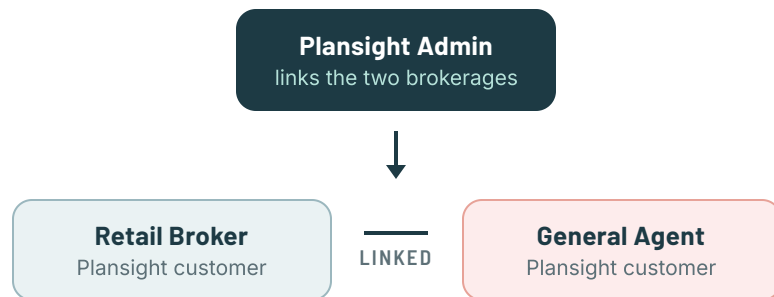


1 CONNECT

Plansight links the Retail Broker and the GA

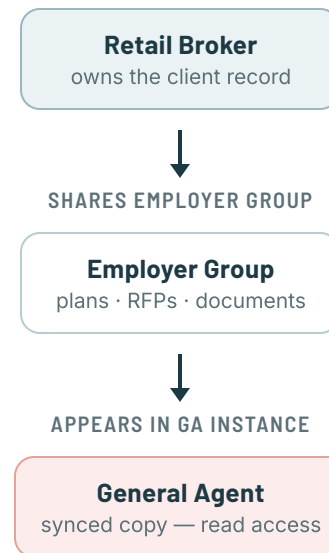
In the admin section we provision the GA as a connected agent on the Retail Broker's instance. This is a one-time setup per brokerage relationship.



2 SHARE

Retail Broker shares an Employer Group with the GA

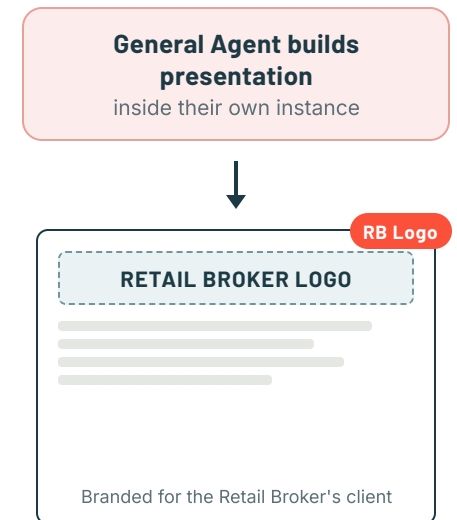
The Retail Broker chooses which employer groups to share. Each shared group appears in the GA's instance as a synced copy — all plan docs, RFP history, and assets included.



3 BRAND

GA builds a presentation – Retail Broker's logo auto-pulls

When the GA generates a presentation for a shared employer, Plansight automatically swaps in the Retail Broker's logo (not the GA's). This is already live — no engineering needed.



Where to manage the link: Plansight Admin → Brokerage → Connected Agents. Adding the GA here is the prerequisite for any sharing.

Granularity of sharing: Either all employer groups, or a hand-picked list — chosen on the Retail Broker's side, not the GA's.

Logo logic, code-confirmed:

Brokerage::sharedBrokerageLogos() swaps the GA's logo for the source broker's whenever `ga = 1` and a `sharedBrokerageId` is set. Office logo overrides still win.