

LEADERSlink

Home Office Requests: How to Add or Drop a State License Registration

There are many reasons why you may need to change the states where you are licensed: You may have a client that moves to a state where you are not currently doing business, you may decide to start soliciting clients in a new state, you may decide to no longer work in a certain state, etc. The Leaderslink system makes this an easy process to complete. The following instructions will walk you through the process of changing your state licensing, using the Home Office Request function.

Step 1: Log in to Leaderslink (if you do not have a login, or do not know how to login, please reach out to support@leadersgroup.net)

Step 2: Navigate to the 'Home Office Requests' tab:

The screenshot displays the Leaderslink dashboard interface. The top navigation bar includes 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (highlighted), 'Compliance Approvals', and 'Books & Records Docs'. The main content area is divided into several sections:

- Dashboard:** As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor. Includes a 'Refresh' button.
- Compensation Overview:** A table showing financial metrics.

Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0
- Compensation Activity:** A table showing weekly and quarterly activity.

Current Week (Net):	\$0
Previous Week (Net):	\$0
Month-to-Date (Net):	\$0
Quarter-to-Date (Net):	\$0
Year-to-Date (Net):	\$0
- Hold/Suspense Report:** A table showing client holds and commission proration.

Client	Hold Reason	Sum of Commission Proration
		0.00
- My Tasks:** A section with a 'New' button and a message: 'You have no open tasks scheduled for this period.'
- Calendar:** A section with a 'New Event' button and a message: 'You have no events scheduled for the next 7 days.' Includes a calendar view for October 2017.

Step 3: Click 'Create New Home Office Request':

Home Office Requests
Home

View: All Go! Clone | Create New View

Recent Home Office Requests [Create New Home Office Request](#)

Home Office Request

- [CMP-2617](#)
- [CMP-2571](#)
- [CMP-0070](#)
- [CMP-2570](#)
- [CMP-0060](#)
- [CMP-0067](#)
- [CMP-0057](#)
- [CMP-0068](#)
- [CMP-0069](#)

Step 4: Select the type of home office request you would like to submit. In this case, select "Advisor Request to Add / Drop State Registrations"

New Home Office Request
Select Home Office Request Record Type

Select a record type for the new home office request.

Select Home Office Request Record Type

Record Type of new record: **Advisor Request to Add / Drop State Registrations**

- Advisor Request to Add / Drop State Registrations
- Add/Change Authorized User
- Advisor Request to Add / Drop State Registrations
- Update Bank EFT Information
- Update Contact Information

Available Home Office Request Record Types

Record Type Name	Description
Add/Change Authorized User	Please use this form to grant access or remove access to your commissions information, logins and passwords associated with The Leaders Group.
Advisor Request to Add / Drop State Registrations	
Update Bank EFT Information	Use this to change the bank account where you receive your commission payments.
Update Contact Information	Use this to change your Business Address, Home Address, or Phone Numbers.

Step 5: Once your selection has been made, click 'Continue'

Step 6: At the following screen, complete the form with applicable information. Please note any fields marked with a red bar, must be filled out

Home Office Request Edit
New Home Office Request

Home Office Request Edit Save Save & New Cancel

Information
Advisor [Red Bar] Record Type Advisor Request to Add / Drop State Registrations

Add State Registration
Do you want to add one or more states?
Is business pending?
State Available Chosen
AK AL AR
Effective Registration Date [11/3/2017]
Preferred Payment Method --None--

Drop State Registration
Do you want to drop one or more states?
States to Drop Registration Available Chosen
AK AL AR

Save Save & New Cancel

Step 7: Once the fields are filled out, click 'save'

Step 8: Review your form to make sure everything is filled out completely and correctly, then click 'Submit Approval'

Home Office Request
CMP-4519

Home Office Request has been saved.

Back to List: Home Office Requests

Notes & Attachments [0] | Approval History [0]

Home Office Request Detail Edit Delete Submit for Approval

Home Office Request CMP-4519 Record Type Advisor Request to Add / Drop State Registrations [Ch
Advisor Bill Advisor

Add State Registration
Do you want to add one or more states?
Is business pending?
State AK
Effective Registration Date 11/3/2017
Preferred Payment Method Credit Card

Drop State Registration
Do you want to drop one or more states?
States to Drop Registration ME
Created By Bill Advisor, 11/3/2017 12:37 PM Last Modified By Bill Advisor, 11/3/2017 12:37 PM

Edit Delete Submit for Approval

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Step 9: To check on the status of a request, scroll down to ‘Approval History’

Home Office Request
CMP-4519 Printable View
[Back to List: Home Office Requests](#)

Notes & Attachments [0] | Approval History [2]

Home Office Request Detail [Edit] [Delete]

Home Office Request: CMP-4519 Record Type: Advisor Request to Add / Drop State Registrations [\[Change\]](#)
 Advisor: [Bill Advisor](#)

Add State Registration

Do you want to add one or more states?
 Is business pending?
 State: AK
 Effective Registration Date: 11/3/2017
 Preferred Payment Method: Credit Card

Drop State Registration

Do you want to drop one or more states?
 States to Drop Registration: ME
 Created By: [Bill Advisor](#) 11/3/2017 12:37 PM Last Modified By: [Bill Advisor](#) 11/3/2017 12:38 PM

[Edit] [Delete]

Notes & Attachments [New Note] [Upload Files]

No records to display

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)	11/3/2017 12:38 PM	Pending	Registrations	Registrations		Pending
Approval Request Submitted	11/3/2017 12:38 PM	Submitted	Bill Advisor	Bill Advisor		

If you have any questions, please email support@leadersgroup.net.

