

Subject: Updating Client's Contact Information	Product: Customer Loyalty Group	Approved on: 10/17/2025
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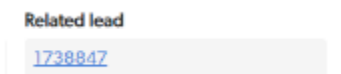
Purpose:

Updating client's contact information in QuickBase.

Policy:

- Client requested to update personal information.
 - Phone number
 - Email
 - Mailing address
- Only update the SPAA when the client's address changes. GH does not require a new SPAA for phone or email updates.

Procedure:

1. On the client home page, click the Related lead link


The screenshot shows a 'Related lead' label above a grey box containing the number '1738847' in blue text.
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2. Go to the Contact Information tab.
3. Edit mode, then update information that needs to be made for client.
4. Click the Save & Close button.
5. A new SPAA needs to be sent to the client and signed to ensure Global has all the correct and updated contact information.
 - Please follow the [Updating Banking Information](#) SOP. However, keep in mind no request is needed. Verify the information you just updated for the client is updated on the SPAA. Have client sign and upload to Crush FTP.

Exceptions:

- Client was unable to authenticate via MFA
 - We need to do secondary verification (Full name, Address, last 4 of social) and verify the old email address. If client is unable to verify, we are unable to make the change.

Latest Revision Date: 10/16/2025	Page 1 of 1	Author of Latest Revision: Shelby Blevins
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