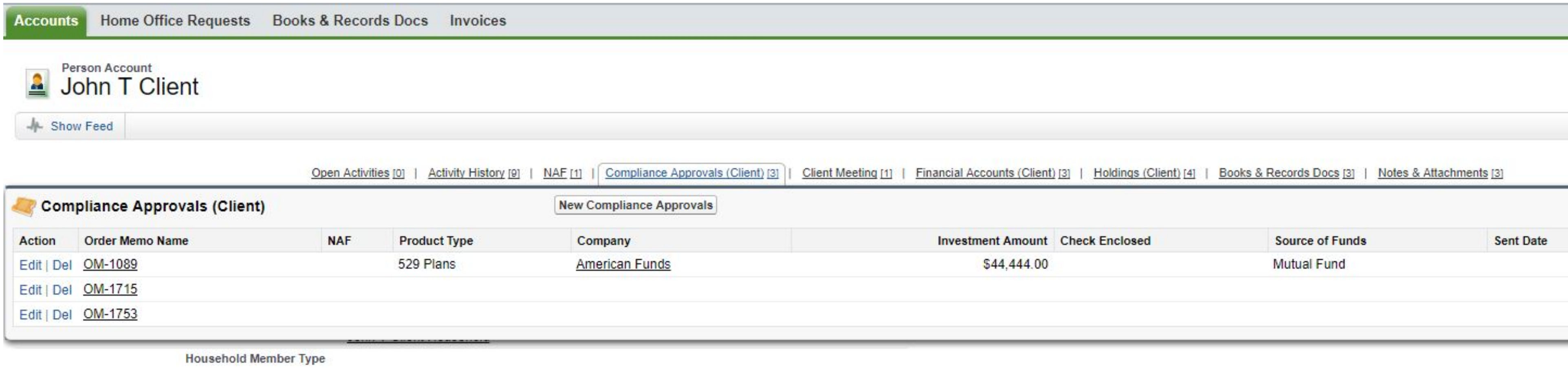
Updating Person Account Clients in LeadersLink

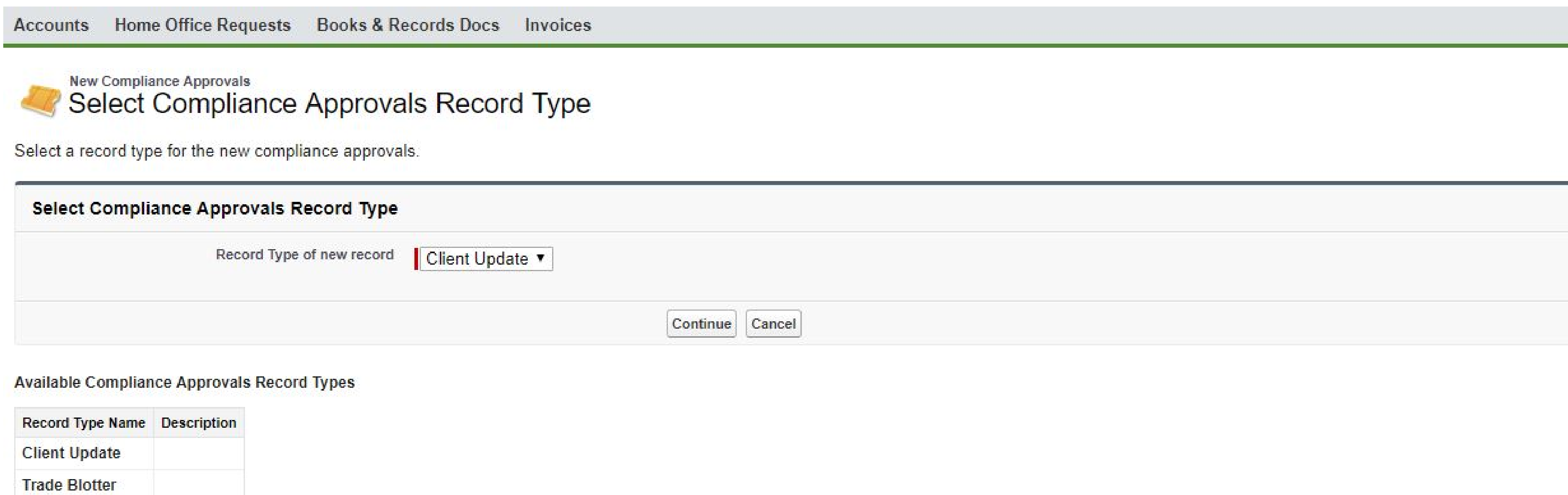
The purpose of the "Client Update" is for anyone to log into LeadersLink, view a client, and make a change to that data. Any change to a "Person Account" can be made via the "Client Update". While this process won't instantaneously update your client's information, it will notify the Accounts Management team of the information that should be updated, and it will be updated within a timely manner.

If for any reason, there is an update that needs to happen right away, please complete this process then email the Accounts Management team at accounts@leadersgroup.net and they can make it a priority.

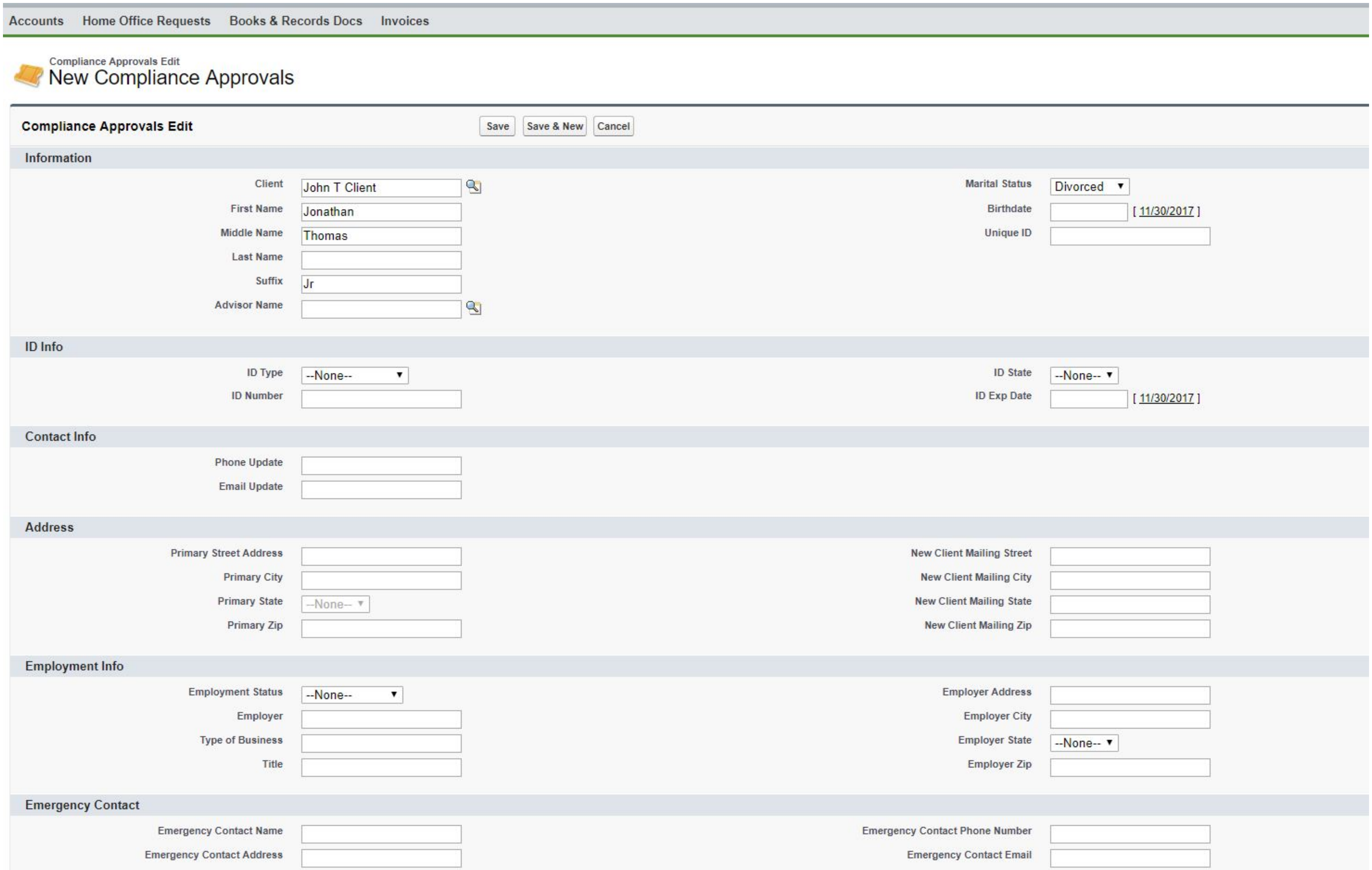
- To start, from the “Person Account”, select “New Compliance Approval”.



- Select “Client Update”

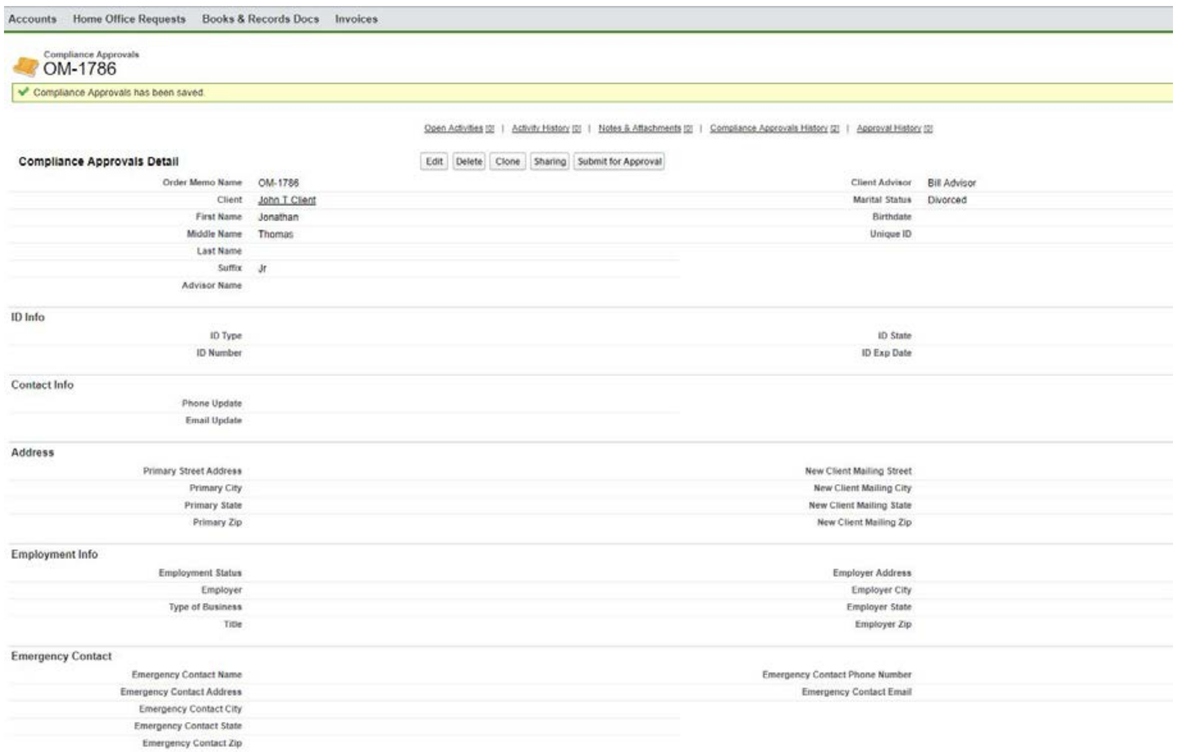


- As you can see, the “Client Update” looks very similar to the layout of the “Person Account”.



- The “Client” field at the top should automatically populate the client record in which you want to update. Please do not change this as it is a reference to which “Person Account” you are updating.
- You only need to fill in the fields that you would like to update. All others you may leave blank.
- Things to remember:
    - For SSN’s, ID Number, and phone, please only type in the number, no punctuation is needed.
    - If you have a split rep that should be on this client, please use the lookup button next to the “Advisor Name” to find it. If you need help with this process, please review the client creating procedures.
- Click the “Save” button at the top or the bottom when done.

- You should see the alert at the top indicating the “Compliance Approval has been saved”



- Click “Submit for Approval”. **<u>If you do not click this, the Accounts Management team will not be made aware that you would like to update a client’s record.</u>**

Family Members with Accounts

Family Members with Accounts

Industry Affiliations

Industry Affiliations		10% shareholder	
Position		Company	
Created By	Bill Advisor, 11/30/2017 3:11 PM	Last Modified By	Bill Advisor, 11/30/2017 3:11 PM

Edit | Delete | Clone | Sharing

Open Activities New Task | New Event

No records to display

Activity History Log a Call | Send an Email

No records to display

Notes & Attachments New Note | Upload Files

No records to display

Compliance Approvals History

Date	User	Connection	Action
11/30/2017 3:12 PM	Bill Advisor		Record locked.
11/30/2017 3:11 PM	Bill Advisor		Changed **Order Memo Name** to **OM-1786**.
			Created.

Approval History Recall Approval Request

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Accounts Management Review (Pending for first approval)						Pending
	11/30/2017 3:12 PM	Pending	Account Management	Account Management		
Approval Request Submitted						
	11/30/2017 3:12 PM	Submitted	Bill Advisor	Bill Advisor		

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Always show me fewer ▲ / ▼ more records per related list

- Once you click this button, our Accounts Management team will update your client record within 2 business days.