

LEADERSlink

Creating a Split Rep Code on LEADERSlink

1. Log in to Leaderslink
2. Navigate to the 'Home Office Requests' tab:

The screenshot displays the LEADERSlink web application interface. At the top, the 'LEADERSlink' logo is prominent on the left, and a search bar is on the right. Below the logo, a navigation bar contains tabs for 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (which is highlighted), 'Compliance Approvals', and 'Books & Records Docs'. On the left side, there is a sidebar with sections: 'LeadersLink Resources' (listing Advizr, RightBridge, Training Videos, Starlight Portfolios, and FINRA Manual), 'Create New...' (with a dropdown arrow), 'Shortcut' (with a 'Calendar' link), 'Recent Items' (listing John Test, BRD-3325, Test Business, Household, Test Household, and Test), and 'Messages and Alerts'. The main content area is titled 'Dashboard' and includes a 'Refresh' button. Below this, there are three data sections: 'Compensation Overview' with a table of financial metrics, 'Compensation Activity' with a table of weekly and quarterly data, and 'Hold/Suspense Report' with a table showing client holds. Below these is a 'My Tasks' section with a 'New' button and a message stating 'You have no open tasks scheduled for this period.' At the bottom is a 'Calendar' section with a 'New Event' button and a message 'You have no events scheduled for the next 7 days.' A calendar widget for October 2017 is visible in the bottom right corner, showing the current date as October 13, 2017.

LeadersLink Bill Advisor

LEADERSlink Search... Search

Home Dashboards Payout Accounts **Home Office Requests** Compliance Approvals Books & Records Docs

LeadersLink Resources

- Advizr
- RightBridge
- Training Videos
- Starlight Portfolios
- FINRA Manual

Create New...

Shortcut

- Calendar

Recent Items

- John Test
- BRD-3325
- Test Business
- Household
- Test Household
- Test

Messages and Alerts

Dashboard Refresh

As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.

Compensation Overview		Compensation Activity		Hold/Suspense Report		
Beginning Balance:	\$0	Current Week (Net):	\$0	Client	Hold Reason	Sum of Commission Payable
Change Since Last Payout:	\$0	Previous Week (Net):	\$0	Total 0.00		
Gross Commission Payable:	\$0	Month-to-Date (Net):	\$0			
Less Amount On Hold:	\$0	Quarter-to-Date (Net):	\$0			
Net Commission Payable:	\$0	Year-to-Date (Net):	\$0			

My Tasks New All Open

You have no open tasks scheduled for this period.

Calendar New Event

Today 10/13/2017

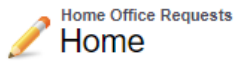
You have no events scheduled for the next 7 days.

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

1 7 31

3. Click 'Create New Home Office Request':



View: [Clone](#) | [Create New View](#)

Home Office Request
CMP-2617
CMP-2571
CMP-0070
CMP-2570
CMP-0060
CMP-0067
CMP-0057
CMP-0068
CMP-0069

4. Select the type "Split Rep Code Creation" of home office request you would like to submit:

Select Home Office Request Record Type

Record Type of new record:

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 TI
Advisor Request to Add / Drop State Registrations	
Split Rep Code Creation	
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.

5. Click 'Continue'

6. On the following screen, complete any information that you have, please keep in mind any field with a red bar next to them are required before moving on:

Home Office Request Edit Save Save & New Cancel


Information

Advisor  Record Type Split Rep Code Creation

Advisors to Be Split

Advisor to Split 1	<input type="text"/>	Advisor 1 Split %	<input type="text"/>
Advisor to Split 3	<input type="text"/>	Advisor 2 Split %	<input type="text"/>
Advisor to Split 2	<input type="text"/>	Advisor 3 Split %	<input type="text"/>
Other Advisors to Split	<input type="text"/>		

Advisor Signature

Advisor Signature 


Commissions Team

New Split Rep Code

Save Save & New Cancel

7. "Advisor to Split 1" should be you, add the percentage you should receive.
8. If you have more than 3 advisors that need to be on the split code, please enter the other reps names and the percentage for them to receive in the "Other Advisors to Split" field.
9. Once all fields are completed, click 'Save'.

10. Once all fields have been completed and reviewed for accuracy, click 'Submit for Approval'

 CIVIL-4967

✓ Home Office Request has been saved.

[« Back to List: Home Office Requests](#)

[Approval History](#) [0]

Home Office Request Detail

[Edit](#) [Submit for Approval](#)

Home Office Request	CMP-4967	Record Type	Split Rep Code Creation [Change]
Advisor	Bill Advisor		

Advisors to Be Split

Advisor to Split 1	Bill Advisor	Advisor 1 Split %	50%
Advisor to Split 3	Joe Advisor	Advisor 2 Split %	50%
Advisor to Split 2		Advisor 3 Split %	
Other Advisors to Split			

Advisor Signature

Advisor Signature  Bill Advisor

Commissions Team

New Split Rep Code

[Edit](#) [Submit for Approval](#)

Approval History

[Submit for Approval](#)


No records to display

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Always show me fewer  /  more records per related list

11.To check on the status of the request, scroll down to the ‘Approval History’ section to view the status of your request:

[Approval History \[2\]](#)


Home Office Request Detail  [Edit](#)

Home Office Request	CMP-4967	Record Type	Split Rep Code Creation [Change]
Advisor	Bill Advisor		


Advisors to Be Split

Advisor to Split 1	Bill Advisor	Advisor 1 Split %	50%
Advisor to Split 3	Joe Advisor	Advisor 2 Split %	50%
Advisor to Split 2		Advisor 3 Split %	
Other Advisors to Split			


Advisor Signature



Advisor Signature  [Bill Advisor](#)

Commissions Team

New Split Rep Code  [Edit](#)

Approval History

Action	Date	Status	Assigned To	Comments	Overall Status
Step: Step 1 (Pending for first approval)					
	3/15/2018 8:44 AM	Pending	Commissions Dept.		 Pending
Approval Request Submitted					
	3/15/2018 8:44 AM	Submitted	Bill Advisor		

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12.Once your request is approved, the new rep code will be in your approval email, and under the Commissions Team section. This will need to be used on the client paperwork whenever the split situation applies.

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