



CREATOR PERFORMANCE MANAGEMENT PLATFORM · ENGLISH

Agency & Team Manual

Guide for Owner, Admin, Account Manager, Finance, and Viewer, including Brand authorization, Performance, and shared reports

- Eight canonical
/agency/dashboard tabs
- Consent, per-Brand
capability, and RBAC
- Commission, payout,
SOW, and white-label
reports

VERSION	UPDATED	ROLE	STATUS
6.0	24 August 2026	agency	Current-product reference

BEFORE YOU BEGIN

Scope and how to use this guide

Agency Owners, Admins, Account Managers, Finance users, Viewers, and invite recipients

ACCESS

Agency accounts use Agency Portal and Profile. Merchant or Creator members may also see Agency Portal according to membership.

SOURCE OF TRUTH

This manual set was checked against current routes, navigation, permission gates, and product functions as of 24 August 2026. Some modules depend on sub-role, plan, verification, Brand approval, and feature availability. Treat server authorization and live confirmation copy as final.

Money and tax

This guide explains product workflows, not legal, tax, or accounting advice. Rates, fees, and payment methods may vary by plan, country, account state, and enabled providers. Always review the live quote before confirming.

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02 Agency team permission matrix

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07 Commission ledger, payouts, and statements

08 SOW, campaign reports, and white-label links

09 Feature availability and fail-closed states

10 Profile, security, and escalation

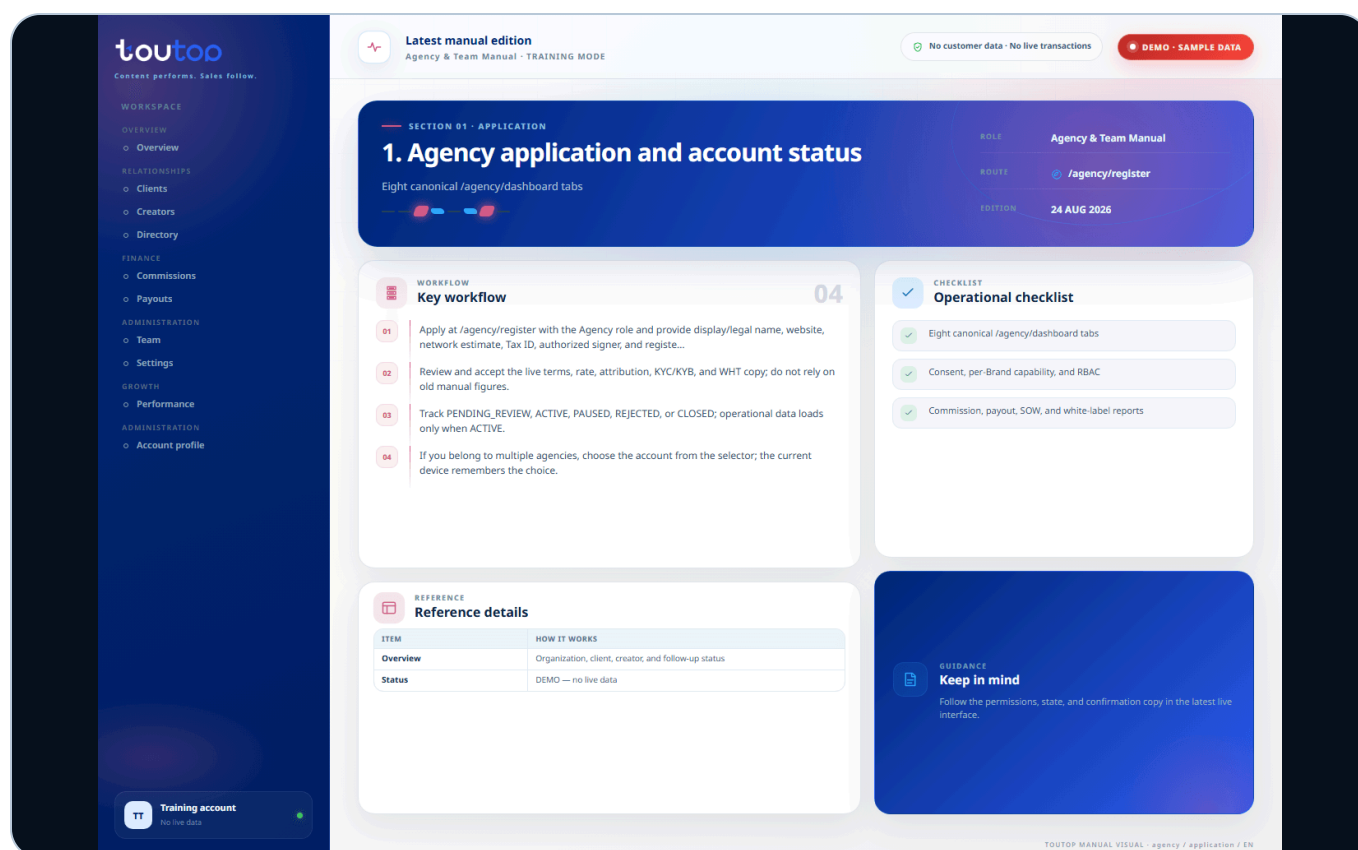
Current navigation and routes

Mobile labels may be shortened while behavior and URLs remain. Treat visible navigation as an initial access cue and server permission as the final authority.

Group	Page	URL	Purpose
Overview	Overview	/agency/dashboard	Organization, client, creator, and follow-up status
Relationships	Clients	/agency/dashboard/clients	Brand relationships and authorization
Relationships	Creators	/agency/dashboard/creators	Creator relationships and consent
Relationships	Directory	/agency/dashboard/directory	Discover and invite relationships correctly
Finance	Commissions	/agency/dashboard/commissions	Traceable commission ledger
Finance	Payouts	/agency/dashboard/payouts	Payouts and CSV/PDF statements
Administration	Team	/agency/dashboard/team	Members, roles, and assignments
Administration	Settings	/agency/dashboard/settings	Organization data, terms, and permitted settings
Growth	Performance	/performance	Authorized Brand selector and TopMatch/Flow/Rights/Guard/CRM
Administration	Account profile	/profile	Account/security only; a dedicated Agency profile is not yet complete

1. Agency application and account status

- 1 Apply at /agency/register with the Agency role and provide display/legal name, website, network estimate, Tax ID, authorized signer, and registered address.
- 2 Review and accept the live terms, rate, attribution, KYC/KYB, and WHT copy; do not rely on old manual figures.
- 3 Track PENDING_REVIEW, ACTIVE, PAUSED, REJECTED, or CLOSED; operational data loads only when ACTIVE.
- 4 If you belong to multiple agencies, choose the account from the selector; the current device remembers the choice.



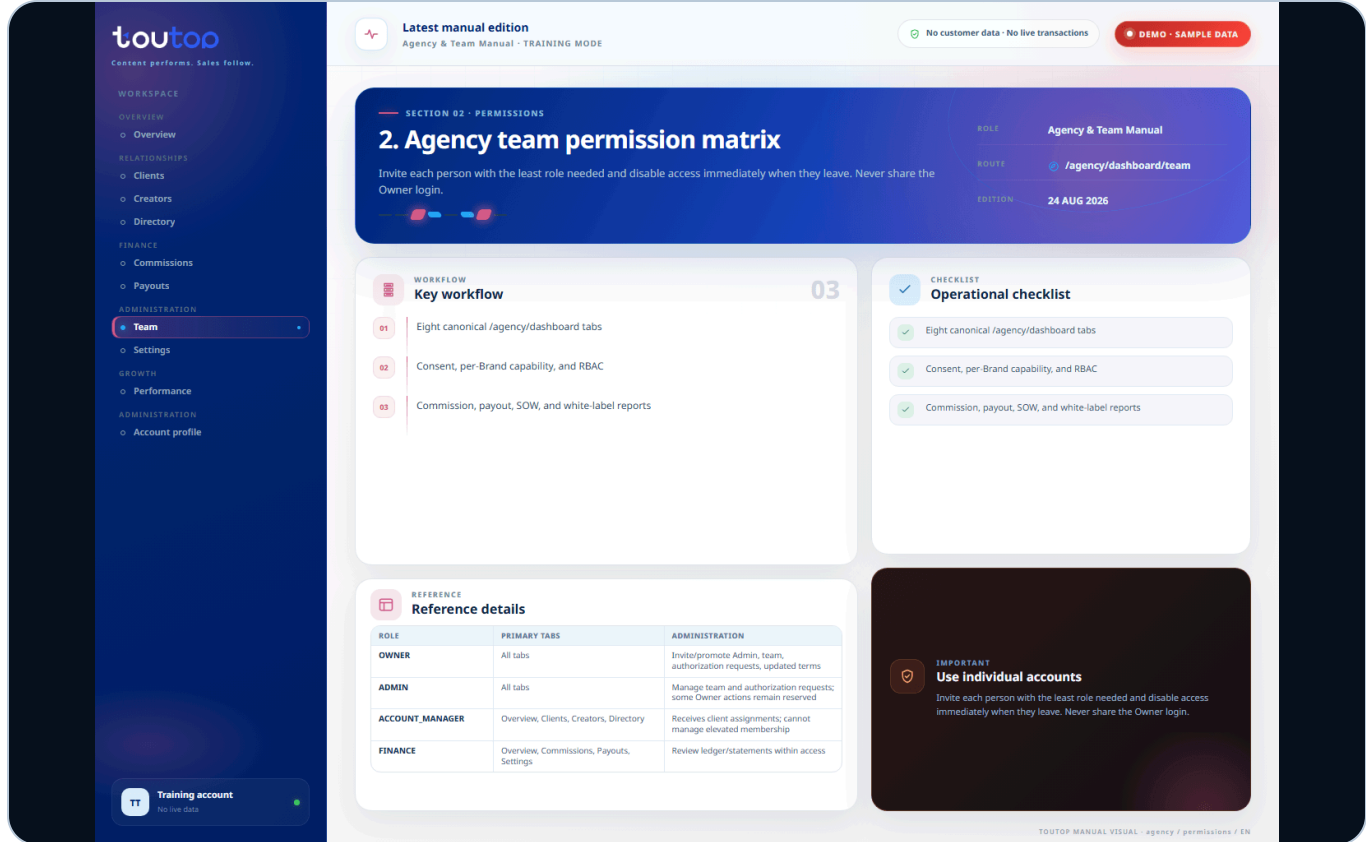
DEMO screen: Agency application and account status

2. Agency team permission matrix

Role	Primary tabs	Administration
OWNER	All tabs	Invite/promote Admin, team, authorization requests, updated terms
ADMIN	All tabs	Manage team and authorization requests; some Owner actions remain reserved
ACCOUNT_MANAGER	Overview, Clients, Creators, Directory	Receives client assignments; cannot manage elevated membership
FINANCE	Overview, Commissions, Payouts, Settings	Review ledger/statements within access
VIEWER	Overview	Read-only within server-provided scope

Use individual accounts

Invite each person with the least role needed and disable access immediately when they leave.
Never share the Owner login.



DEMO screen: Agency team permission matrix

3. Overview and canonical routes

- Track active clients/influencers, pending/available/locked commission, eligible GMV, lifetime paid, and next payout.
- Use the values shown in the current rule for acceptance, attribution window, hold period, and commission.
- Open the ledger or payout batch for held/failed warnings; do not calculate net amounts manually.
- The six-month trend is operational insight, not an accounting statement.
- Use /agency/dashboard and its eight tab paths as canonical routes; /partner is a legacy redirect.
- Select the correct organization before reading totals, clients, or authorization; multi-Agency users must check the selector each time.

The screenshot displays the 'TouTop' interface in 'TRAINING MODE'. The left sidebar shows a navigation menu with sections like WORKSPACE, OVERVIEW, RELATIONSHIPS, FINANCE, ADMINISTRATION, GROWTH, and ADMINISTRATION. The main content area is titled '3. Overview and canonical routes' and includes a 'Key workflow' section with five steps, an 'Operational checklist' with six items, and a 'Reference details' table. A 'Keep in mind' box at the bottom right provides additional guidance.

Key workflow

- Track active clients/influencers, pending/available/locked commission, eligible GMV, lifetime paid, and next payout.
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Operational checklist

- Track active clients/influencers, pending/available/locked commission, eligible GMV, lifetime paid, and next payout.
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- Use /agency/dashboard and its eight tab paths as canonical routes; /partner is a legacy redirect.

Reference details

ITEM	HOW IT WORKS
Overview	Organization, client, creator, and follow-up status
Status	DEMO — no live data

Keep in mind

Follow the permissions, state, and confirmation copy in the latest live interface.

DEMO screen: Overview and canonical routes

4. Consent and per-Brand operational access

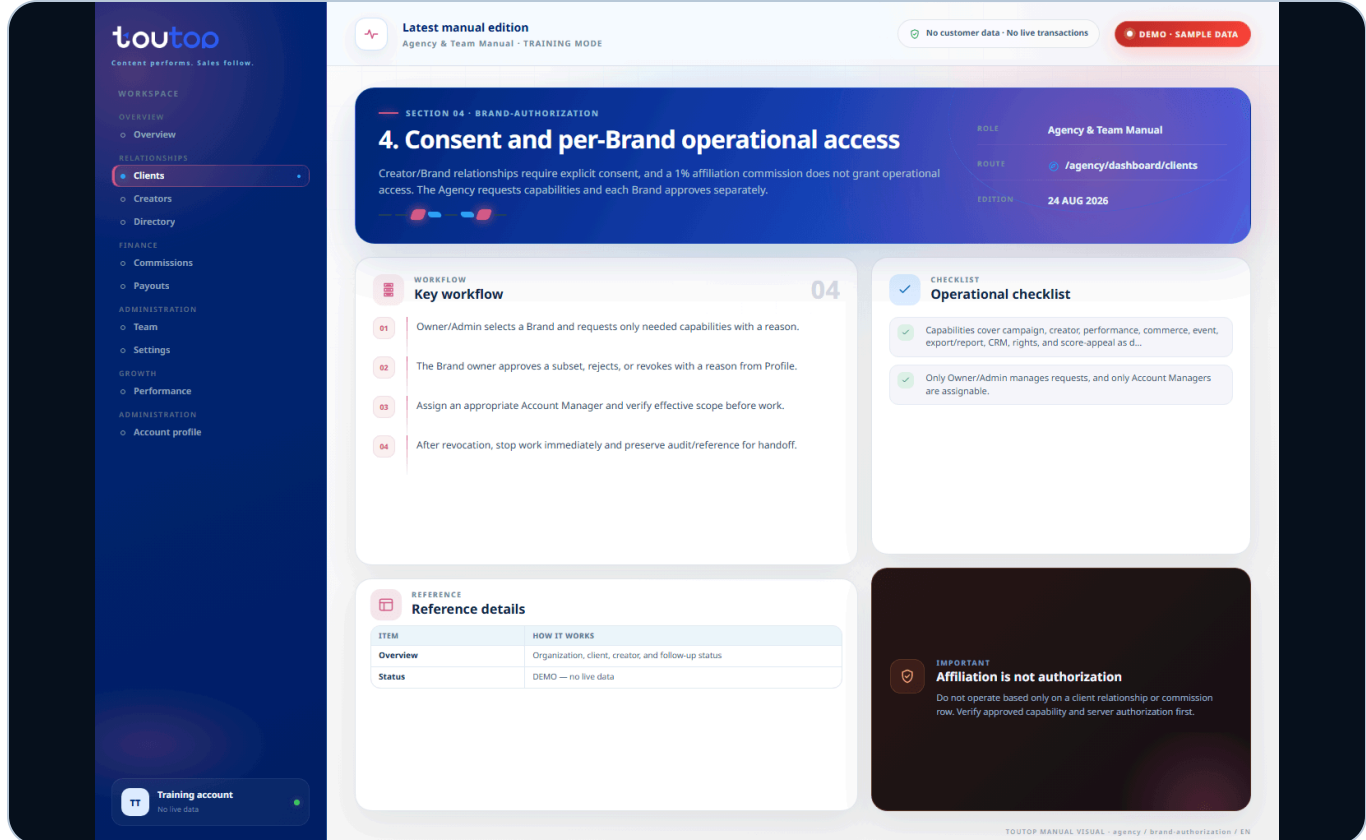
Creator/Brand relationships require explicit consent, and a 1% affiliation commission does not grant operational access. The Agency requests capabilities and each Brand approves separately.

- 1 Owner/Admin selects a Brand and requests only needed capabilities with a reason.
- 2 The Brand owner approves a subset, rejects, or revokes with a reason from Profile.
- 3 Assign an appropriate Account Manager and verify effective scope before work.
- 4 After revocation, stop work immediately and preserve audit/reference for handoff.

- Capabilities cover campaign, creator, performance, commerce, event, export/report, CRM, rights, and score-appeal as displayed.
- Only Owner/Admin manages requests, and only Account Managers are assignable.

Affiliation is not authorization

Do not operate based only on a client relationship or commission row. Verify approved capability and server authorization first.



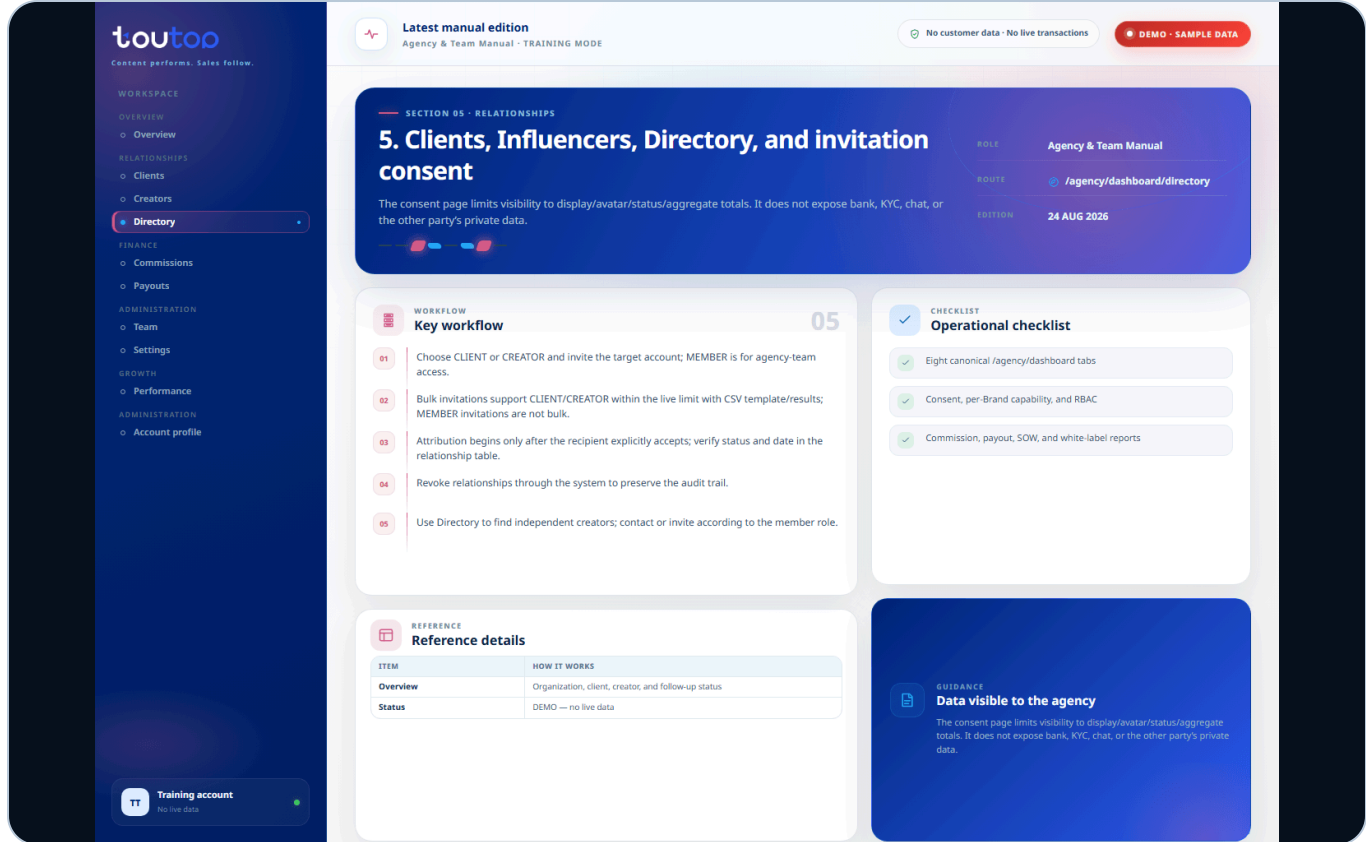
DEMO screen: Consent and per-Brand operational access

5. Clients, Influencers, Directory, and invitation consent

- 1 Choose CLIENT or CREATOR and invite the target account; MEMBER is for agency-team access.
- 2 Bulk invitations support CLIENT/CREATOR within the live limit with CSV template/results; MEMBER invitations are not bulk.
- 3 Attribution begins only after the recipient explicitly accepts; verify status and date in the relationship table.
- 4 Revoke relationships through the system to preserve the audit trail.
- 5 Use Directory to find independent creators; contact or invite according to the member role.
- 6 Use Directory to discover, then send invitation/consent in the system and wait for confirmed status.
- 7 Do not place creators/clients into private workspaces or reports before relevant consent and authorization.

Data visible to the agency

The consent page limits visibility to display/avatar/status/aggregate totals. It does not expose bank, KYC, chat, or the other party's private data.



DEMO screen: Clients, Influencers, Directory, and invitation consent

6. Agency Performance Workspace

Agency users select an Agency organization and Authorized Brand before work. Each module is gated by team role and Brand capability.

- 1

Confirm organization and Brand selector.
- 2

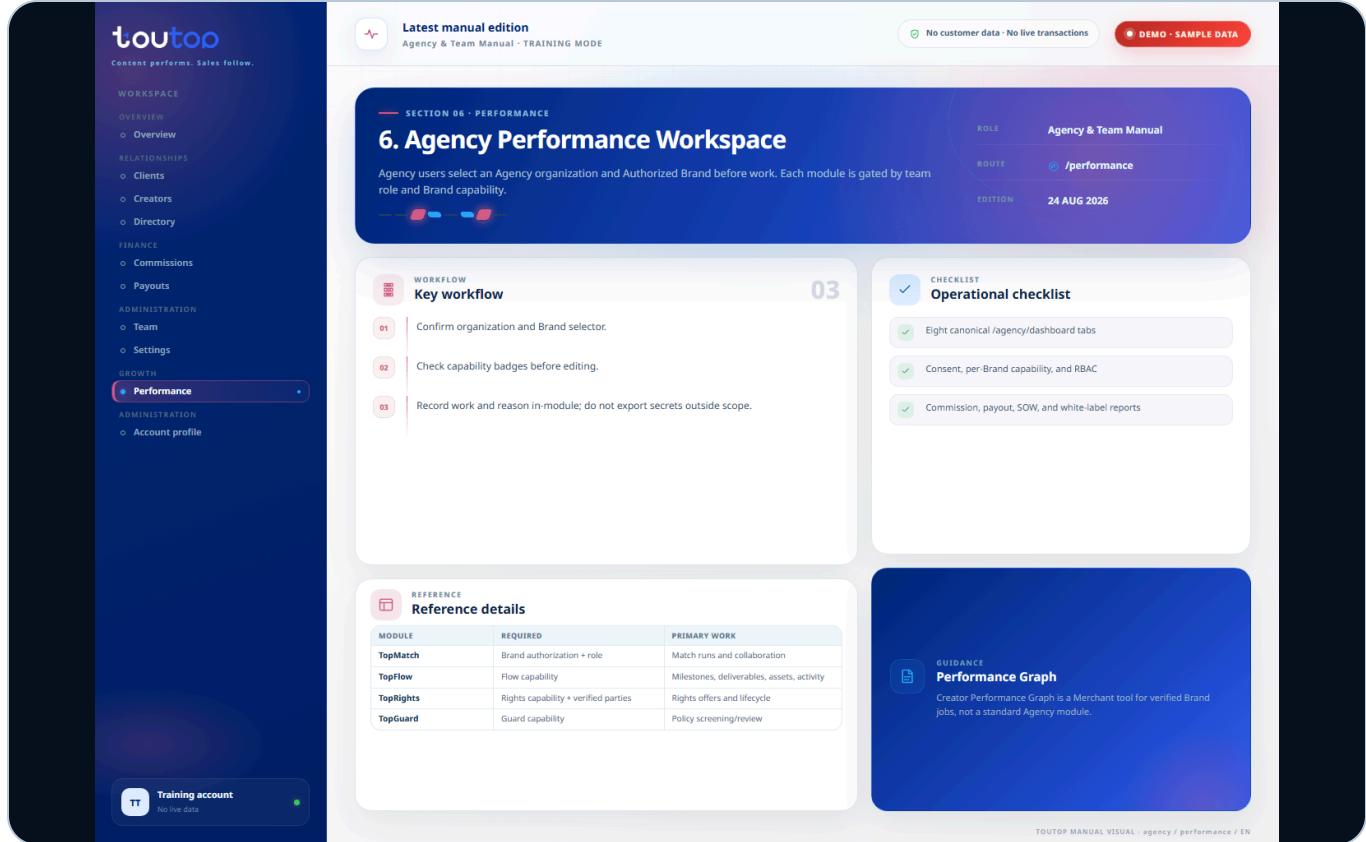
Check capability badges before editing.
- 3

Record work and reason in-module; do not export secrets outside scope.

Module	Required	Primary work
TopMatch	Brand authorization + role	Match runs and collaboration
TopFlow	Flow capability	Milestones, deliverables, assets, activity
TopRights	Rights capability + verified parties	Rights offers and lifecycle
TopGuard	Guard capability	Policy screening/review
TopCRM	Team-role gate + Brand scope	Relationship pool, task, next action

Performance Graph

Creator Performance Graph is a Merchant tool for verified Brand jobs, not a standard Agency module.



DEMO screen: Agency Performance Workspace

7. Commission ledger, payouts, and statements

- Commissions is an immutable ledger showing job, side, base, rate, amount, status, and date. A spreadsheet edit does not change the system ledger.
- Payouts show gross, withholding, net, and status; PAID occurs only when the linked withdrawal completes.
- Download the statement CSV/PDF for the required batch and retain it with bank and tax records.
- Settings requires an approved payout bank owned by the owner according to readiness.
- Terms must be current before invitations or payouts; only the OWNER can accept new terms.
- Commission entries form an immutable ledger tied to verified release traces; do not reinterpret them in an external file.
- Export payout statements to CSV/PDF within access; verify period, currency, status, and totals before sharing.

toutop
Content performs. Sales follow.

WORKSPACE

- OVERVIEW
- RELATIONSHIPS
- FINANCE
- ADMINISTRATION
- GROWTH
- ADMINISTRATION

Commissions

Payouts

Team

Settings

Performance

Account profile

Training account

Latest manual edition
Agency & Team Manual - TRAINING MODE

No customer data - No live transactions

DEMO - SAMPLE DATA

SECTION 07 - FINANCE

7. Commission ledger, payouts, and statements

Eight canonical /agency/dashboard tabs

ROLE: Agency & Team Manual

ROUTE: /agency/dashboard/commissions

VERSION: 24 AUG 2026

WORKFLOW

Key workflow

05

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CHECKLIST

Operational checklist

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REFERENCE

Reference details

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GUIDANCE

Keep in mind

Follow the permissions, state, and confirmation copy in the latest live interface.

TOUTOP MANUAL VISUAL - agency / finance / EN

DEMO screen: Commission ledger, payouts, and statements

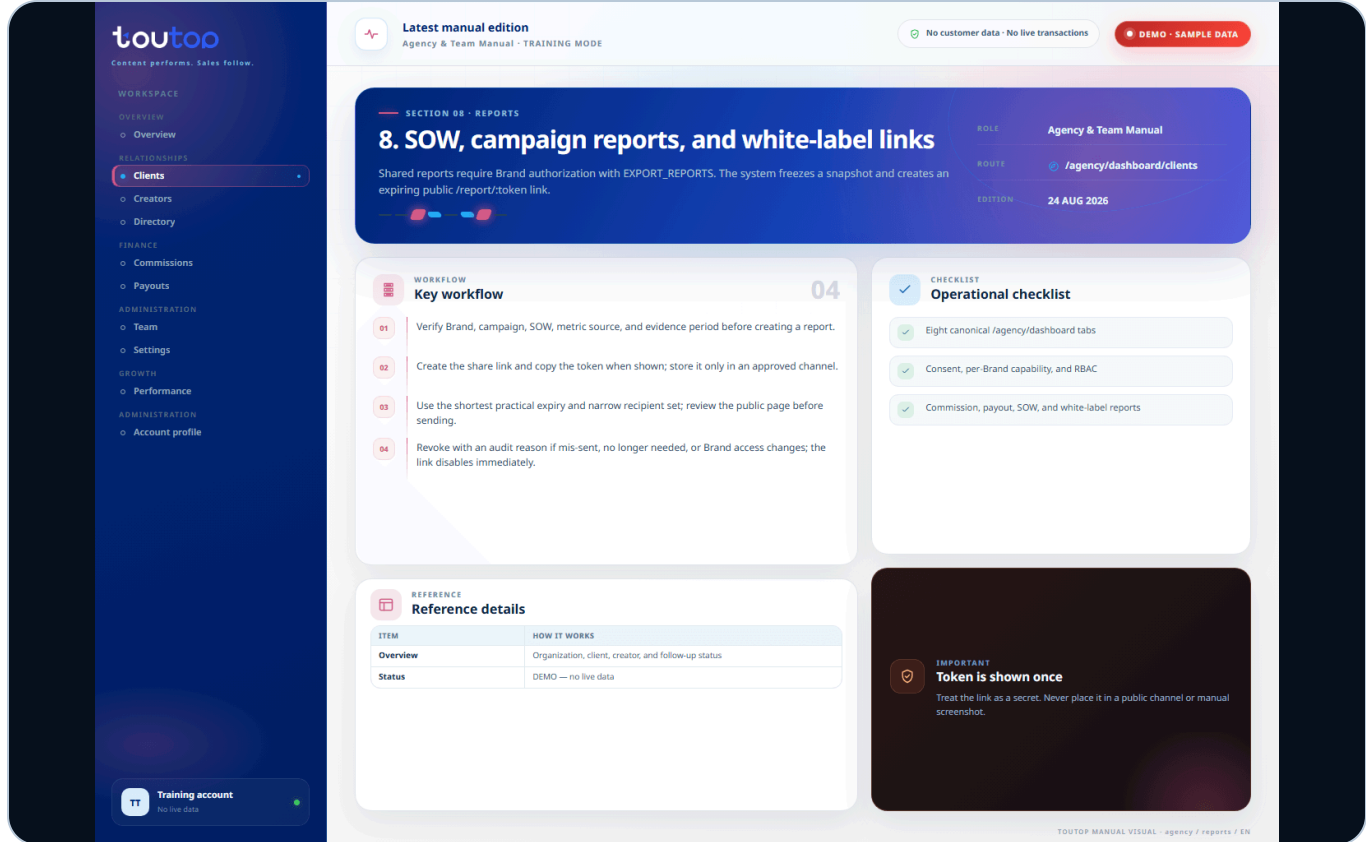
8. SOW, campaign reports, and white-label links

Shared reports require Brand authorization with EXPORT_REPORTS. The system freezes a snapshot and creates an expiring public /report/:token link.

- 1 Verify Brand, campaign, SOW, metric source, and evidence period before creating a report.
- 2 Create the share link and copy the token when shown; store it only in an approved channel.
- 3 Use the shortest practical expiry and narrow recipient set; review the public page before sending.
- 4 Revoke with an audit reason if mis-sent, no longer needed, or Brand access changes; the link disables immediately.

Token is shown once

Treat the link as a secret. Never place it in a public channel or manual screenshot.



DEMO screen: SOW, campaign reports, and white-label links

9. Feature availability and fail-closed states

When a tab/action is unavailable, the system should expose the missing membership, role, capability, verification, or provider state and fail closed without overexposing data or mutation.

- Check Agency membership and role first.
- Check Brand authorization/effective capability and Account Manager assignment.
- Check feature availability, verification, and provider status.
- Send a redacted reference ID and error to Support if still inconsistent.

Do not infer access from UI alone

A visible menu or metric does not replace server authorization; never use a direct URL to bypass a gate.

Workspace

- Overview
- Relationships
 - Clients
 - Creators
 - Directory
- Finance
 - Commissions
 - Payouts
- Administration
 - Team
 - Settings
- Growth
 - Performance
- Administration
 - Account profile

TT Training account
No live data

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Agency & Team Manual - TRAINING MODE

No customer data - No live transactions

DEMO - SAMPLE DATA

SECTION 09 - AVAILABILITY

9. Feature availability and fail-closed states

When a tab/action is unavailable, the system should expose the missing membership, role, capability, verification, or provider state and fail closed without overexposing data or mutation.

ROLE: Agency & Team Manual
ROUTE: /agency/dashboard
EDITION: 24 AUG 2026

WORKFLOW

Key workflow

04

- 01 Check Agency membership and role first.
- 02 Check Brand authorization/effective capability and Account Manager assignment.
- 03 Check feature availability, verification, and provider status.
- 04 Send a redacted reference ID and error to Support if still inconsistent.

CHECKLIST

Operational checklist

- ✓ Check Agency membership and role first.
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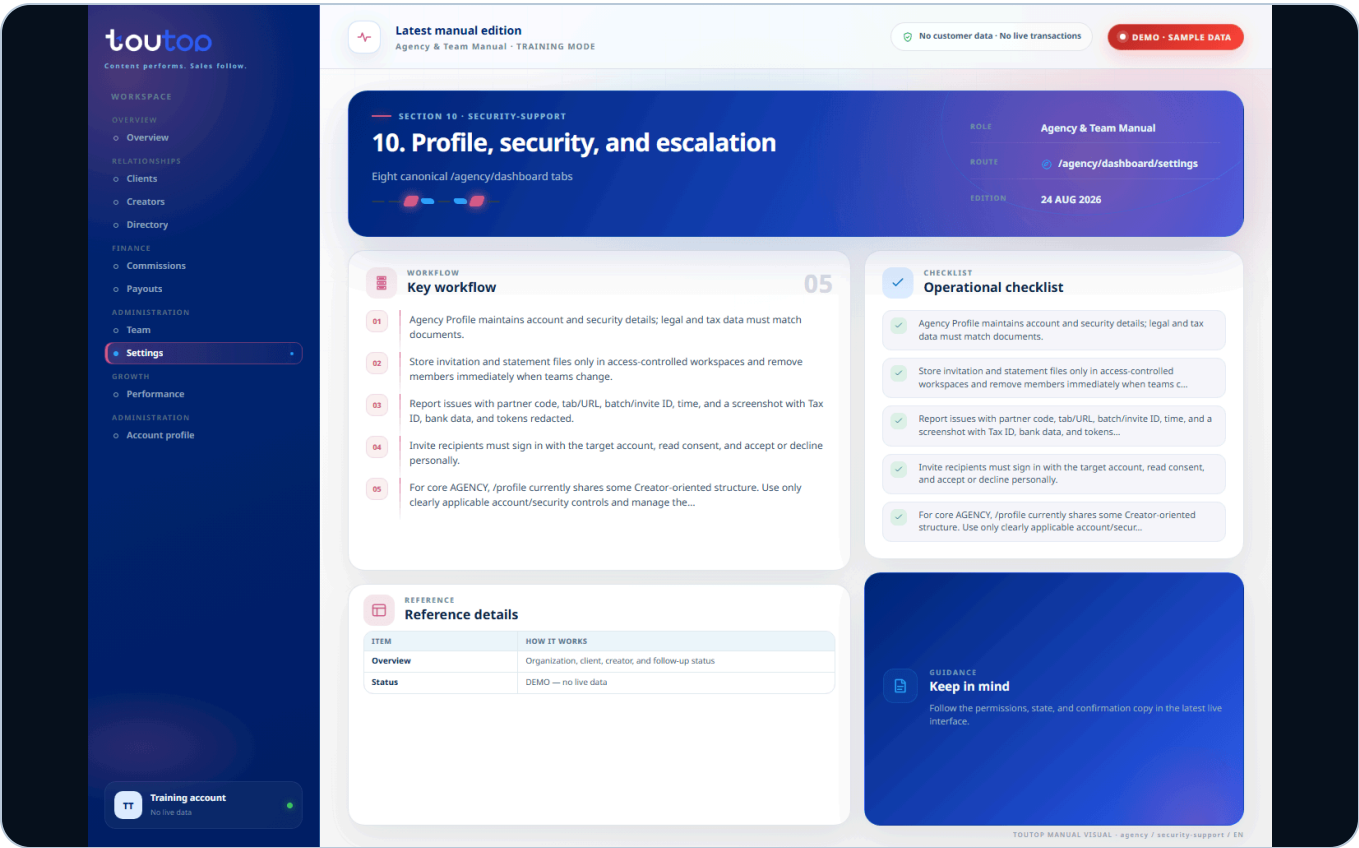
IMPORTANT
Do not infer access from UI alone
A visible menu or metric does not replace server authorization; never use a direct URL to bypass a gate.

TOUTOP MANUAL VISUAL - agency / availability / EN

DEMO screen: Feature availability and fail-closed states

10. Profile, security, and escalation

- Agency Profile maintains account and security details; legal and tax data must match documents.
- Store invitation and statement files only in access-controlled workspaces and remove members immediately when teams change.
- Report issues with partner code, tab/URL, batch/invite ID, time, and a screenshot with Tax ID, bank data, and tokens redacted.
- Invite recipients must sign in with the target account, read consent, and accept or decline personally.
- For core AGENCY, /profile currently shares some Creator-oriented structure. Use only clearly applicable account/security controls and manage the organization in Settings.



DEMO screen: Profile, security, and escalation

Common symptoms and what to do

A tab is missing

Check the member role and selected agency account; tabs are filtered by permission.

Invitation did not start attribution

Confirm the recipient opened the token with the target account and accepted.

Commission or payout is hidden

Read the capability, terms, or readiness warning; stop duplicate financial actions and contact Support.

END OF GUIDE

Get help safely

Send the route, reference ID, time, expected versus actual result, and a redacted screenshot. Never send passwords, OTPs, tokens, KYC documents, or full bank details.

support@tuatop.com

<https://status.tuatop.com>

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