not in the calendar view.

This ensures the calendar stays clean and focused.

11.5 Today Button & Month Navigation

The **Today** button centers the view back to the current date with a single click.
This is helpful when navigating several months away and quickly needing to return to today's task list.

Month Navigation Tools Recap:

- **Left Arrow** → Previous month
- **Right Arrow** → Next month
- **Month Dropdown** → Jump directly to a specific month

- **Today Button** → Instantly return to the current date and month

These tools provide intuitive, fast movement through time for planning, reviewing, and managing workloads.

---

12. Reports

The Reports screen provides agents with clear, easy-to-read insights into their clients, leads, and production activity.

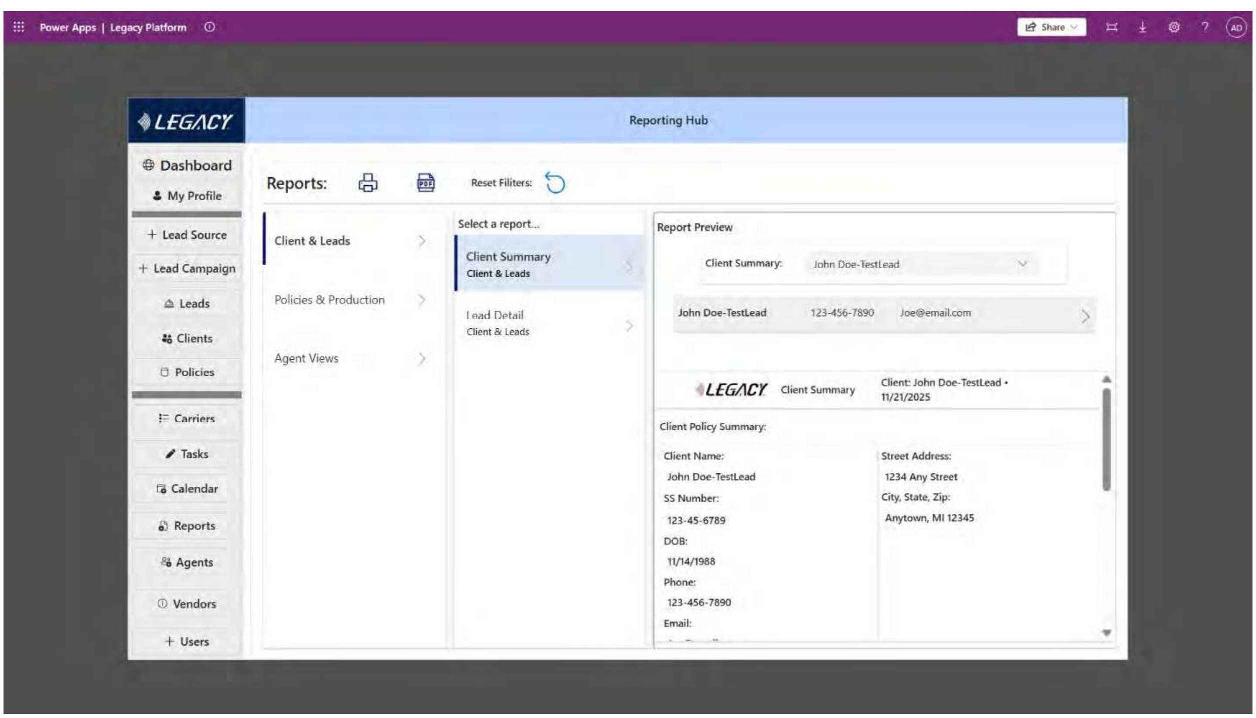
It is designed to help agents quickly understand their business performance without needing spreadsheets or manual tracking.

Agents can print or save any report as a PDF using the Print/PDF buttons at the top of the screen. All reports update automatically based on the filters selected (date ranges, search type, or report category).

The Reports screen is divided into three categories:

- **Client & Leads** – summary reports used for client reviews and working leads.
- **Policies & Production** – monthly production totals, carrier breakdowns, and market-type performance.
- **Agent Views** – agent-level ROI insights tied to Lead Campaigns.

Below is the main Reports screen:
Reports → Reporting Hub



12.1 Client Summary & Lead Detail Reports

The first section of the Reporting Hub—**Client & Leads**—contains two agent-friendly reports:

- **Client Summary**
- **Lead Detail**

Both reports work nearly identically. Their purpose is to give agents a clean, printable snapshot of either a client or a lead.

12.1.1 Client Summary Report

Purpose:
The Client Summary provides a complete overview of a client's core information, policy details, and contact information. This is commonly used during **annual reviews**, **policy check-ins**, or **in-home appointments**.

How it Works:

1. **Choose a Client**
   Use the dropdown labeled *Client Summary* to select the client you want to review.
2. **Instant Preview**
   Once selected, the right-hand panel displays a formatted summary including:
   - Client Name
   - SSN (masked or truncated in future release)
   - DOB & Age
   - Phone & Email
   - Street Address
   - Policy Information:
     - Policy Number
     - Effective Date
     - Face Amount
     - Monthly Premium
     - Carrier
     - Plan Name
3. **Print or Save as PDF**
   The icons at the top (Print / PDF) both open your computer's print dialog.
   - Select your physical printer **or**
   - Choose **"Print to PDF"** (Adobe PDF, Microsoft PDF, etc.)

Use Case Example:
Agents often print a Client Summary before a scheduled review to refresh themselves on the client's current coverage and verify all information is up-to-date.

12.1.2 Lead Detail Report

Purpose:
The Lead Detail report creates a printable snapshot of a lead. This can be extremely useful when:

- Door knocking
- Running inbound/outbound appointments
- Following up with older or recycled leads
- Preparing for in-person events

How it Works:
The workflow is nearly identical to the Client Summary:

1. Select **Lead Detail** from the *Client & Leads* category.
2. Pick the lead you want from the dropdown.
3. Review the formatted summary on the right-hand side.
4. Print or save to PDF.

What's Included in the Lead Summary:

- Lead Name
- Address (if provided)
- Phone & Email (if provided)
- Market Type
- Lead Source
- Created/First Contact Dates
- Notes (if added by the agent)

Use Case Example:
Agents can print several Lead Detail sheets before a dialing or door-knocking session. Each sheet provides enough information to make confident, informed first contact.

Pro Tip:

Because the Client Summary and Lead Detail share the same formatting and print workflow, agents can switch between them easily depending on whether they are working warm clients or cold leads. Both formats give you a clean, professional hard copy without exposing unnecessary system data.

12.2 Policies & Production Reports

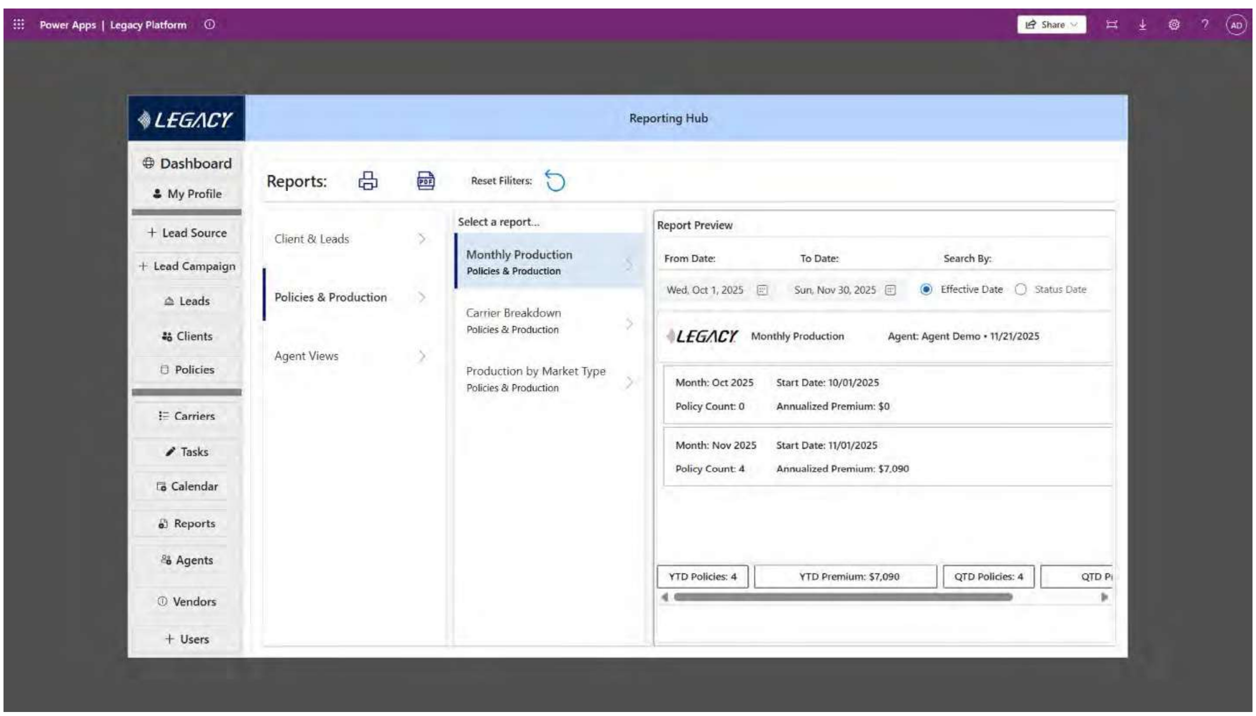
12.1 Monthly Production Report

The **Monthly Production** report provides agents with a clear view of their submitted business within a selected date range.
It summarizes:

- Total policies written by month
- Annualized premium totals
- Start dates for each month of production
- YTD (Year-to-Date) and QTD (Quarter-to-Date) production metrics
- Ability to search by **Effective Date** or **Status Date**
- A print-friendly layout for exporting or printing

This report is especially useful for tracking performance trends, planning activity goals, and verifying month-end production numbers.

Report Screen: Monthly Production



12.1.1 Using the Monthly Production Report

Select a Date Range

You can choose any From/To date range.

- Use the calendar pickers for fast date selection.
- The **Search By** toggle lets you switch between:

    - **Effective Date** → when a policy goes in force
    - **Status Date** → when a status (e.g., Paid, Active) was updated

Monthly Breakdown

Each month displays:

- **Policy Count –** number of written policies
- **Annualized Premium –** useful for tracking goals
- **Start Date –** automatically displays the first day of the month being summarized

Production Totals

At the bottom of the report, the system provides:

- **YTD Policies**
- **YTD Premium**
- **QTD Policies & Premium**

These totals update automatically based on your selected dates.

Print or Export

Use either of the top icons:

- **Print icon** → opens print dialog (choose printer or Save as PDF)
- **PDF icon** → same result as Print; exports the formatted report

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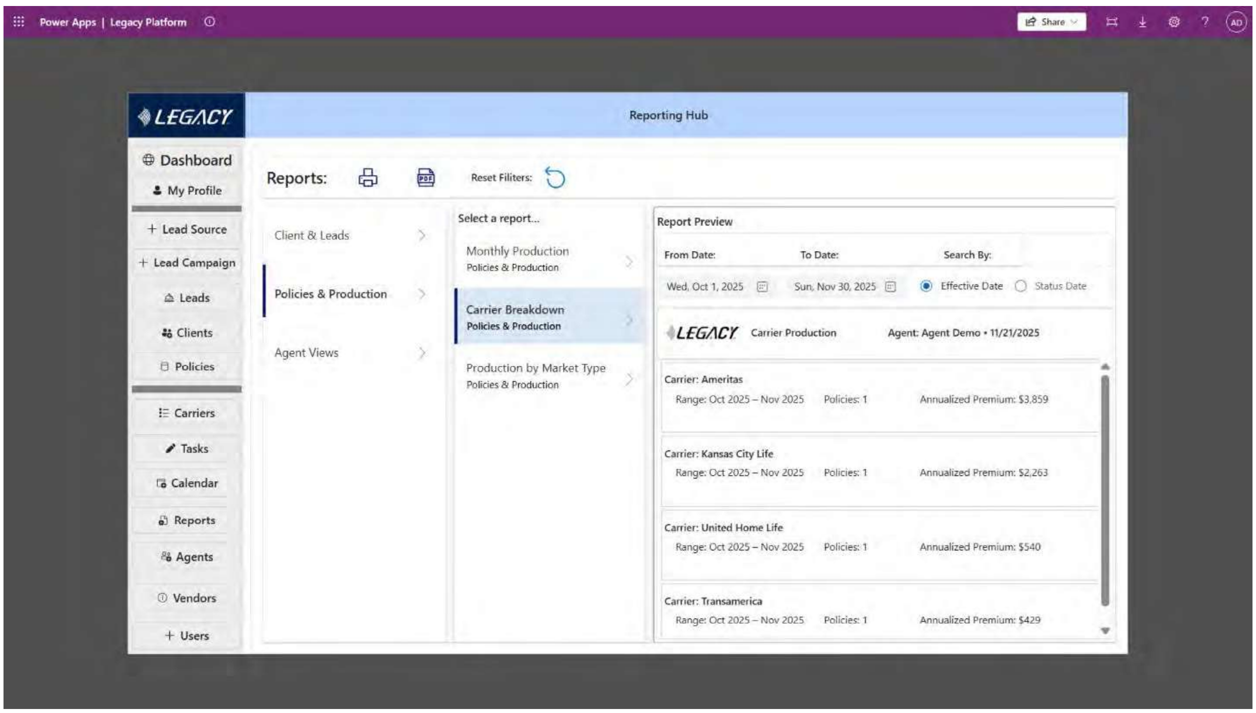
12.3 Carrier Breakdown

The **Carrier Breakdown** report shows how your production is distributed across each insurance carrier.
This report is especially helpful for identifying which carriers you write the most business with and how your premium volume trends across different companies.

You can filter the date range at the top of the screen and choose whether to calculate production using **Effective Date** or **Status Date**.
The report automatically updates to display policies written with each carrier, total annualized premium, and policy counts.

Below is the Carrier Breakdown screen:
Reports → Carrier Breakdown



2.3.1 What This Report Shows

- All carriers with at least one policy written in the selected date range
- Policy count per carrier
- Annualized premium totals
- A clean side-by-side layout that makes it easy to compare carrier performance

---

12.3.2 How Agents Use This

Agents typically use this report to:

- Identify which carriers are generating most of their premium

- Track diversification of business
- Prepare for coaching or performance meetings
- Verify which carriers may need more focus or balance

This is also a great tool for Annual Business Reviews with uplines or agency owners.

12.3.3 Filtering & Resetting

You can adjust:

- **From Date**
- **To Date**
- **Search By:** Effective Date or Status Date
- **Reset Filters** instantly brings the report back to default settings

---

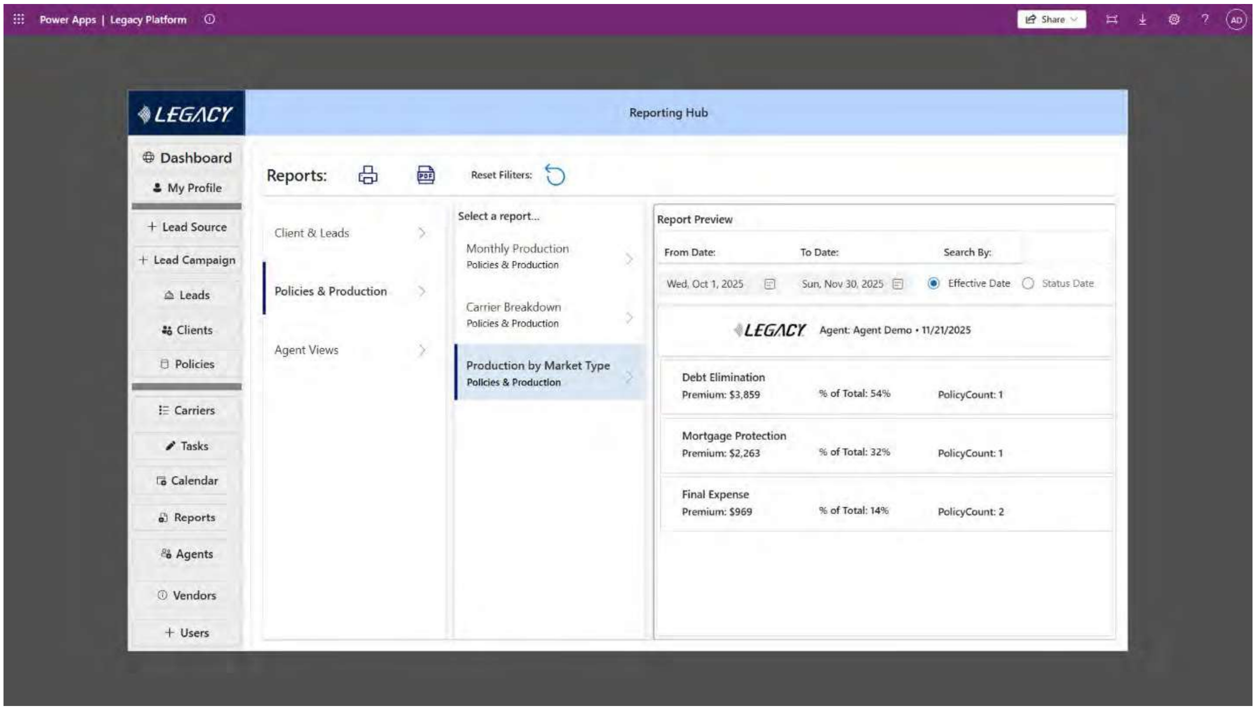
12.4 Production by Market Type

The **Production by Market Type** report shows how your issued business is distributed across different product categories such as **Mortgage Protection**, **Final Expense**, **Debt Elimination**, or any other market types added by Legacy.

This report helps agents understand:

- Which types of policies they write most often
- How their mix of business affects revenue
- How much premium each market type contributes
- Where they may want to focus future marketing efforts

Below is the **Production by Market Type** report screen:
Production by Market Type → Policies & Production



How to Use This Report

Select a Date Range

Choose:

- **From Date**
- **To Date**

The report will automatically refresh.

You can also choose whether you want to filter by:

- **Effective Date** (default)
- **Status Date**

What You Will See

For each market category, the report displays:

- **Premium amount**
- **Percentage of your total business**
- **Policy count**

This helps quickly identify:

- Your strongest market
- Under-developed opportunities
- Production patterns over time

Example Insights You Might Use

- "54% of my business this month came from Debt Elimination—maybe I should continue promoting that funnel."
- "I issued 2 Final Expense policies—good reminder to run more FE leads next week."

12.5 Lead Campaign ROI

The **Lead Campaign ROI** report helps agents quickly evaluate how well a specific lead campaign is performing.
This report is part of the *Agent Views* category and is designed to answer a simple but critical business question:

"Is the money I'm spending on leads producing profitable results?"

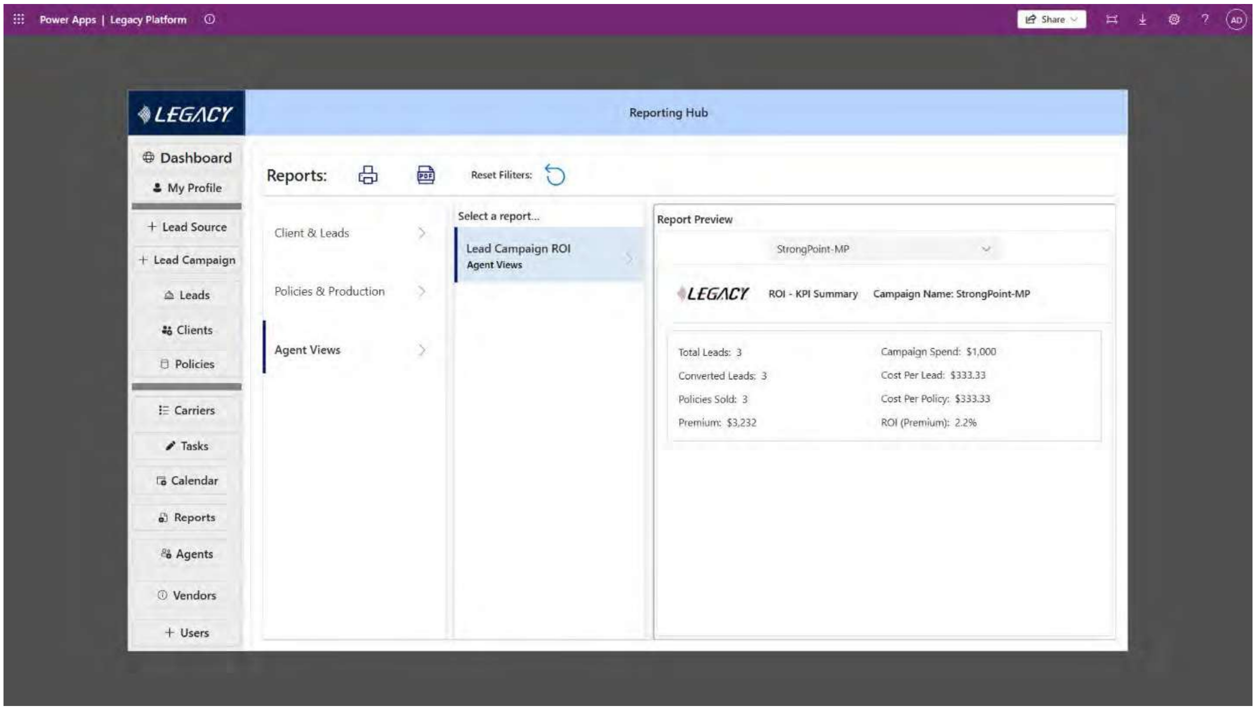
Agents can select any campaign from the dropdown list (for example, *StrongPoint-MP*), and the report immediately displays key performance metrics, including:

- **Total leads purchased**
- **Number of leads converted**
- **Policies sold from this campaign**
- **Total premium generated**
- **Campaign cost**
- **Cost per lead**
- **Cost per policy sold**
- **Overall ROI (Return on Investment)**

This report is especially helpful for deciding:

- Which campaigns should be scaled up
- Which campaigns are underperforming
- Where to allocate next month's budget
- How effectively an agent converts leads from each source

Below is the Lead Campaign ROI screen:
Reports → Lead Campaign ROI



How to Read This Report (Simple Breakdown)

1. Total Leads

The total number of leads purchased in this campaign.

2. Converted Leads

How many of those leads became actual clients.

3. Policies Sold

Total number of policies written from this campaign (sometimes higher than the number of converted leads if a client buys multiple policies).

4. Premium

Total *annualized premium* produced by those policies.

5. Campaign Spend

The total amount spent purchasing those leads.

6. Cost Per Lead

A straight calculation:
Campaign Spend ÷ Total Leads

7. Cost Per Policy

Campaign Spend ÷ Policies Sold
This helps agents see how much it "costs" to secure each written policy.

8. ROI (Premium %)

This shows the ratio between revenue (premium) and cost (campaign spend).
A positive ROI means the campaign is producing more premium than cost.

Why This Matters

This is one of the most valuable reports for agents because it helps them run their business like a business.
It gives true clarity into:

✓ Which campaigns generate the strongest returns
✓ Whether buying more leads makes financial sense
✓ How effectively an agent is converting each type of lead
✓ Whether to increase, maintain, or pause specific campaigns

This is the report most agents use when reviewing their monthly marketing strategy or planning their next lead purchase.

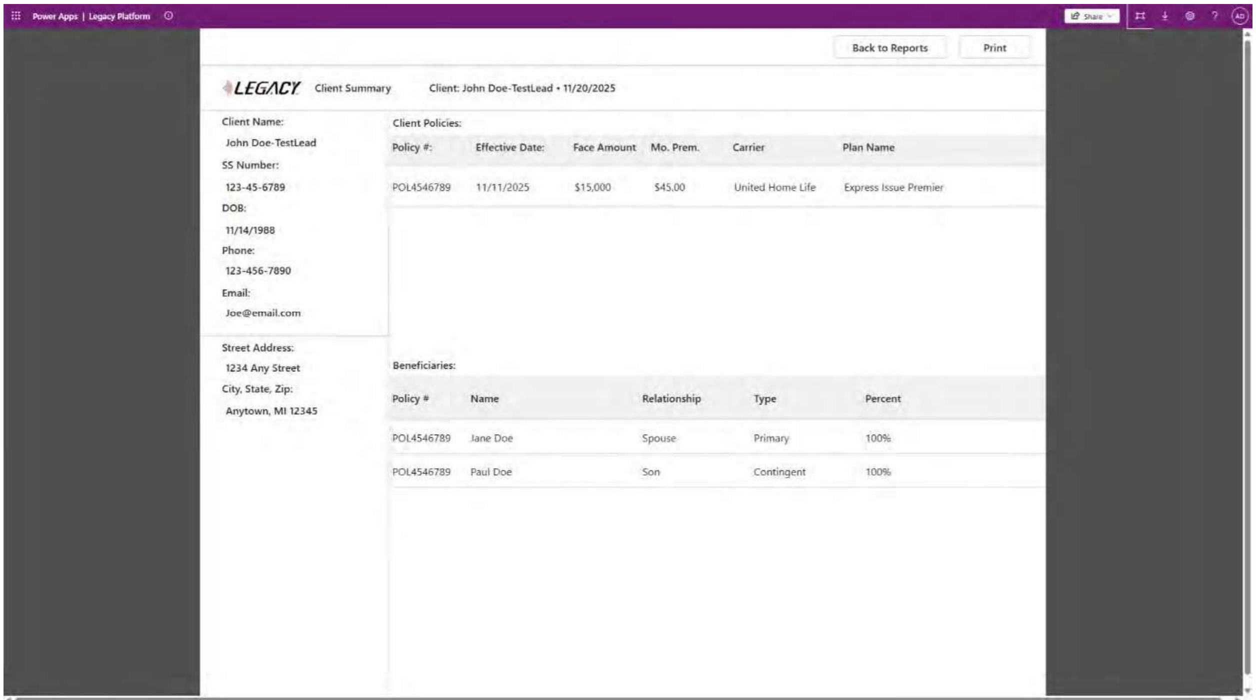
12.6 Client Review (Printable Report)

The **Client Review** page is a print-ready version of the Client Summary.
Instead of displaying inside the Reporting Hub, this view opens in a dedicated full-page layout so agents can easily print or save the information as a PDF.

This report is primarily used during **annual reviews**, **in-home appointments**, or anytime an agent needs a professional, organized summary of a client's policies and beneficiaries.

Below is the Client Review screen:

Client Review → Printable Report



What the Client Review Report Includes

The printable report contains the full set of client details in a clean two-column format, including:

Client Details

- Client Name
- SS Number
- Date of Birth
- Phone Number
- Email
- Street Address
- City, State, ZIP

Client Policies

For each policy, the report shows:

- Policy Number
- Effective Date
- Face Amount
- Monthly Premium
- Carrier
- Plan Name

Beneficiaries

Each beneficiary row includes:

- Policy #
- Name
- Relationship
- Type (Primary / Contingent)
- Percentage Share (0–100%)

The report automatically formats spacing, columns, and headers for optimal printing.

Top-Right Action Buttons

At the top of the page, agents will see two buttons:

🔙 **Back to Reports**

Returns the user to the main Reporting Hub without printing.
Use this when you simply want to preview the report but do not need to export it.

🖨 **Print**

Opens the computer's print dialog.
From here the agent can:

- Print a hard copy
- **Or choose "Save as PDF"** (Adobe PDF, Microsoft Print to PDF, etc.)

Both printing and PDF saving are handled through the user's native system dialog.

When to Use This Report

Agents commonly use the Client Review printout for:

- Annual coverage reviews
- In-home meetings
- Quick policy verification
- Sharing a summary with the client
- Files and documentation inside the client folder

It provides a polished, professional summary that is much cleaner than printing a Power Apps screen.

13. Troubleshooting & Tips

This section provides quick solutions to common issues agents may experience while using the Legacy CRM-AMS. Most problems can be resolved with simple steps such as refreshing data, reloading the app, or verifying internet connectivity. Use this guide whenever something feels off or isn't behaving as expected.

13.1 Common Errors

Form Not Submitting

If the Save button doesn't respond or fields remain highlighted:

- Required fields may be empty
- A dropdown selection hasn't been made
- A date field has an invalid or blank value
- The record still shows errors from a prior submission

Fix:
Complete all required fields → click **Save** again.
If still stuck, return to the list screen → reopen the record → re-enter missing fields.

Gallery or List Shows No Data

If Leads, Clients, Policies, or Tasks appear empty:

- Filters may still be applied
- You may be viewing another agent's data (Admin view)
- The underlying table hasn't refreshed after a recent save

Fix:
Tap **Reset Filters** or navigate away and back to the screen.
Admins should verify the correct **role-based filter** is active.

Record Still Shows Old Values

If you save a change but the old value remains visible:

- The form may be in **View mode**, not Edit mode
- You may be looking at a cached copy
- The app may not have refreshed your latest entry

Fix:
Leave the screen → return → tap the record again.
If it persists, manually refresh the table using the **Refresh** icon (if available on that screen).

Policy/Lead/Client Shows Wrong Agent

This occurs when:

- The logged-in account and selected record don't match
- The form wasn't properly initialized before creating a new item
- Previous data remained loaded in memory

Fix:
Return to the list → tap **New** instead of editing an existing item.
Agents should verify their AgentID auto-fills correctly.

13.2 Saving & Refreshing

When to Save

Always tap **Save**:

- After entering a lead
- After editing a client or policy
- After adding notes or tasks
- Before switching tabs inside a detail screen

Most screens do **not** auto-save.

When to Refresh

Refreshing is helpful when:

- A gallery doesn't update
- Newly added items don't appear
- Another user has made recent changes
- Dropdown lists are out of date (carriers, lead sources, etc.)

Use the **Refresh** icon on the screen or fully close/reopen the app.

13.3 Sync Issues

Offline Mode / Weak Signal

If the app behaves unpredictably:

- Data may not sync
- Save buttons may not work
- Dropdowns may appear empty

Fix:
Move to an area with stronger signal → refresh the screen.

Rows Not Appearing After Import

For Lead Uploads or bulk additions:

- Allow 10–20 seconds for SQL tables to sync
- Navigate away and back to the gallery

If errors appear in the import summary, fix those rows and re-upload if needed.

Permissions Don't Match What You Expect

If you suddenly lose access to a screen or function:

- Your role or permissions may have been updated
- You logged in with the wrong Microsoft account
- Cached session data may be outdated

Fix:
Log out completely → sign back in with the correct email → reopen app.

13.4 Support & Contact

If you encounter an issue that isn't covered here, or something appears truly broken, you can reach out for help.

Who to Contact

- **Admin / Legacy Support** – For user access, roles, system issues, or data problems
- **Agency Manager** – Questions about leads, assignments, or carrier statuses
- **Technical Support (Internal)** – App errors, sync problems, or bugs

Include This Information When Requesting Help

It speeds up troubleshooting:

- Your name and email
- Screen where the issue occurred
- What you were trying to do
- Any error messages
- Whether you tried refreshing or restarting the app

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14. Glossary

The Glossary provides clear explanations of common terms used throughout the Legacy CRM-AMS, the life insurance industry, and the platform itself.
Agents can refer to this section whenever they encounter unfamiliar terminology in the app, training, or reporting tools.

14.1 CRM Terms

Lead

A prospective client who has expressed interest or whose information has been added manually or via upload.

Client

An individual who has been converted from a lead or added directly and is actively working with an agent.

Conversion / Convert Lead

The process of turning a lead into a client record. This preserves history and allows policies to be written.

Lead Source

Identifies where the lead originated (e.g., Facebook Ads, Direct Mail, Vendor, Referral).

Lead Campaign

A marketing or advertising campaign designed to generate leads. Used for ROI reporting.

Tasks

Reminders or action items that agents create to stay organized, such as follow-ups or appointment confirmations.

Notes

Chronological history entries added to leads or clients to track interactions, conversations, and updates.

Household

A group of clients connected by relationship, often used for family coverage or shared policies.

Assigned Agent

The agent responsible for managing a specific lead, client, or policy.

Primary Writing Agent

The agent who writes the policy and receives credit for production.

Important Dates

A dashboard section listing birthdays and policy review dates.

Dashboard Tiles

Quick-view summary boxes displaying production, leads, clients, reviews, and monthly activity.

Policy Review Date

Date an agent should re-evaluate a client's coverage, typically 12 months after issue.

14.2 Insurance Terms

Policy

A life insurance contract issued to a client, containing coverage details and premium requirements.

Face Amount

The death benefit amount the policy pays out upon the insured's death.

Premium (Mo. Prem.)

The cost the client pays for their insurance — monthly, annual, quarterly, or semi-annual.

Effective Date

The date the policy becomes active and coverage begins.

Status Date

The date a policy's status changed (e.g., Inforce, Lapsed, Pending).

Inforce

A policy that is active and premium-paying.

Carrier

The life insurance company issuing the policy (e.g., Ameritas, Transamerica, UHL).

Plan / Product

The specific insurance plan within a carrier's lineup (e.g., Term, Final Expense, IUL).

Market Type

Identifies the coverage purpose:

- Mortgage Protection
- Final Expense
- Debt Elimination
- Income Protection
- Legacy Planning

Beneficiary

Person(s) designated to receive the policy benefit.

Primary Beneficiary

First in line to receive death benefit funds.

Contingent Beneficiary

Receives the benefit if the primary beneficiary is unavailable.

Annualized Premium

Premium multiplied by 12 — used to measure production.

Paid (Net of Chargebacks)

Production that has cleared all chargebacks and reflects actual earned compensation.

14.3 Platform Terms

Legacy CRM

The single-user version of the app for agents.

Legacy CRM-AMS

The expanded agency management system with reporting, dashboards, billing, and multi-user support.

Power Apps

The Microsoft platform used to build the Legacy CRM-AMS.

Tables (SQL)

The database structure storing all app data — leads, clients, policies, tasks, users, etc.

Refresh

Reloads data in the app to display the latest records.

Filter

Limits the data shown based on selected criteria (date, status, agent, source, etc.).

Role-Based Security

Controls which screens an agent, agency, or admin can access.

Permissions

Fine-grain access rules controlling which actions a user can perform (edit, view, manage leads, etc.).

Print / PDF Buttons

Opens the computer's print dialog to create a physical copy or generate a PDF.

Dropdown / Combo Box

A selectable list inside a form, commonly used for choosing carriers, plans, agents, market type, etc.

Vertical Container / Scroll Container

Form layout elements inside screens that allow long data-entry forms to scroll cleanly.

Tabs (Details, Policies, Notes, Documents)

Used to organize client or policy information without cluttering the screen.

Import Summary Tiles

Boxes showing total rows, valid rows, and errors for lead uploads.

Magnifying Glass Icon

Used throughout the app to open the full detail view of a record (client or lead).