

Organizational Standard

In the Power Portal, there is a specific structure used to organize the workflow. Each subcategory of the organization is an office. The main office is the Power Portal. Below the Power Portal are the four regional offices. Below those regional offices are several states that are in the region. There is yet another level of office for each Leader, and the agent contacts are found within that office, assigned to the appropriate leader team (Area/Team Leader, Broker, etc). In the US platform, it's organized by states. In the Canada platform, it's organized by provinces and territories. For purposes of this document, the term state(s) used also applies to a province or territory.

Name	Size	Owner	Action
Power Portal Company Office	363	 Epique Realty	 
▼ East - LaShon Spicer Regional Office	72	 --	  
▼ Alabama - Lorenzo Randall State Office	8	 --	  
Jacksonville/Anniston - Alyse Savage Area Leader Office	1	 --	  
Tuscaloosa - Anna Calhoun Area Leader Office	1	 --	  

States are named for state but the Area Leader office is named for the area if known and the Leader name. This makes it easy to find the Leader or Area needed to assign leads. The ownership of the lead is with the Office to prevent mistakes in visibility. Visibility works downward, not upward. Regionals can see all the states in their region and all the Area Offices in their region, but cannot see anything outside their region. Brokers can see all Area Offices in their state, but nothing outside of their state. Area Leaders can only see inside their Area Office. Team Leaders are not given an Office, but are assigned to the state office they are licensed in, and the broker has visibility over them, and both the team leader and broker have visibility of the leads/agents on the team.

Terminology for the different roles in the Power Portal is to include several leadership roles.

Role Name	Definition	Permission Profile	Visibility
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Lead	Agent mentee, an Epique Agent	N/A	N/A
Agent	Area Leader or Team Leader	Standard User	Area Office Only
Managing Broker	Official broker of the state	Standard User	State Office Only
State Broker	The "assistant" broker of the state	Standard User	State Office Only
Second Area Leader	For additional licensed state	Standard User	Area Office Only
Second Broker	For additional licensed state	Standard User	State Office Only
Third Area Leader	For additional licensed state	Standard User	Area Office Only
Third Broker	For additional licensed state	Standard User	State Office Only
Regional Director	Leader Director of a Region	Company Admin	Entire Region Office
National Director	Leader Director of all Regions	Company Admin	Entire Power Portal
State Leader	Assists the State Broker	Standard User	State Office Only
Wildcard for future expansion	N/A	N/A	N/A
Wildcard for future expansion	N/A	N/A	N/A

Permission Profiles

Standard Users include Area Leaders, Team Leaders, Brokers, and State Leaders. These roles cannot manage or make changes to user assignments, cannot create or modify the organizational hierarchy, or make major changes to the leads.

Company Admin includes Regional Directors, National Director, and Epique Staff/Support. These roles can perform all the things that Standard Users cannot. Leads that need to be reassigned to a leader or broker will be managed by the Regional or National Director, not the Broker or Area/Team Leader.

Lead Types

There are two lead types for agent leads: Agent and Other. All other lead types are disabled (buyer, seller, etc).

Agent: Active Epique agents

Other: Non-active agent who has left Epique

Former Epique agents will be archived in the Power Portal, utilizing a placeholder agent user seat (dummy seat). The Admin team will be responsible for moving the former agent from the current leadership assignment to the archived seat. Once an agent is offboarded from Epique, leaders and brokers will no longer see the agent in the Power Portal. Only the Admin team will have access to that.

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