

Brokerage Module — Overview

Overview

The **Brokerage Module** manages broker companies and their agents, tracks broker-submitted leads and CILs, and handles broker contracts and activities.

Module Sections

Section	Description
Add Broker Request / Lead	Add a new broker request or broker lead into the system.
Broker CILs	View and manage CILs (Client Information Letters) submitted by broker companies.
Active Brokers	List of all active broker companies.
Pending / Blocked Brokers	Broker companies pending approval or blocked from the system.
Send Mail	Send bulk emails to broker companies.
Activities Management	Track and manage activities with broker companies.
Upload Brokers	Bulk import broker companies via Excel.
Broker Contract	Manage and download broker contracts.

Created 2026-06-28 08:57:31 UTC by Admin
Updated 2026-06-28 08:59:48 UTC by Admin