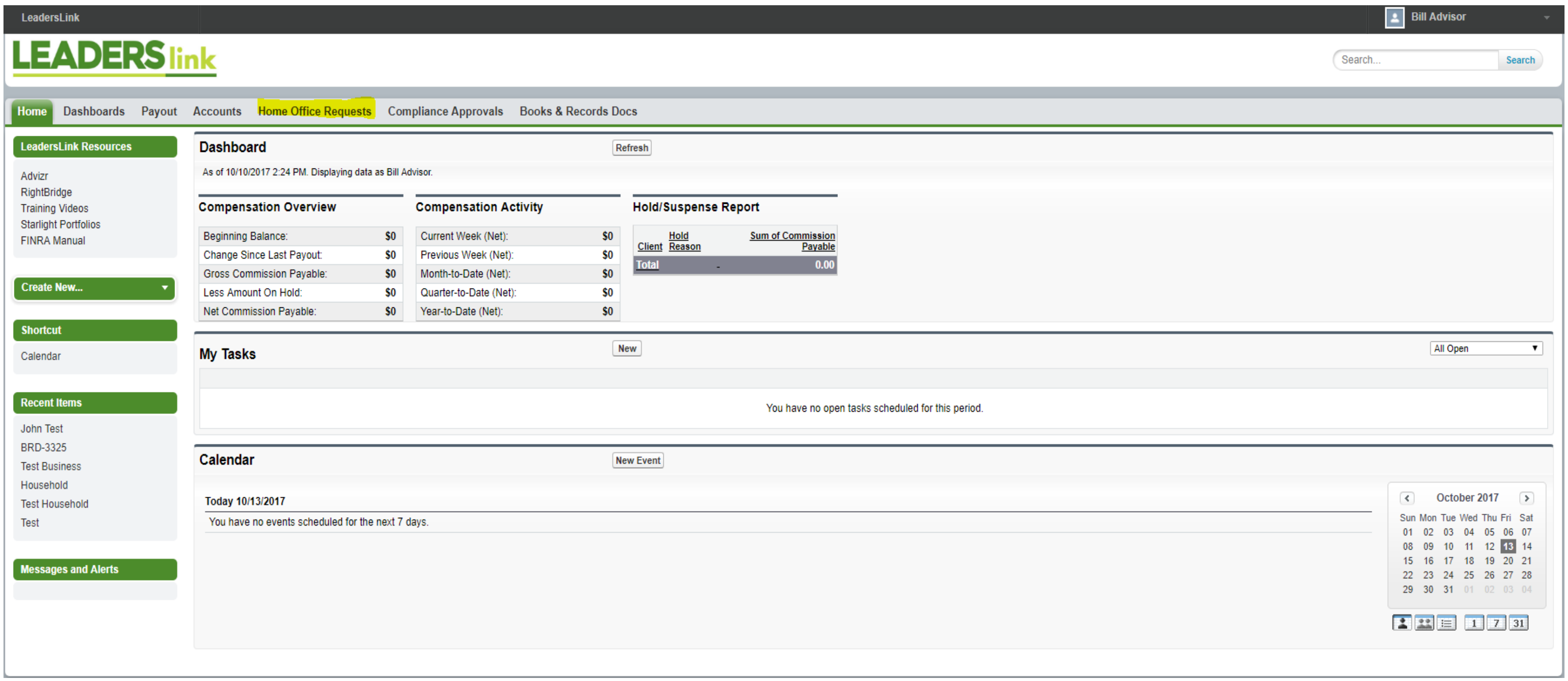
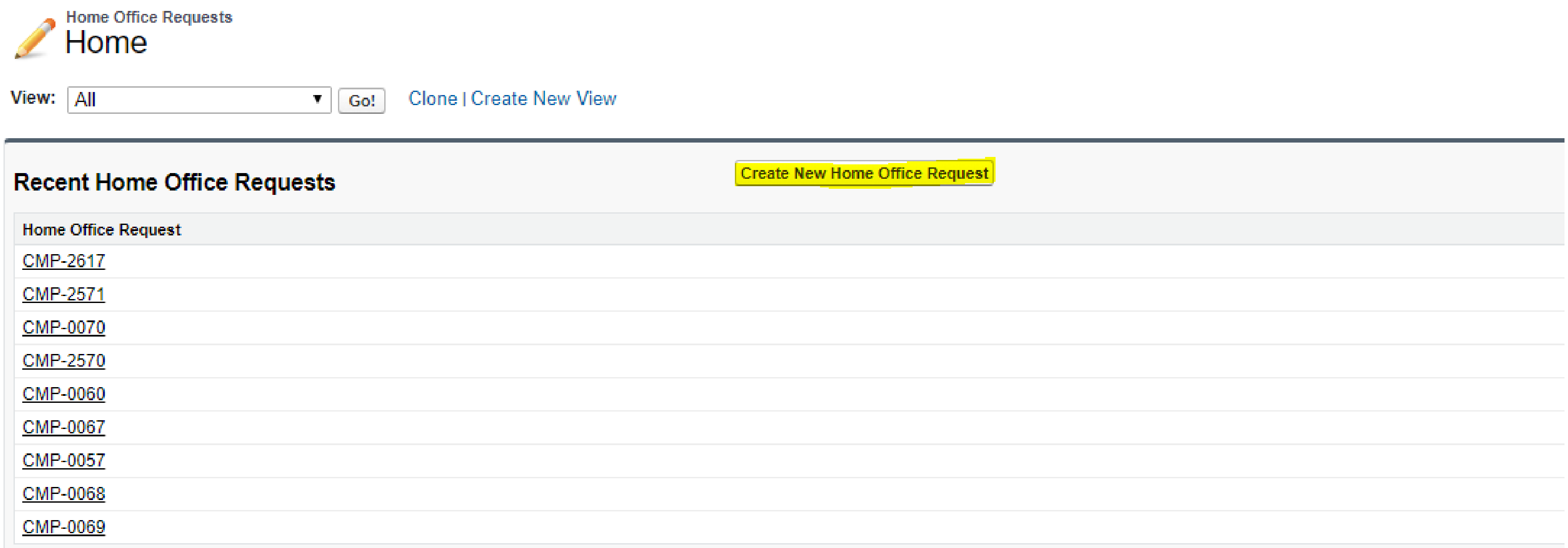
Add Change Authorized User

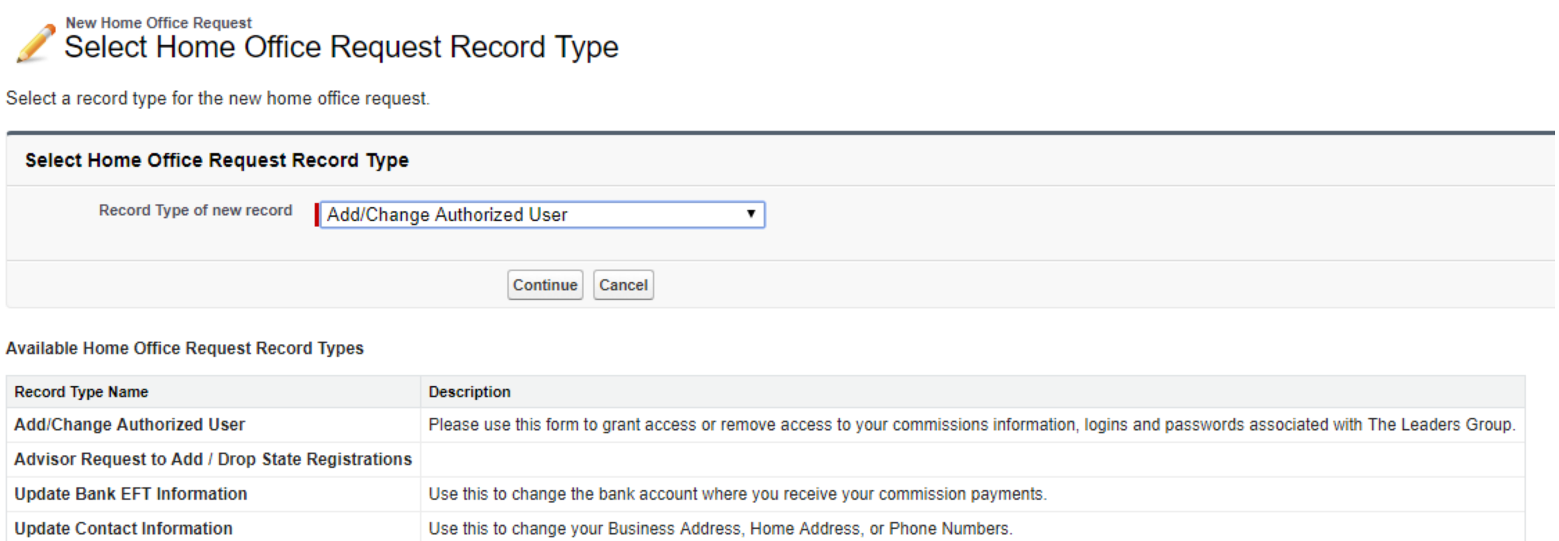
1. Log in to LEADERSlink
2. Navigate to the 'Home Office Requests' tab:



3. Click ‘Create New Home Office Request’:

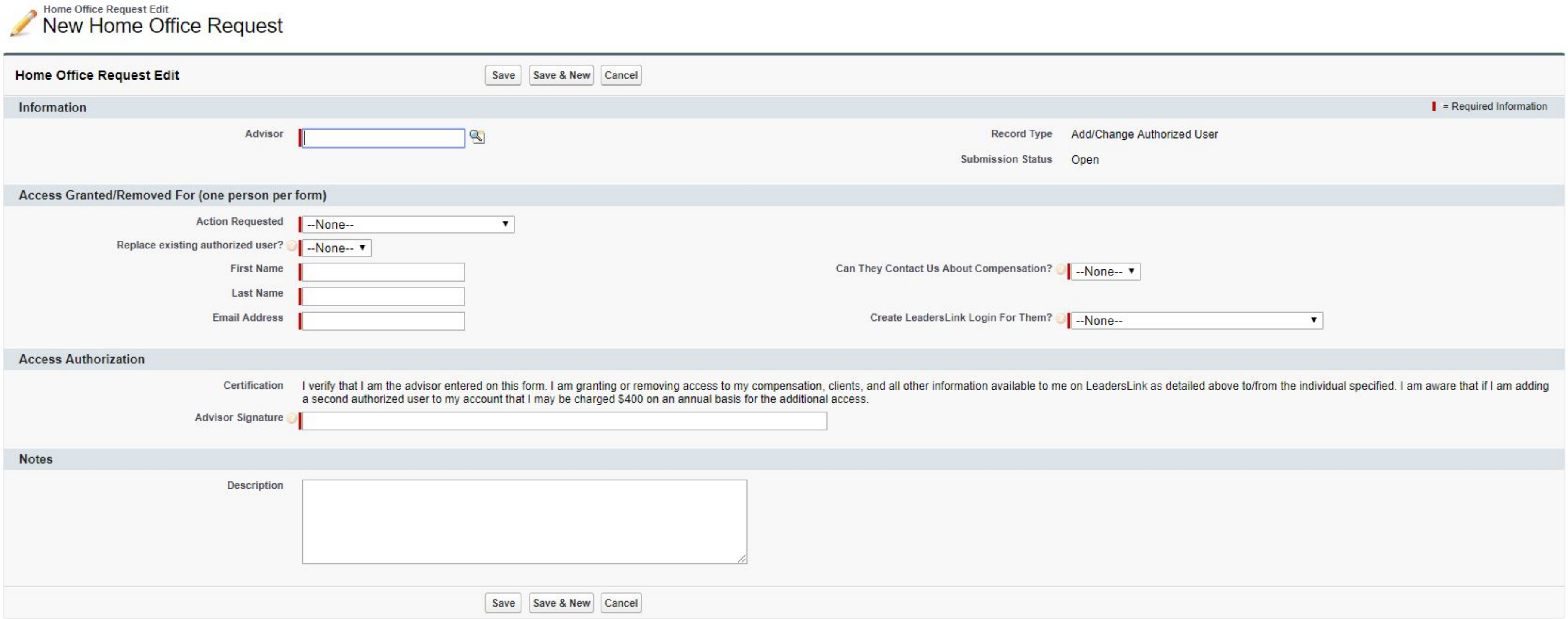


4. Select the type “Add/Change Authorized User” of home office request you would like to submit:



5. Click ‘continue’

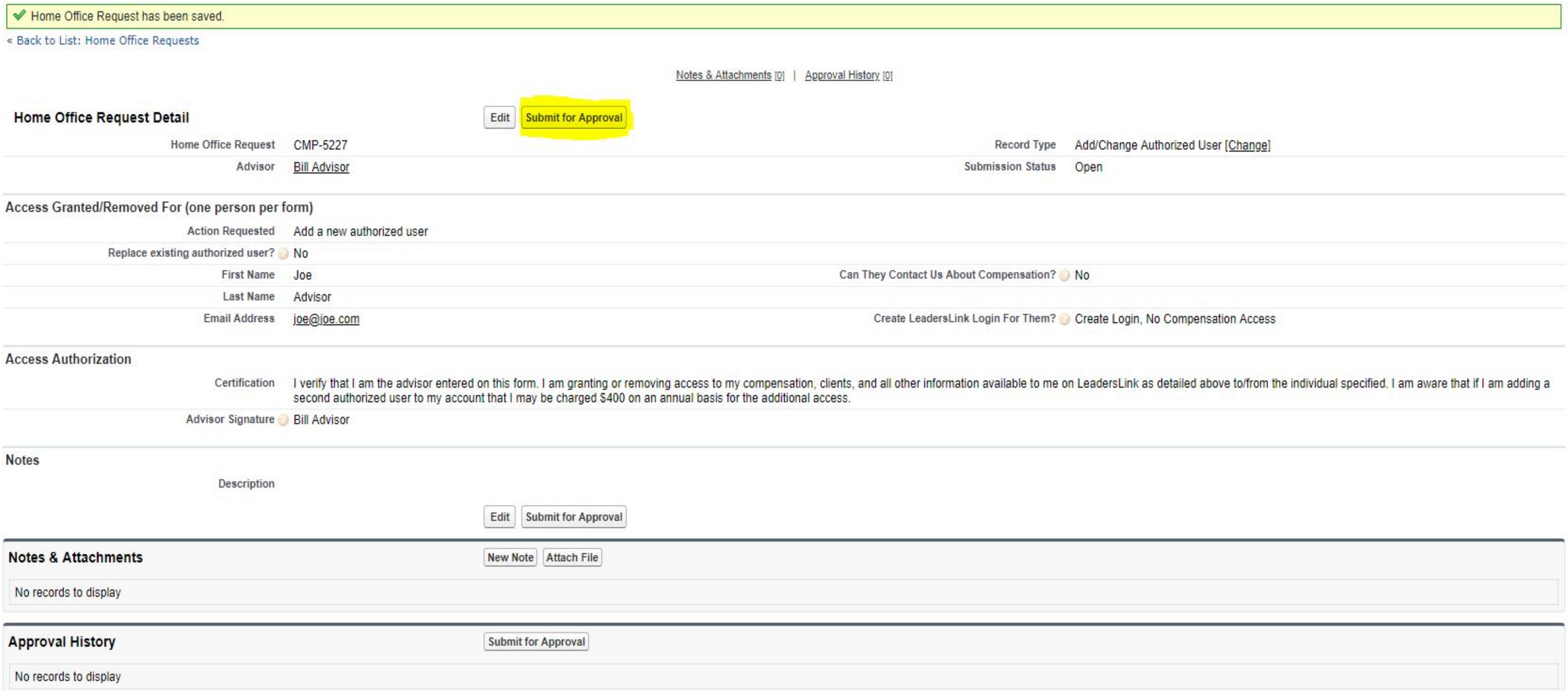
6. The following will appear on your screen, complete the necessary fields. Please keep in mind any fields marked with red bar are required and must be completed in order to proceed to the next step.



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	Record Type	Add/Change Authorized User [Change]
Advisor	Bill Advisor	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	Can They Contact Us About Compensation?	No
Last Name	Advisor		
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

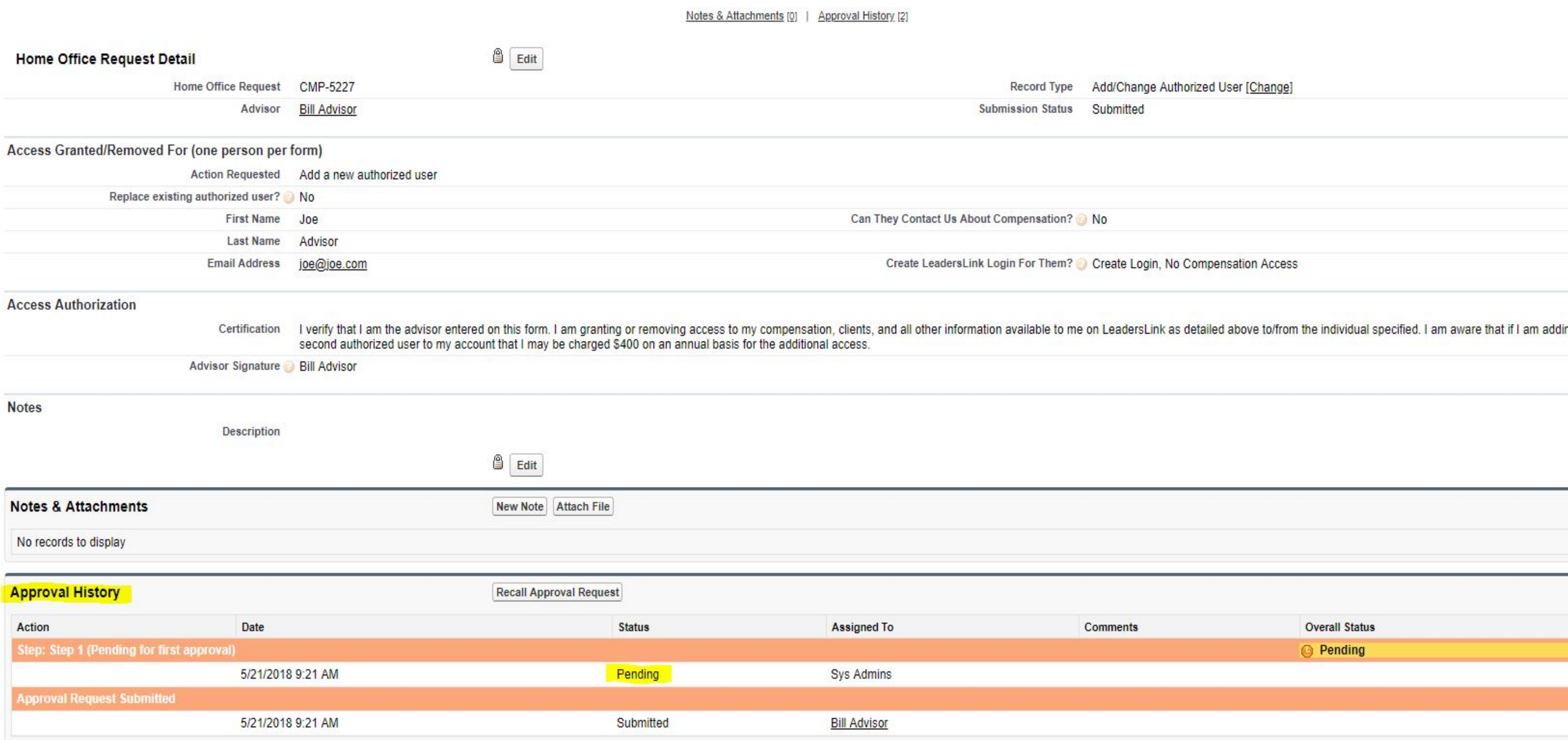
Notes & Attachments New Note | Attach File

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 [0] | 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?	No		
First Name	Joe	Can They Contact Us About Compensation?	No
Last Name	Advisor		
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 addi 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 New Note Attach File

No records to display

Approval History Recall Approval Request

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

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