

LEADERSlink

Add Change Authorized User

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

The screenshot displays the LEADERSlink dashboard interface. At the top, the user is logged in as 'Bill Advisor'. The navigation menu includes 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (highlighted), 'Compliance Approvals', and 'Books & Records Docs'. The dashboard content is divided into several sections:

- LeadersLink Resources:** A sidebar menu with links to Advizr, RightBridge, Training Videos, Starlight Portfolios, and FINRA Manual.
- Dashboard:** A central area with a 'Refresh' button and a timestamp 'As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.' It contains three sub-sections:
 - Compensation Overview:** A table showing financial data for compensation.
 - Compensation Activity:** A table showing weekly and monthly compensation activity.
 - Hold/Suspense Report:** A table showing holds and suspension reasons.
- 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.'

At the bottom right, there is a calendar widget for October 2017, showing the current date as the 13th. Below the calendar are several small icons for user management and navigation.

3. Click 'Create New Home Office Request':


 Home Office Requests
Home

View: [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

4. Select the type "Add/Change Authorized User" of home office request you would like to submit:

 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:

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.


5. Click 'continue'

6. The following will appear on your screen, complete the necessary fields. Please keep in mind any fields marked with red bar are required and must be completed in order to proceed to the next step.

 Home Office Request Edit
New Home Office Request

Home Office Request Edit Save Save & New Cancel

Information ! = Required Information

Advisor 

Record Type Add/Change Authorized User
Submission Status Open

Access Granted/Removed For (one person per form)

Action Requested

Replace existing authorized user?

First Name

Last Name

Email Address

Can They Contact Us About Compensation?

Create LeadersLink Login For Them?

Access Authorization

Certification I verify that I am the advisor entered on this form. I am granting or removing access to my compensation, clients, and all other information available to me on LeadersLink as detailed above to/from the individual specified. I am aware that if I am adding a second authorized user to my account that I may be charged \$400 on an annual basis for the additional access.

Advisor Signature

Notes

Description

Save Save & New Cancel

7. You can either have a log in created for this person or not. You can also grant them access to your compensation information or you can give them access only to your client records, without compensation details.
8. Once the fields are completed, click 'save'

9. Click 'Submit for Approval'

✔ Home Office Request has been saved.

◀ Back to List: Home Office Requests

[Notes & Attachments](#) (0) | [Approval History](#) (0)

Home Office Request Detail

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

Home Office Request CMP-5227
Advisor [Bill Advisor](#)

Record Type Add/Change Authorized User [\[Change\]](#)
Submission Status Open

Access Granted/Removed For (one person per form)

Action Requested Add a new authorized user
Replace existing authorized user? No

First Name Joe
Last Name Advisor

Can They Contact Us About Compensation? No

Email Address joe@joe.com

Create LeadersLink Login For Them? Create Login, No Compensation Access

Access Authorization

Certification I verify that I am the advisor entered on this form. I am granting or removing access to my compensation, clients, and all other information available to me on LeadersLink as detailed above to/from the individual specified. I am aware that if I am adding a second authorized user to my account that I may be charged \$400 on an annual basis for the additional access.

Advisor Signature Bill Advisor

Notes

Description

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

Notes & Attachments

[New Note](#) [Attach File](#)

No records to display

Approval History

[Submit for Approval](#)

No records to display

10.To check on the status of the request, scroll down to the ‘Approval History’ area to see where the request is at:

Notes & Attachments (2) | Approval History (2)

Home Office Request Detail Edit

Home Office Request	CMP-5227	Record Type	Add/Change Authorized User [Change]
Advisor	Bill Advisor	Submission Status	Submitted

Access Granted/Removed For (one person per form)

Action Requested	Add a new authorized user		
Replace existing authorized user?	<input type="radio"/> No		
First Name	Joe	Can They Contact Us About Compensation?	<input type="radio"/> No
Last Name	Advisor		
Email Address	joe@joe.com	Create LeadersLink Login For Them?	<input type="radio"/> Create Login, No Compensation Access

Access Authorization

Certification I verify that I am the advisor entered on this form. I am granting or removing access to my compensation, clients, and all other information available to me on LeadersLink as detailed above to/from the individual specified. I am aware that if I am adding a second authorized user to my account that I may be charged \$400 on an annual basis for the additional access.

Advisor Signature Bill Advisor

Notes

Description

Edit

Notes & Attachments

No records to display

Approval History

Action	Date	Status	Assigned To	Comments	Overall Status
Step: Step 1 (Pending for first approval)					
	5/21/2018 9:21 AM	Pending	Sys Admins		Pending
Approval Request Submitted					
	5/21/2018 9:21 AM	Submitted	Bill Advisor		

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