

LEADERSlink tutorials:

# UPDATING PERSON ACCOUNT

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The purpose of the “Client Update” is for anyone to log into LeadersLink, view a client, and make a change to that data. Any change to a “Person Account” can be made via the “Client Update”. While this process won’t instantaneously update your client’s information, it will notify the Accounts Management team of the information that should be updated, and it will be updated within a timely manner.

If for any reason, there is an update that needs to happen right away, please complete this process then email the Accounts Management team at [accounts@leadersgroup.net](mailto:accounts@leadersgroup.net) and they can make it a priority.

Begin by selecting **New Compliance Approval** from the **Person Account** tab.

Accounts Home Office Requests Books & Records Docs Invoices

Person Account  
**John T Client**

Show Feed

Open Activities (2) | Activity History (0) | NAF (1) | **Compliance Approvals (Client) (2)** | Client Meetings (1) | Financial Accounts (Client) (2) | Holdings (Client) (1) | Books & Records Docs (2) | Notes & Attachments (2)

**Compliance Approvals (Client)** New Compliance Approvals

Action	Order Memo Name	NAF	Product Type	Company	Investment Amount	Check Enclosed	Source of Funds	Sent Date
Edit   Del	OM-1089		529 Plans	American Funds	\$44,444.00		Mutual Fund	
Edit   Del	OM-1714							
Edit   Del	OM-1753							

Household Member Type

Select **Client Update** from the **Record Type** drop-down menu.

Accounts Home Office Requests Books & Records Docs Invoices

New Compliance Approvals  
**Select Compliance Approvals Record Type**

Select a record type for the new compliance approvals.

**Select Compliance Approvals Record Type**

Record Type of new record: **Client Update** ▼

Continue Cancel

Available Compliance Approvals Record Types

Record Type Name	Description
Client Update	
Trade Blotter	

As you can see, the **Client Update** looks very similar to the layout of the **Person Account**.

Accounts Home Office Requests Books & Records Docs Invoices

Compliance Approvals Edit  
**New Compliance Approvals**

Compliance Approvals Edit

**Information**

Client	<input type="text" value="John T Client"/>	<input type="button" value="🔍"/>	Martial Status	<input type="text" value="Divorced"/>
First Name	<input type="text" value="Jonathan"/>		Birthdate	<input type="text" value="11/09/2017"/>
Middle Name	<input type="text" value="Thomas"/>		Unique ID	<input type="text"/>
Last Name	<input type="text"/>			
Suffix	<input type="text" value="Jr"/>			
Advisor Name	<input type="text"/>	<input type="button" value="🔍"/>		

**ID Info**

ID Type	<input type="text" value="--None--"/>	ID State	<input type="text" value="--None--"/>
ID Number	<input type="text"/>	ID Exp Date	<input type="text" value="11/09/2017"/>

**Contact Info**

Phone Update	<input type="text"/>
Email Update	<input type="text"/>

**Address**

Primary Street Address	<input type="text"/>	New Client Mailing Street	<input type="text"/>
Primary City	<input type="text"/>	New Client Mailing City	<input type="text"/>
Primary State	<input type="text" value="--None--"/>	New Client Mailing State	<input type="text"/>
Primary Zip	<input type="text"/>	New Client Mailing Zip	<input type="text"/>

**Employment Info**

Employment Status	<input type="text" value="--None--"/>	Employer Address	<input type="text"/>
Employer	<input type="text"/>	Employer City	<input type="text"/>
Type of Business	<input type="text"/>	Employer State	<input type="text" value="--None--"/>
Title	<input type="text"/>	Employer Zip	<input type="text"/>

**Emergency Contact**

Emergency Contact Name	<input type="text"/>	Emergency Contact Phone Number	<input type="text"/>
Emergency Contact Address	<input type="text"/>	Emergency Contact Email	<input type="text"/>

The **Client** field at the top should automatically populate the client record in which you want to update. Please do not change this as it is a reference to which “Person Account” you are updating. *You only need to fill in the fields that you would like to update. All others you may leave blank.*

**Things to remember:**

- For SSN’s, ID Number, and phone, please only type in the number, no punctuation is needed.
- If you have a split rep that should be on this client, please use the lookup button next to the “Advisor Name” to find it. If you need help with this process, please review the client creating procedures.

Click the **Save** button at the top or the bottom when done. You should see the alert at the top indicating the **Compliance Approval has been saved.**

The screenshot shows a web interface for 'Compliance Approvals'. At the top, there is a navigation bar with 'Accounts', 'Home Office Requests', 'Books & Records Docs', and 'Services'. Below this is a header for 'Compliance Approvals' with the ID 'OM-1786'. A yellow banner at the top of the form area displays a success message: 'Compliance Approvals has been saved'. Below the banner are several tabs: 'DETAILS', 'APPROVALS', 'DETAILS/NOTES', 'COMMON ACTIONS', and 'DETAILS'. The main section is titled 'Compliance Approvals Detail' and contains a form with the following fields:

- Client Information:** Client Name (OM-1786), Client (John F Clark), Client Address (10000), SS Advisor (Eunice).
- ID Info:** ID Type, ID Number, ID Start, ID End Date.
- Contact Info:** Phone Update, Email Update.
- Address:** Primary Street Address, Primary City, Primary State, Primary Zip, New Client Mailing Street, New Client Mailing City, New Client Mailing State, New Client Mailing Zip.
- Employment Info:** Employment Status, Employer, Type of Business, Title, Employer Address, Employer City, Employer State, Employer Zip.
- Emergency Contact:** Emergency Contact Name, Emergency Contact Address, Emergency Contact City, Emergency Contact State, Emergency Contact Zip, Emergency Contact Phone Number, Emergency Contact Email.

At the top of the form, there are buttons for 'Save', 'Close', 'Share', and 'Submit for Approval'.

Click **Submit for Approval**.

**\*\*If you do not click this, the Accounts Management team will not be made aware that you would like to update a client’s record.**

Once submitted, our Accounts Management team will update your client record within 2 business days.

**Family Members with Accounts**  
Family Members with Accounts

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**Industry Affiliations**

Industry Affiliations	Position	10% shareholder	Company
Created By: <a href="#">Bill Adams</a> 11/09/2017 3:11 PM			Last Modified By: <a href="#">Bill Adams</a> 11/09/2017 3:11 PM

[Edit](#) [Delete](#) [Clone](#) [Sharing](#)

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**Open Activities** [New Task](#) [New Event](#)

No records to display

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**Activity History** [Log a Call](#) [Send an Email](#)

No records to display

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**Notes & Attachments** [New Note](#) [Upload Files](#)

No records to display

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**Compliance Approvals History**

Date	User	Connection	Action
11/09/2017 3:12 PM	<a href="#">Bill Adams</a>		Record locked.
11/09/2017 3:11 PM	<a href="#">Bill Adams</a>		Changed Order Memo Name to OM-1786. Created.

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**Approval History** [Recall Approval Request](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
<b>Step: Accounts Management Review (Pending for first approval)</b>						
	11/09/2017 3:12 PM	Pending	Account Management	Account Management		<span style="background-color: yellow;">Pending</span>
<b>Approval Request Submitted</b>						
	11/09/2017 3:12 PM	Submitted	<a href="#">Bill Adams</a>	<a href="#">Bill Adams</a>		

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Always show me fewer more records per related list.