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

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
    a. 

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.