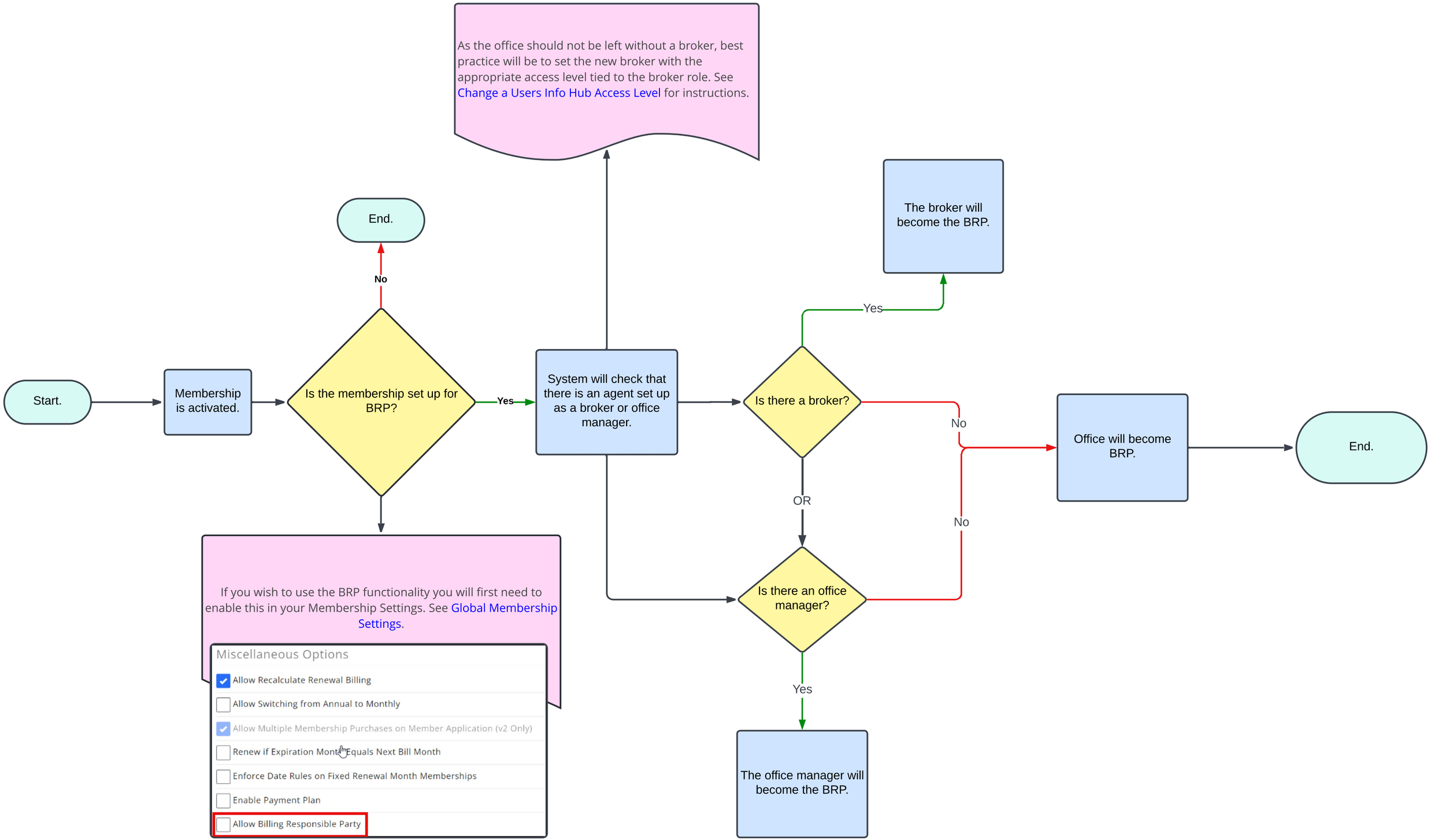
As the office should not be left without a broker, best practice will be to set the new broker with the appropriate access level tied to the broker role. See Change a Users Info Hub Access Level for instructions.
End.
No
The broker will become the BRP.
Yes
Start.
Membership is activated.
Is the membership set up for BRP?
Yes
System will check that there is an agent set up as a broker or office manager.
Is there a broker?
No
Office will become BRP.
End.
OR
No
Is there an office manager?
Yes
The office manager will become the BRP.
If you wish to use the BRP functionality you will first need to enable this in your Membership Settings. See Global Membership Settings.
Miscellaneous Options
Allow Recalculate Renewal Billing
Allow Switching from Annual to Monthly
Allow Multiple Membership Purchases on Member Application (v2 Only)
Renew if Expiration Month Equals Next Bill Month
Enforce Date Rules on Fixed Renewal Month Memberships
Enable Payment Plan
Allow Billing Responsible Party