

Subject: Accessing Global	Product: Customer Loyalty Group	Approved on:
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Purpose:

Accessing a client's Global account from QuickBase.

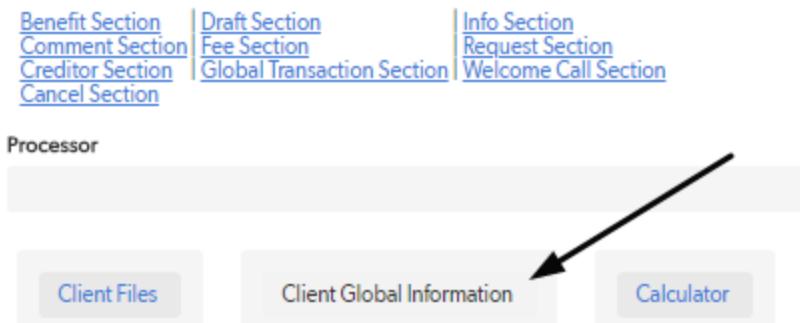
Policy:

- Verify up-to-date status regarding client's Global account
- Client is waiting to receive a refund/withdrawal and would like to check the status
- Ensure scheduled drafts and/or payments have successfully processed and cleared

Procedure:

- As pictured below, click on the *Client Global Information* button from the client's page

▼ **Section**



- As pictured below, each section will contain the same information provided on Global Client Solutions website

Account ID	Client ID	Active	Draft Authorized	Current Balance: Pending Balance	
Validation Status	Document Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Original ID	Close Scheduled Date
Company ID				Policy Group ID	1892
Client Information			CO Client Information		
First Name	Last Name	M.I.	First Name	Last Name	M.I.
Social Security #	Date of Birth		Social Security #	Date of Birth	1/1/1900
Address 1	Address 2		Bank Routing #	Bank Account #	Bank Account Type
City	State	Zip Code	*****	*****	Checking ▼
Phone #	Email Address		Last Modified Date	Creation Date	
Challenge Phrase			1/15/2018 9:54:40 AM	12/1/2017 3:00:59 PM	
Draft (Show Details...)			Last Modified By	Closed Date	
Fee (Show Details...)			Statements		

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In the printed form this is an uncontrolled document. The official version can be found online.

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Exceptions:

1. None

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