

LEADERS link

How to Navigate the Advisor Compensation Dashboard

SUMMARIZED DASHBOARD VIEW

Login to Leaderslink (using your archived email address)

If you don't have a login or you have questions about logging in reach out to support@leadersgroup.net

Upon logging in, Leaderslink opens to your 'Home' screen. The 'Home' screen gives a brief overview of the 'Advisor Compensation Dashboard'.

Please Note It is vital you hit the 'Refresh' button located near the top of the page each time upon logging into Leaderslink.

LeadersLink

LEADERS link

Search

Logged in as Bill Advisor (support@leadersgroup.net)

Home Dashboards Payout Accounts Home Office Requests Books & Records Docs Invoices

Leaderslink Resources

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

Create New...

Shortcut

- Calendar

Recent Items

- CMP-4906
- John T Client
- BRD-3924
- BRD-3786
- Bill O Advisor
- Bill Advisor
- CMP-4578
- CMP-4577
- CMP-4295
- CMP-2570

Messages and Alerts

Dashboard Refresh

As of 11/9/2017 8:20 PM. Displaying data as Bill Advisor.

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

My Tasks New All Open

You have no open tasks scheduled for this period.

Calendar New Event

Today 11/17/2017

You have no events scheduled for the next 7 days.

November 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	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	

1 2 31

COMPENSATION OVERVIEW

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

- Beginning Balance:** Your balance since the last payout cycle.
- Change Since Last Payout:** New compensation activity since the last payout cycle.
- Gross Commission Payable:** This is the 'Beginning Balance' + 'Change since last payout'
- Less Amount on Hold:** Compensation amount on hold/suspense, this can be clicked on to go directly to your 'Advisor Hold Detail' report.
- Net Commission Payable:** 'Gross Commission Payable' – 'Less Amount on Hold'. This is the amount pending to be paid out to you on the upcoming payout cycle.

COMPENSATION ACTIVITY

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

This is a dynamic component which displays your 'Compensation Activity' payable to you for specific time frames:

- Current Week
- Previous Week
- Month-to-Date
- Quarter-to-Date
- Year-to- Date time

You can click on any one of these links to go directly to your detailed 'Commission Activity' report for that particular timeframe. (See below)

Commission Activity | WTD - Dashboard

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: Post Date Show: All advisor ledger Time Frame: Date Field: Post Date Range: This Week From: 11/12/2017 To: 11/16/2017

Run Report Hide Details Printable View Export Details

Filtered By: Record Type Text equals Commission Transactions AND Commission Hold equals No AND Commission Payable not equal to 0

Grouped By: Post Date Advisor: Account Name Security Type Sorted By: Post Date Advisor: Account Name Security Type

Client	Financial Account #	Carrier/Fund Company	Trade Date	Tran Type	Premium/Investment Amount	GDC (Production)	Rate	Commission Payable	Click for Detail
Grand Totals (0 records)									
								\$0.00	

HOLD/SUSPENSE REPORT

Client	Hold Reason	Sum of Commission Payable
Total	-	0.00

The Hold/Suspense component displays any accounts currently on a hold/suspense. It allows you to easily view the Client/Account name, the reason it's on hold, and the Commission Payable for each account.

You can click anywhere on this component to go directly to your 'Advisor Hold Detail' report.

(See below)

Advisor Hold Detail - Dashboard

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: Advisor: Account Name Show: All financial accounts Time Frame: Date Field: Created Date Range: Custom From: To:

Run Report Hide Details Printable View Export Details

Filtered By: Commission Hold equals Yes AND Commission Payable not equal to 0 AND Override equals False AND Hold Reason equals Account Paperwork Missing,Wholesale New Account Form Missing AND Line of Business equals Investments

Grouped By: Advisor: Account Name Client Hold Reason Sorted By: Advisor: Account Name Client Hold Reason

Financial Account Number	Payor	Security Type	Trade Date	Tran Type	Commission Payable	Hold Effective Date	Days on Hold
Grand Totals (0 records)							
					\$0.00		

FULL COMPENSATION DASHBOARD INFORMATION

For a more comprehensive look at your commissions than you see on your home screen, please click the 'Dashboards' tab on the top of the screen to access the full Compensation Dashboard, as highlighted below.

LeadersLink

LEADERSlink

Home **Dashboards** Payout Accounts Home Office Requests Books & Records Docs Invoices

LeadersLink Resources

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

Create New...

Shortcut

- Calendar

Dashboard

Refresh

As of 11/20/2017 12:47 PM. Displaying data as Bill Advisor.

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

My Tasks

New

The Compensation Dashboard offers additional details and insights into your commissions including:

- Charted breakdowns of weekly & monthly compensation earned – indicating numbers for Net Commission Payable & Gross Production
- Week-by-week breakdown of payments deposited to your account
- Detailed reports regarding Expenses/Fees & any Adjustments made to your account
- Yearly summation of Gross Dealer Concession.

All charts and reports are fully interactive, meaning you may click into any one of them for additional details.

Any additional commission related details, namely your weekly commission statements, are found within the Payout tab.

Refresh
As of Today at 7:29 AM

Commission Overview | Leaders Group

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

Commissions are released when a minimum of \$50 for direct deposit is accrued.

Commission Activity (Net)

This Week:	\$0
Last Week:	\$0
This Month:	\$0
Quarter-to-Date:	\$0
Year-to-Date:	\$0

Hold/Suspense Report

Client	Hold Reason	Sum of Commission Payable
Total		0.00

Production/GDC

2018:	\$0
2017:	\$0

Payments

Post Date	Year-to-Date	Sum of Deposit Amount
Total		0.00

Commissions are released when a minimum of \$50 for direct deposit is accrued.

Adjustments

2018:	\$0
2017:	\$0

Weekly Compensation Activity

The report returned no results.

Please reference the 'Payout' tab for additional weekly statements.

Product Mix

The report returned no results.

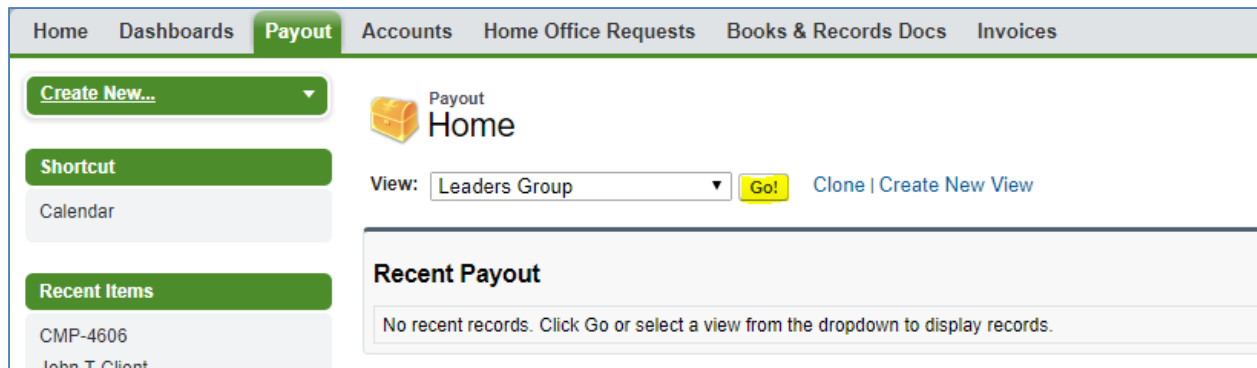
Sum of GDC (Production)

Expenses/Fees

2018:	\$0
2017:	\$0

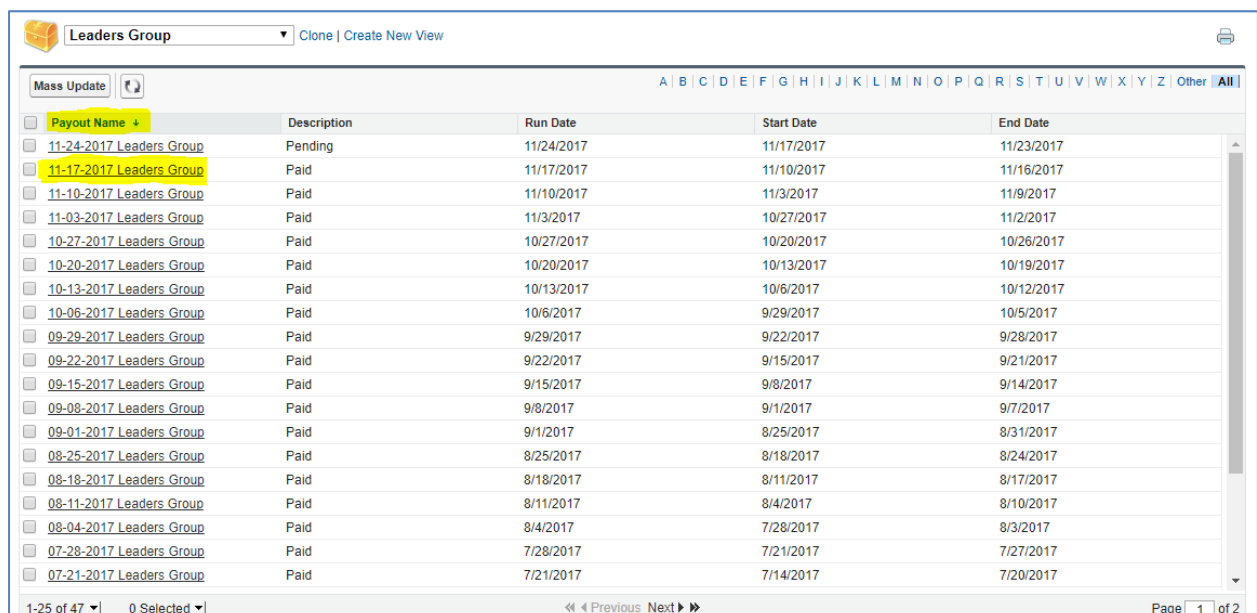
WEEKLY COMMISSION STATEMENTS

If you're trying to find your weekly commission statements, please click the Payout tab. In order to find details for a specific week, please click the "Go!" button located next to the "Leaders Group" view.



Once you click 'Go!' a list of payout runs will become available. You may need to sort by 'Payout Name' to find the most recent week. Please select the date of the week you wish to view (i.e: 11-17-2017 Leaders Group).

****Please Note**** Payout runs with the Description 'Pending' are still being processed. Commission information for that week is available & up-to-the-minute, however it may not be fully complete until the commission run is processed.



<input type="checkbox"/>	Payout Name	Description	Run Date	Start Date	End Date
<input type="checkbox"/>	11-24-2017 Leaders Group	Pending	11/24/2017	11/17/2017	11/23/2017
<input type="checkbox"/>	11-17-2017 Leaders Group	Paid	11/17/2017	11/10/2017	11/16/2017
<input type="checkbox"/>	11-10-2017 Leaders Group	Paid	11/10/2017	11/3/2017	11/9/2017
<input type="checkbox"/>	11-03-2017 Leaders Group	Paid	11/3/2017	10/27/2017	11/2/2017
<input type="checkbox"/>	10-27-2017 Leaders Group	Paid	10/27/2017	10/20/2017	10/26/2017
<input type="checkbox"/>	10-20-2017 Leaders Group	Paid	10/20/2017	10/13/2017	10/19/2017
<input type="checkbox"/>	10-13-2017 Leaders Group	Paid	10/13/2017	10/6/2017	10/12/2017
<input type="checkbox"/>	10-06-2017 Leaders Group	Paid	10/6/2017	9/29/2017	10/5/2017
<input type="checkbox"/>	09-29-2017 Leaders Group	Paid	9/29/2017	9/22/2017	9/28/2017
<input type="checkbox"/>	09-22-2017 Leaders Group	Paid	9/22/2017	9/15/2017	9/21/2017
<input type="checkbox"/>	09-15-2017 Leaders Group	Paid	9/15/2017	9/8/2017	9/14/2017
<input type="checkbox"/>	09-08-2017 Leaders Group	Paid	9/8/2017	9/1/2017	9/7/2017
<input type="checkbox"/>	09-01-2017 Leaders Group	Paid	9/1/2017	8/25/2017	8/31/2017
<input type="checkbox"/>	08-25-2017 Leaders Group	Paid	8/25/2017	8/18/2017	8/24/2017
<input type="checkbox"/>	08-18-2017 Leaders Group	Paid	8/18/2017	8/11/2017	8/17/2017
<input type="checkbox"/>	08-11-2017 Leaders Group	Paid	8/11/2017	8/4/2017	8/10/2017
<input type="checkbox"/>	08-04-2017 Leaders Group	Paid	8/4/2017	7/28/2017	8/3/2017
<input type="checkbox"/>	07-28-2017 Leaders Group	Paid	7/28/2017	7/21/2017	7/27/2017
<input type="checkbox"/>	07-21-2017 Leaders Group	Paid	7/21/2017	7/14/2017	7/20/2017

Once you have selected the payout run you wish to view, please click the 'Compensation Detail' button.

Payout
11-17-2017 Leaders Group
 « Back to List: Payout

Payout Detail **Compensation Detail** Payout Detail by Advisor Holds Released

Payout Name	11-17-2017 Leaders Group	Start Date	11/10/2017
Status	Processed	End Date	11/16/2017
Description	Paid	Run Date	11/17/2017

Compensation Detail Payout Detail by Advisor Holds Released

This will bring up the 'Compensation Detail' report, which provides you with a comprehensive commission statement for that week. Details include commissions earned, overrides earned, and any commissions that were previously held that were released to you for that week.

Compensation Detail

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: Advisor: Account Name Show: All advisor ledger

Time Frame: Date Field: Post Date Range: Custom From: To:

Run Report Hide Details Printable View Export Details

Filtered By:(((1 AND 4 AND 5 AND 6) OR (4 AND 2 AND 3)))

1. Payout Run equals 11-17-2017 Leaders Group
2. Hold Release Date greater or equal 11/10/2017
3. Hold Release Date less or equal 11/16/2017
4. Commission Payable not equal to 0
5. Hold Transaction equals False
6. Record Type Text not equal to Payment

Grouped By: Advisor: Account Name Security Type Carrier/Fund Company

Sorted By: Advisor: Account Name ↑ > Security Type ↑ > Carrier/Fund Company ↑ >

Client	Financial Account #	Trade Date	Tran Type	Premium/Investment Amount	GDC (Production)	Rate	Commission Payable	Description	Click for Detail
Grand Totals (0 records)				\$0.00	\$0.00		\$0.00		

If you have any questions about the Compensation Dashboard or your weekly commission statements, please email commissions@leadersgroup.net.