

Internal Portal — The Colleague Console

Fifteen internal personas running payroll, benefits, billing, support, and sales.

The Internal Portal (the Colleague Console) is where your PEO's own staff run the business — 15 internal roles, each with a purpose-built cockpit and least-privilege access, sharing one operational picture across payroll, benefits, billing, support, implementation, and sales.

1 The personas — 15 internal roles

Persona group	Roles & what they run
Platform & IAM	platform_admin (rate card, tax integrations, global config); iam_admin (users, roles, access).
Payroll & tax	payroll_ops (runs, off-cycle, funding); tax_specialist (deposits, filings, registrations).
HR & implementation	peo_hr_admin (HR master data, leave, WC); implementation_specialist (client onboarding + migration).
Client & billing	account_manager (client terms, relationship); billing_ops (credits, collections, dunning).
Support	t1_customer_support , t2_customer_support , plus specialist queues support_benefits , support_retirement , support_insurance .
Sales	sales_rep , sales_manager (pipeline, quoting, forecast).

2 Built for the desk, not just the record

The work surfaces itself

- A **morning rollup**, **money queues** (deposits, filings, and remittances coming due, with trust-cash backing shown), and an **offboarding cockpit** — operators see what needs doing instead of searching for it.
- Every screen is scoped to the operator's specific role; a support agent and a payroll operator open different consoles from the same login model, and neither can reach the other's writes.