

LEADERSlink

Home Office Requests: How to Submit a Suggested Change through LEADERSlink

Leaders Group representatives can use this home office request to suggest changes and improvements for the entire suite of LEADERSlink software.

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

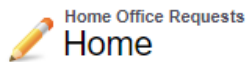
The screenshot displays the LEADERSlink dashboard interface. At the top, the 'LEADERSlink' logo is visible on the left, and a search bar is on the right. The navigation menu includes 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (highlighted in yellow), 'Compliance Approvals', and 'Books & Records Docs'. The left sidebar contains sections for 'LeadersLink Resources' (with links to Advizr, RighttBridge, Training Videos, Starlight Portfolios, and FINRA Manual), 'Create New...', 'Shortcut' (with a link to Calendar), 'Recent Items' (with links to John Test, BRD-3325, Test Business, Household, Test Household, and Test), and 'Messages and Alerts'. The main content area is titled 'Dashboard' and shows data for 'Bill Advisor' as of 10/10/2017 2:24 PM. It is divided into three sections: 'Compensation Overview', 'Compensation Activity', and 'Hold/Suspense Report'. The 'Compensation Overview' table shows various balance and payable amounts, all at \$0. The 'Compensation Activity' table shows weekly and monthly net amounts, also at \$0. The 'Hold/Suspense Report' table shows a total commission payable of 0.00. Below these are sections for 'My Tasks' (with a 'New' button and a message that there are no open tasks) and 'Calendar' (with a 'New Event' button and a message that there are no events scheduled for the next 7 days). A calendar widget for October 2017 is visible in the bottom right corner.

Compensation Overview	
Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0

Compensation Activity	
Current Week (Net):	\$0
Previous Week (Net):	\$0
Month-to-Date (Net):	\$0
Quarter-to-Date (Net):	\$0
Year-to-Date (Net):	\$0

Hold/Suspense Report		
Client	Hold Reason	Sum of Commission Payable
Total		
		0.00

3. Once on the 'Home Office Requests' tab, click 'Create New Home Office Request':



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. After the 'Create New Home Office Request' button is clicked, select the type "LeadersLink Suggestion":

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	
LeadersLink Suggestion	Any suggestions for changes or improvements to the LeadersLink technology package.
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. Once one is chosen, click 'continue'

6. On the following screen that shows up, enter “Advisor” as yourself.
7. “Area for suggestion”, is where in the LEADERSlink Technology you would like to see something new, and explain the idea in the “Suggestion Description” field. Please be as descriptive as possible

 Home Office Request Edit
New Home Office Request

Home Office Request Edit Save Save & New Cancel

Information

Advisor  Record Type LeadersLink Suggestion

LeadersLink Suggestion

Area for Suggestion

Suggestion Description

Save Save & New Cancel

8. Once the fields are filled out, click ‘save’

9. Once all the information is filled out completely and correctly, click 'Submit for Approval'

Home Office Request
CMP-5007

✓ Home Office Request has been saved.

« Back to List: Home Office Requests

Approval History [0]

Home Office Request Detail

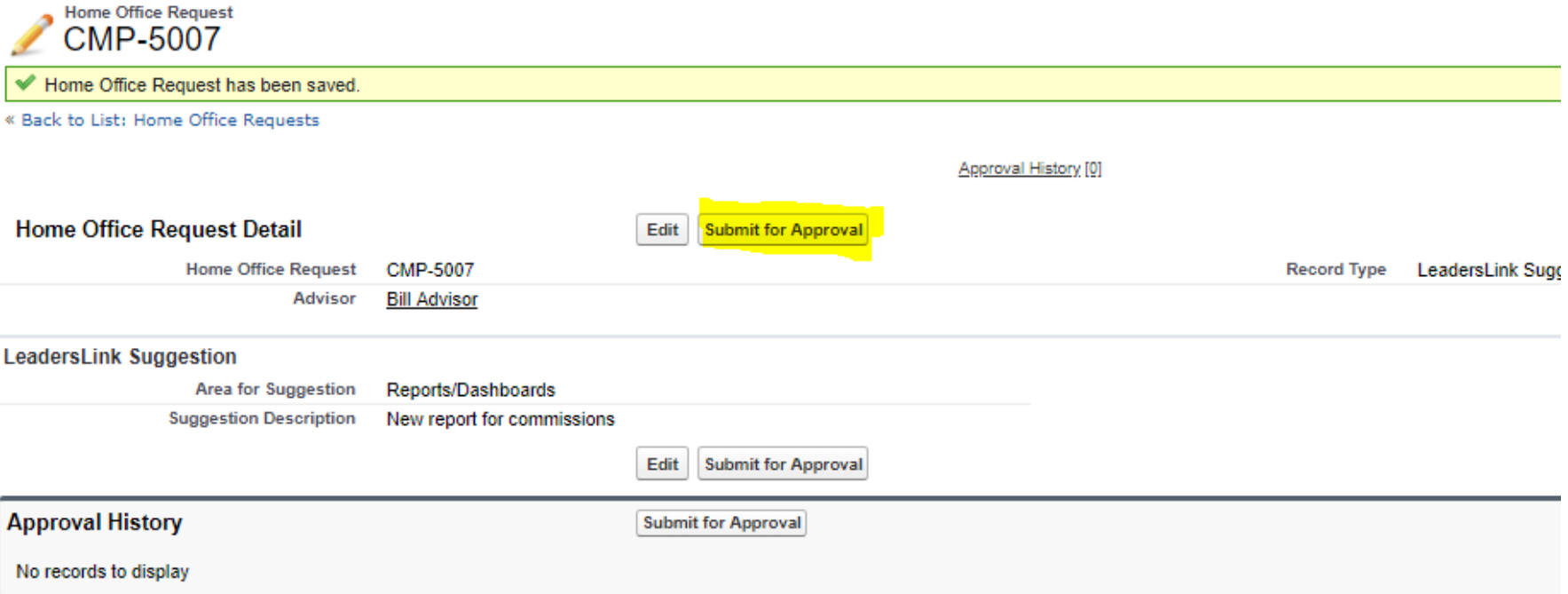
Home Office Request CMP-5007 Record Type LeadersLink Sugg
Advisor Bill Advisor

LeadersLink Suggestion

Area for Suggestion Reports/Dashboards
Suggestion Description New report for commissions

Approval History

No records to display



10. Once submitted this will give you an email confirmation, but there's not an actual approval process. This will be submitted to our management team for review and will be prioritized for potential implementation.

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