

AccuprimeFlow for admins

Verifying discovery calls, paying commissions and running the team.

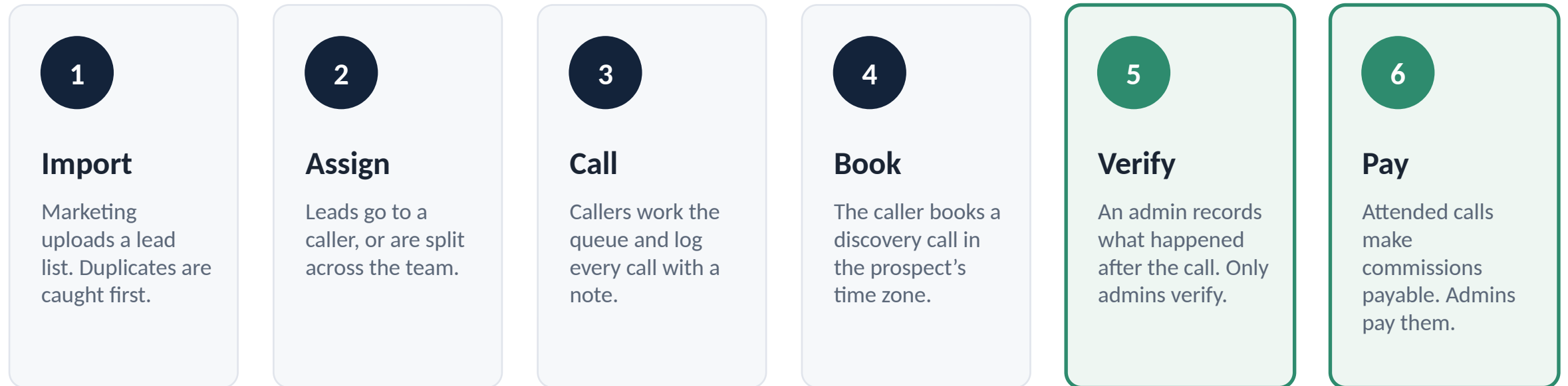
For: Admins and the super admin

www.accuprimeflow.com



Verification is your job

Only admins record whether a discovery call happened. Commissions depend on it.



Only admins verify discovery calls. Callers and marketing never mark a call attended; commissions become payable only after an admin does.

The Verification screen

1

Calls whose time has passed wait in "To verify".

- The menu badge shows how many are waiting.
- Calls waiting a day or more are flagged.
- Other tabs: Awaiting a decision, Upcoming, Verified.
- A reminder email goes to admins at 9 PM Eastern while any are waiting.

Verification

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Record what happened on each discovery call once its time has passed. Attended and won calls make commissions payable; a no-show sends the prospect back to the caller to follow up.

To verify 2

Awaiting a decision 1

Upcoming 2

Verified 2

Discovery call	Prospect	Booked by	Attending	
Thu, Sep 24, 10:24 PM EDT	Lakeside Dental Priya Shah	Ruth Lagahit	Owner and office manager Meeting link	AttendedNo-showRescheduledWon
Fri, Sep 25, 1:24 PM EDT	Cedar Point Therapy Noah Price	Ana Cruz	Owner and office manager Meeting link	AttendedNo-showRescheduledWon

Attended

Priva Shah

Ruth Lagahit

Meeting link

Mark Lakeside Dental attended?

Thu, Sep 24, 10:24 PM EDT, booked by Ruth Lagahit.

Commissions that become payable:

- Ruth Lagahit: **\$15.00** for booking the call
- Sean Nolasco: **\$40.00** team rate per attended call

Note (optional)

Cancel

Mark attended

2

The prospect joined the call.

- The confirmation lists exactly who gets paid and how much.
- Those commissions become payable immediately.
- The prospect moves to "Attended", waiting for a decision.

No-show

Phya Chan [meeting link](#)

Mark Lakeside Dental as a no-show?

Thu, Sep 24, 10:24 PM EDT, booked by Ruth Lagahit.

Ruth Lagahit's pending commission on this call is voided. Lakeside Dental goes back to Ruth Lagahit to follow up today.

Note

3

The prospect didn't join.

- Waiting commissions for this call are cancelled. Nobody is paid.
- The lead goes back to the caller to follow up today.
- Add a note if it helps the caller.

Rescheduled

Reschedule Lakeside Dental

Thu, Sep 24, 10:24 PM EDT, booked by Ruth Lagahit.

New date	Time	In
09/29/2026 	02:00 PM 	Their time (MT) 

Tue, Sep 29, 4:00 PM EDT

The caller's pending commission moves to the new date.

Note (optional)

Cancel

Reschedule

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The call moved to a new date.

- Enter the new date and time; the Eastern time is shown.
- The waiting commissions move to the new call.
- It shows in Upcoming until the new time passes.

Won

Prospect Booked by Attending

Lakeside Dental: engagement won

Thu, Sep 24, 10:24 PM EDT, booked by Ruth Lagahit.

Monthly fee (\$) One-off setup fee (\$)

Deal value: \$20,000.00 (12 × \$1,500.00 + \$2,000.00 setup)

Commissions that become payable:

- Ruth Lagahit: **\$15.00** for booking the call
- Sean Nolasco: **\$40.00** team rate per attended call
- Sean Nolasco: **\$1,000.00** (5% of \$20,000.00)

Note (optional)

5

The prospect signed.

- Enter the monthly fee and the setup fee.
- Deal value = 12 months of the monthly fee + the setup fee (changeable in Settings).
- Percentage and deal-won commissions are worked out and shown before you confirm.

What each result does



Pick the result that matches what really happened. Corrections need a written reason.

Attended

Commissions become payable. The prospect waits for a decision.

No-show

Commissions cancelled. The lead goes back to the caller.

Rescheduled

New date. Waiting commissions move with it.

Proposal sent

A proposal is out. It moves to "Awaiting a decision".

Won

Deal value recorded. Won commissions created and payable.

Lost

Closed as lost. Attended commissions stay earned.

Pay commissions

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Pay a selection as one payout.

- Payable, Waiting and Paid tabs, with totals per person.
- "Select all" for a person, then "Mark paid". Add the transfer reference as a note.
- This records the payment; it doesn't move money.
- A payment made by mistake can be reversed, with a reason.

Mark \$1,120.00 paid?

- Sean Nolasco: **\$1,120.00** (4 commissions)

Payment note (optional, e.g. the transfer reference)

This records the payout in AccuprimeFlow. It doesn't move any money.

Cancel

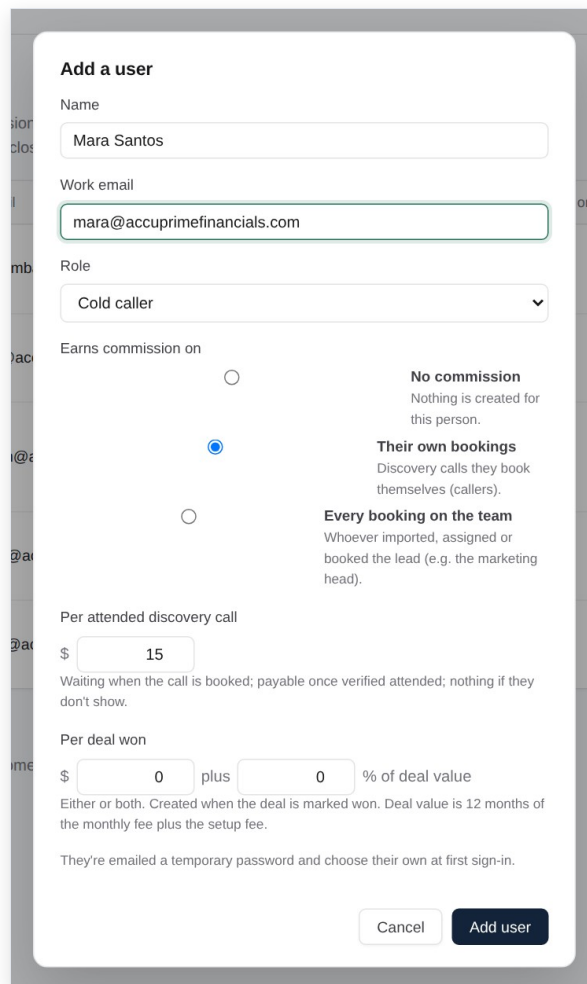
Mark \$1,120.00 paid

Add people

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Add each team member and set their commission.

- Name, work email and role. They're emailed a temporary password.
- Commission: none, their own bookings, or every booking on the team.
- \$ per attended call, and \$ and/or % per deal won.
- Reset password, deactivate, or delete someone with no history.



Add a user

Name

Work email

Role

Earns commission on

☐ **No commission**
Nothing is created for this person.

☒ **Their own bookings**
Discovery calls they book themselves (callers).

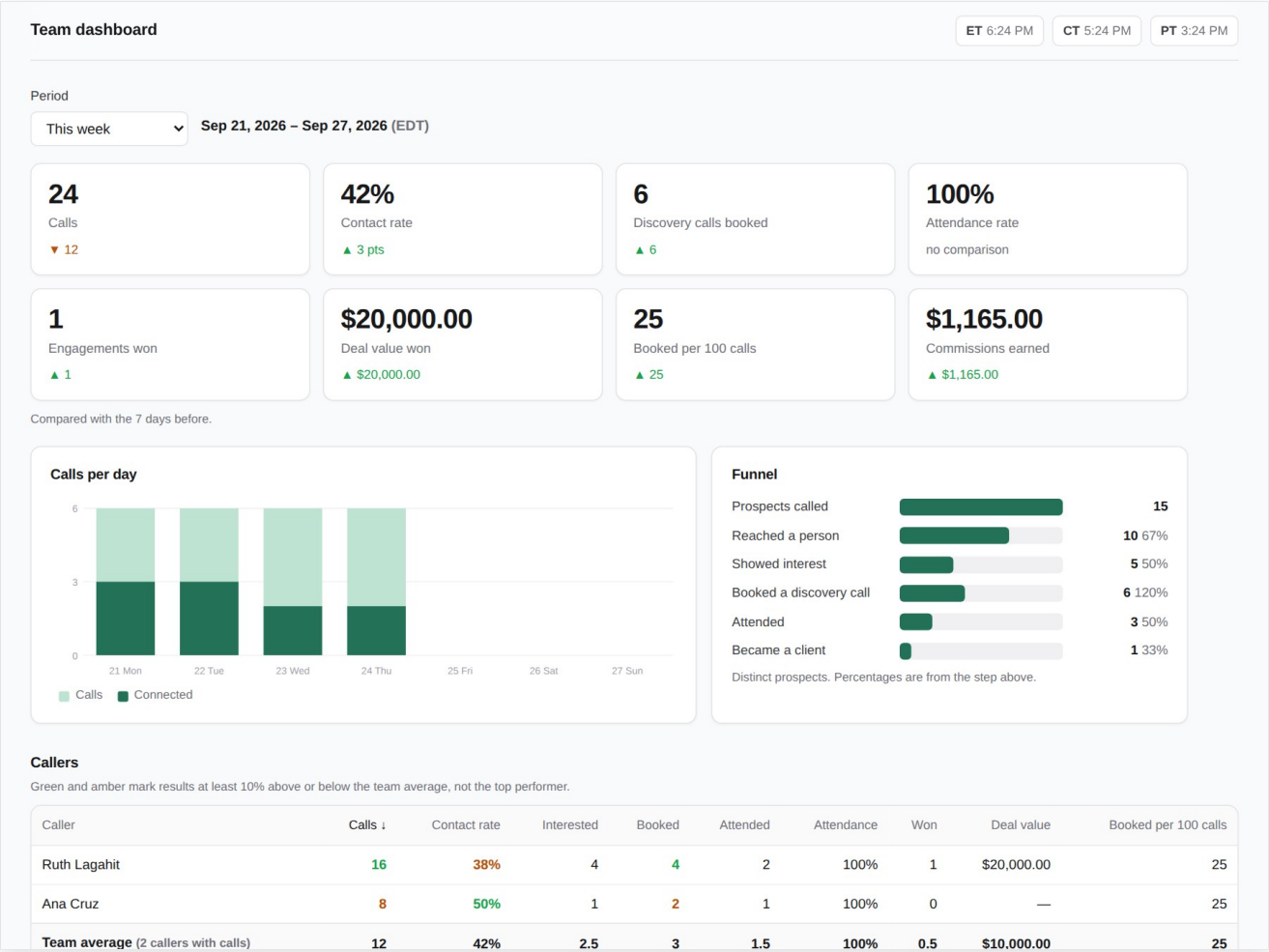
☐ **Every booking on the team**
Whoever imported, assigned or booked the lead (e.g. the marketing head).

Per attended discovery call
\$
Waiting when the call is booked; payable once verified attended; nothing if they don't show.

Per deal won
\$ plus % of deal value
Either or both. Created when the deal is marked won. Deal value is 12 months of the monthly fee plus the setup fee.

They're emailed a temporary password and choose their own at first sign-in.

Dashboard and reports



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See how the team is doing, and export it.

- Team dashboard: calls, contact rate, bookings, attendance, won and commissions, against the period before.
- Six reports, each exported to Excel, PDF or CSV.
- Daily, weekly and monthly summaries arrive by email.

Admin routine

Every day

Clear "To verify" before the end of the day. Check the 9 PM reminder if anything is left.

Every week

Read the weekly summary. Pay payable commissions, adding the transfer reference.

Every month

Read the monthly summary. Run the commission ledger for finance.

New starter

Add them in Users with the right role and commission.

Leaver

Deactivate them. Their open leads return to the pool.

Something wrong

Settings shows email status and the build. Correct results with a reason.

Questions?

Super admin RB Gumban, rbgumban@accuprimefinancials.com

Settings business rules, email schedule and system status.

Help page www.accuprimeflow.com/help.html