

LEADERS link

Do you like getting paid for working with clients? Make sure your bank account is always up-to-date by utilizing the handy Home Office Request feature of LEADERSLink! Follow the steps below, and keep the funds flowing.

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

The screenshot displays the LEADERSlink dashboard interface. The top navigation bar includes 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (highlighted), 'Compliance Approvals', and 'Books & Records Docs'. The main content area is divided into several sections:

- Dashboard:** Shows data as of 10/10/2017 2:24 PM. It includes three sub-sections:
 - Compensation Overview:** A table with rows for Beginning Balance, Change Since Last Payout, Gross Commission Payable, Less Amount On Hold, and Net Commission Payable, all showing \$0.
 - Compensation Activity:** A table with rows for Current Week (Net), Previous Week (Net), Month-to-Date (Net), Quarter-to-Date (Net), and Year-to-Date (Net), all showing \$0.
 - Hold/Suspense Report:** A table with columns for Client, Hold Reason, and Sum of Commission Payable. The total is 0.00.
- 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.'

The left sidebar contains 'LeadersLink Resources' (Advizr, RightBridge, Training Videos, Starlight Portfolios, FINRA Manual), 'Create New...', 'Shortcut' (Calendar), 'Recent Items' (John Test, BRD-3325, Test Business, Household, Test Household, Test), and 'Messages and Alerts'.

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

Home Office Requests
Home

View: All Go! 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 "Update Bank EFT Information" 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: Update Contact Information


- Add/Change Authorized User
- Advisor Request to Add / Drop State Registrations
- Update Bank EFT Information**
- Update Contact Information

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. Once one is chosen, click 'continue'

6. On the following screen that shows up, complete any information that you have, please keep in mind any field with a red bar next to them are required before moving on:

 Home Office Request Edit
New Home Office Request

Home Office Request Edit Save Save & New Cancel

Information


Advisor  

Record Type **Update Bank EFT Information**

Submission Status **Not Submitted**

New Bank Information

Line of Business

Account Type 

Account Holder Name

Bank Name

Account Number

ABA/Routing Number

Bank Account Type

For Leaders Group Use Only

Voided Check Attached

Signed Form Attached

Notes

Description

Save Save & New Cancel

7. Once the fields are filled out, click 'save'

8. On the following screen, verify ensures the information is **complete and accurate**.

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


Home Office Request
CMP-4906 Print

[+ Show Feed](#)

[« Back to List: Home Office Requests](#)

[Notes & Attachments \(0\)](#) | [Approval History \(2\)](#)

Home Office Request Detail

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

Home Office Request	CMP-4906	Record Type	Update Bank EFT Information
Advisor	Bill Advisor	Submission Status	Approved

New Bank Information

Line of Business		Account Number	123456489798400000000
Account Type		ABA/Routing Number	123456789
Account Holder Name	Bill Advisor	Bank Account Type	Checking
Bank Name	Bank of America		


For Leaders Group Use Only

Voided Check Attached

Signed Form Attached

Notes

Description

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

Notes & Attachments

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

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:

Show Feed

« Back to List: Home Office Requests

Notes & Attachments (0) | Approval History (2)

Home Office Request Detail

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

Home Office Request CMP-4906
Advisor [Bill Advisor](#)

Record Type Update Bank EFT Information
Submission Status Approved

New Bank Information

Line of Business

Account Type

Account Holder Name [Bill Advisor](#)

Bank Name Bank of America

Account Number 12345648979840000000

ABA/Routing Number 123456789

Bank Account Type Checking

For Leaders Group Use Only

Voided Check Attached

Signed Form Attached

Notes

Description

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

Notes & Attachments

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

No records to display

Approval History

[Submit for Approval](#)

Action	Date	Status	Assigned To	Comments	Overall Status
Step: Step 1					Approved
	2/22/2018 12:32 PM	Approved	Registrations		
Approval Request Submitted					
	2/22/2018 12:26 PM	Submitted	Bill Advisor		

[Back To Top](#)

Always show me [fewer](#) / [more](#) records per related list

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