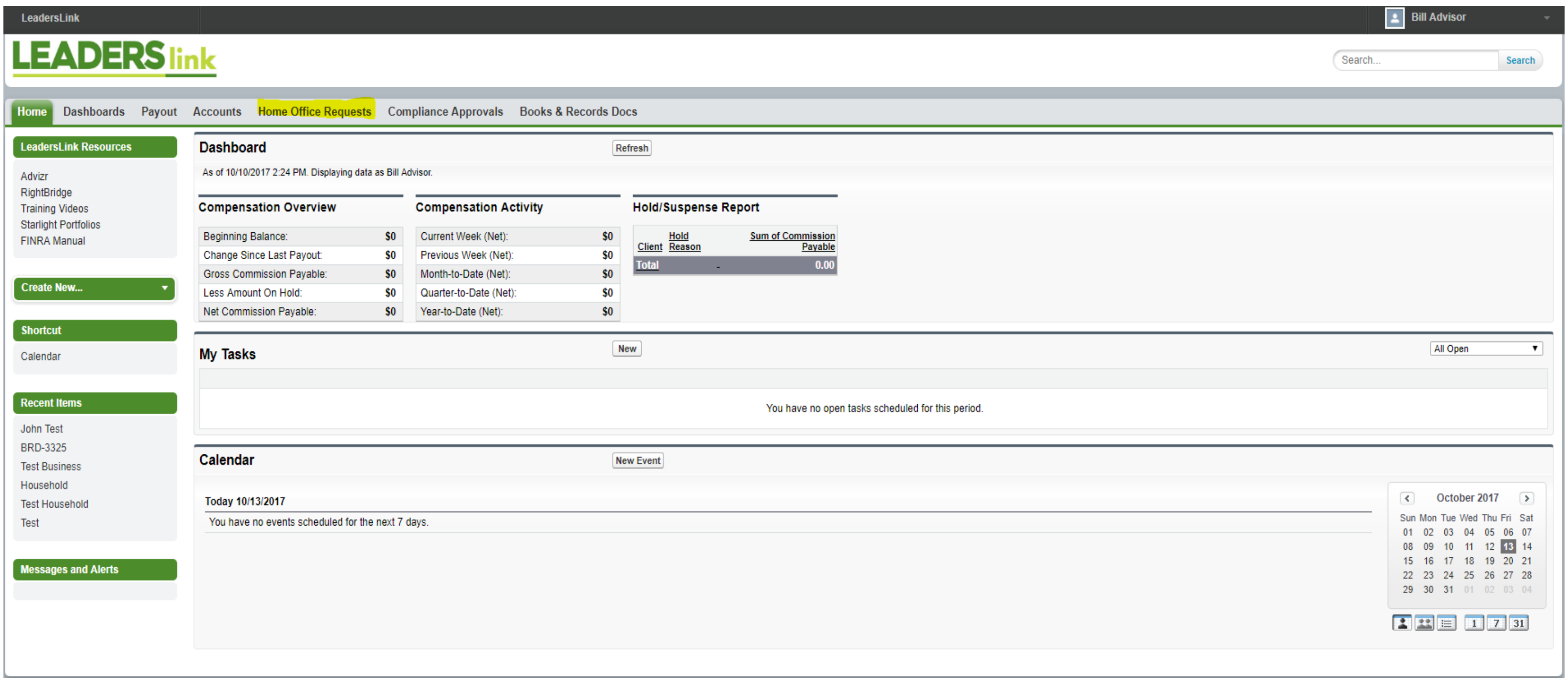
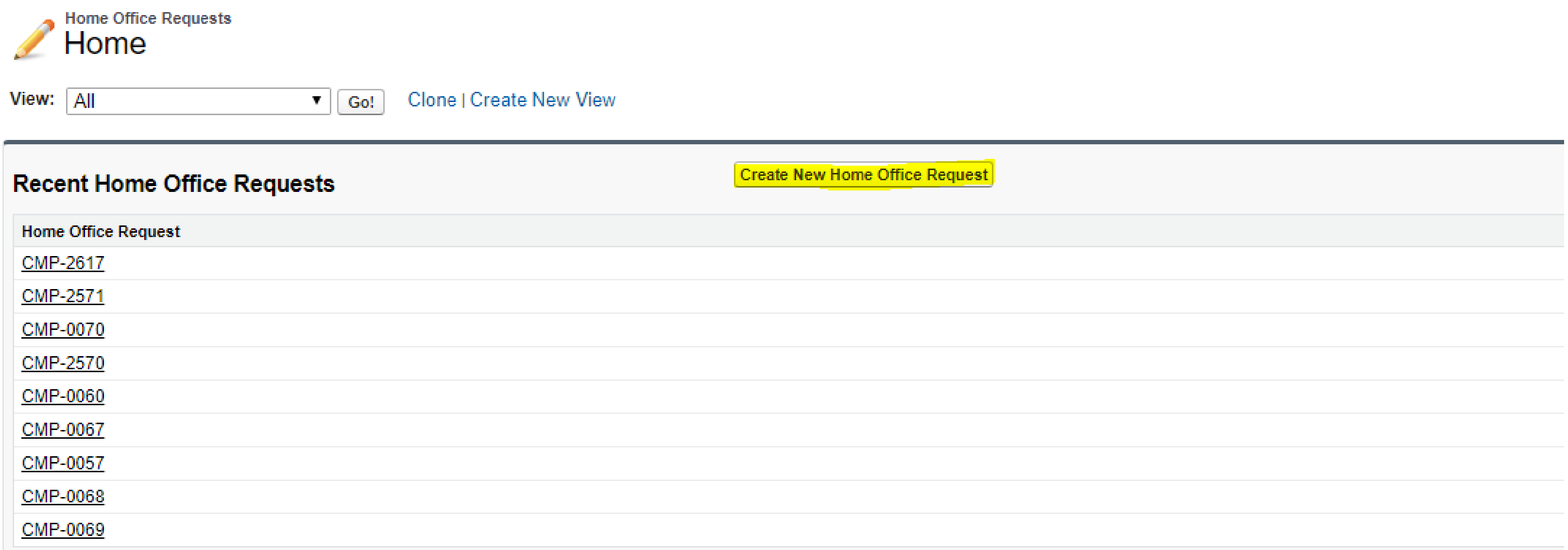
<u>Creating a Split Rep Code on LEADERSlink</u>

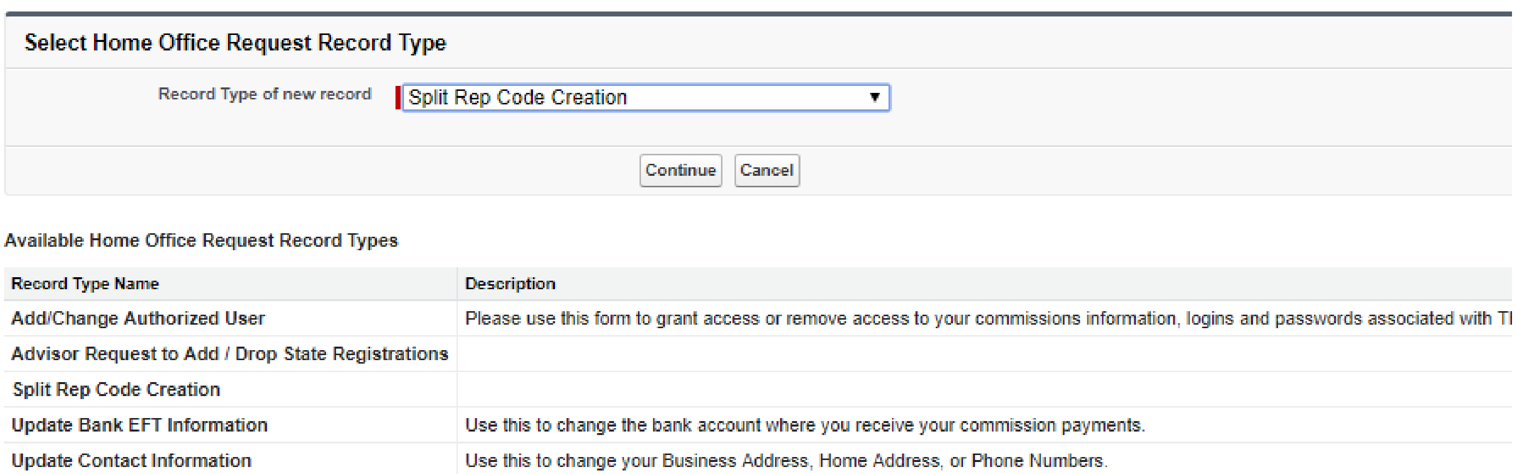
1. Log in to Leaderslink
2. Navigate to the 'Home Office Requests' tab:



3. Click 'Create New Home Office Request':

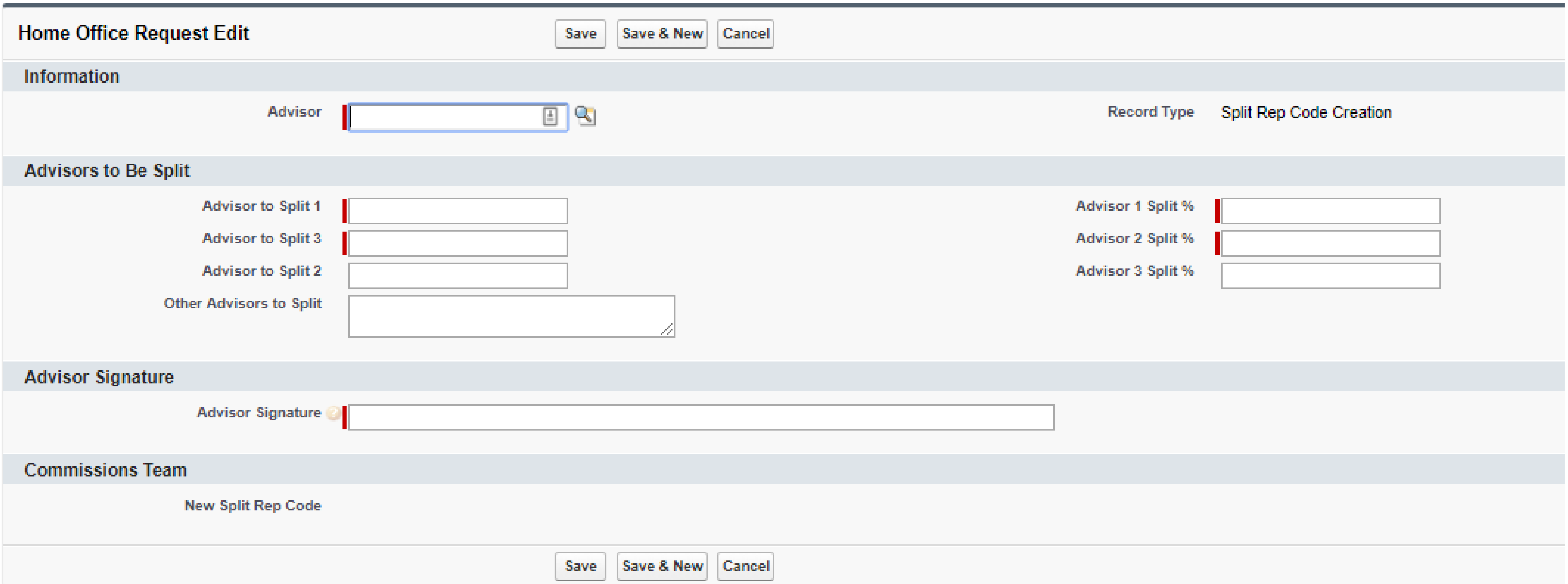


4. Select the type "Split Rep Code Creation" of home office request you would like to submit:



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:

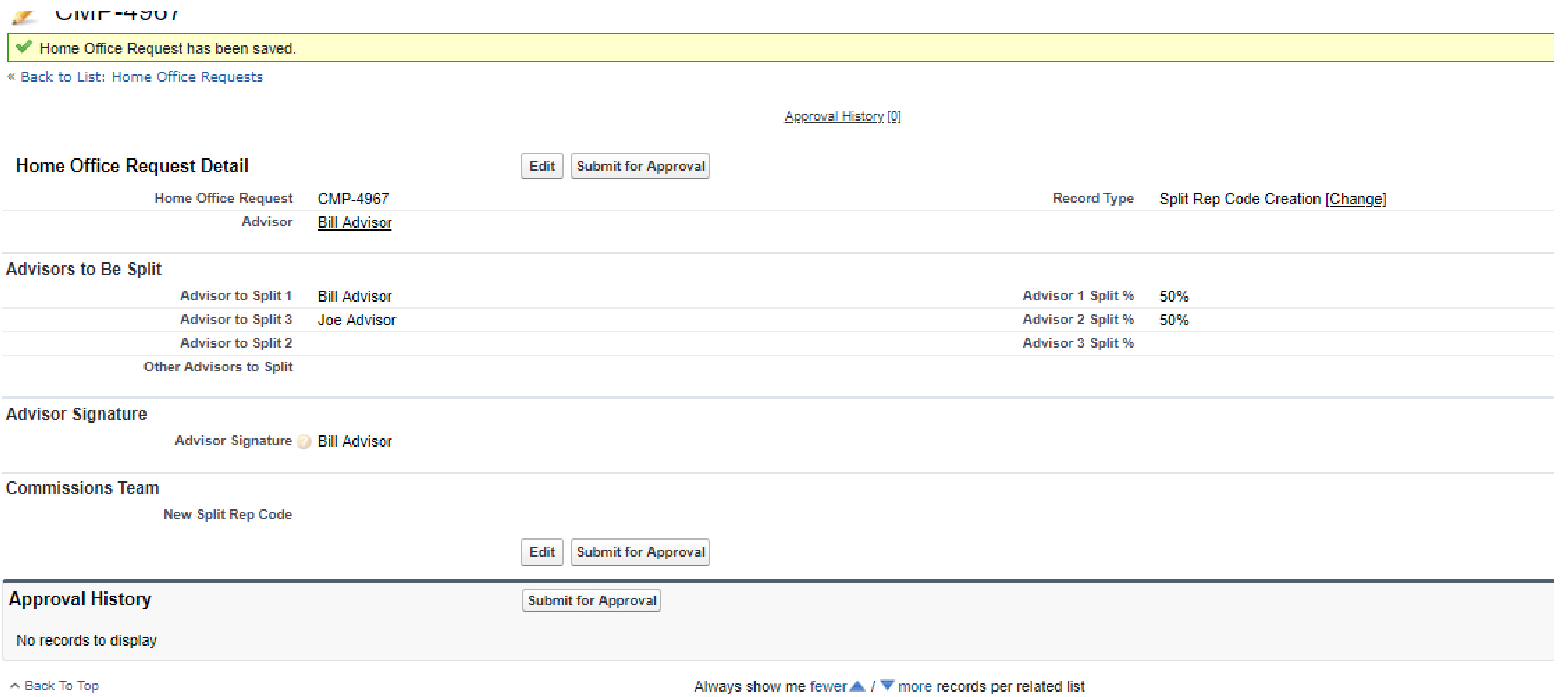


7. "Advisor to Split 1" should be you, add the percentage you should receive.

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’



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)					Pending
	3/15/2018 8:44 AM	Pending	Commissions Dept.		
Approval Request Submitted					
	3/15/2018 8:44 AM	Submitted	Bill Advisor		

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Always show me fewer / more records per related list

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.