

Subject: Client Language Preference Update	Product: Client Success	Approved on: 4/28/2025
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Purpose:

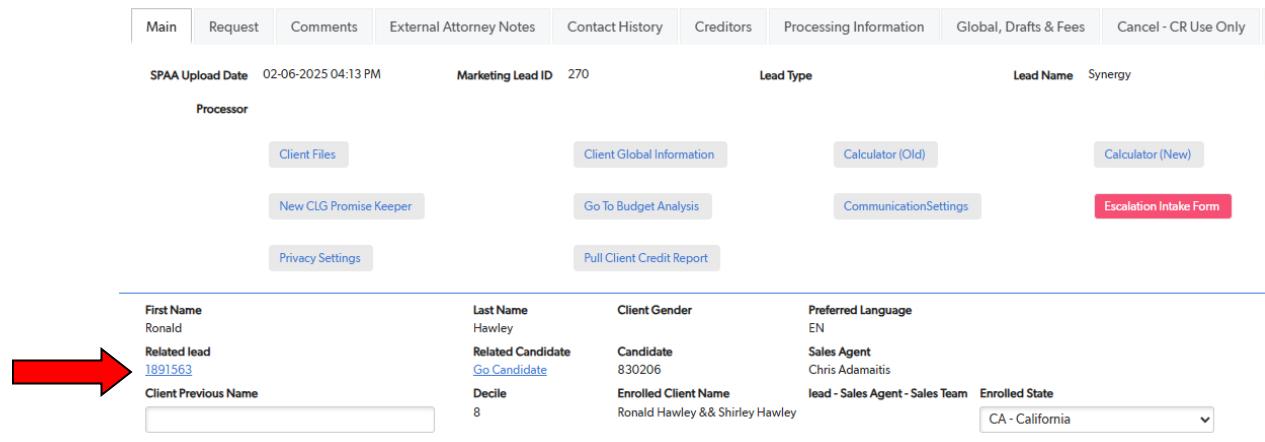
To update a client's preferred language in the system to ensure accurate smart routing through telephony.

Policy:

If a client requests to communicate in Spanish, agents are required to update the client's language preference accordingly. This ensures clients are routed to the appropriate bilingual support team when contacting us. Agents will update the language preference by editing the **Client Lead Page** and selecting the correct option under **Language**.

Procedure:

1. Open the client's page.
2. On the "Main" tab, click the hyperlink for "Related Lead"



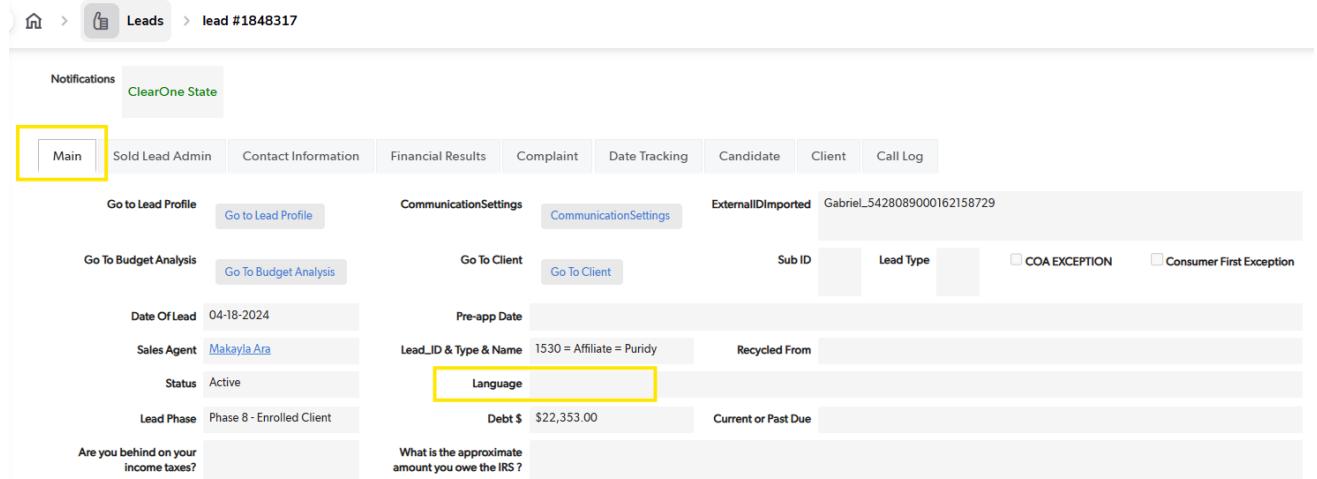
The screenshot shows a software interface for managing client leads. At the top, there is a navigation bar with tabs: Main, Request, Comments, External Attorney Notes, Contact History, Creditors, Processing Information, Global, Drafts & Fees, and Cancel - CR Use Only. Below the navigation bar, there is a header with the following information: SPAA Upload Date (02-06-2025 04:13 PM), Marketing Lead ID (270), Lead Type, Lead Name (Synergy), and a small 'E' icon. Underneath the header, there is a section titled 'Processor' with several buttons: Client Files, Client Global Information, Calculator (Old), Calculator (New), New CLG Promise Keeper, Go To Budget Analysis, CommunicationSettings, Escalation Intake Form, Privacy Settings, and Pull Client Credit Report. The main content area displays client details in a grid format. A red arrow points to the 'Related lead' section, which shows the ID 1891563. Other visible fields include First Name (Ronald), Last Name (Hawley), Client Gender (EN), Preferred Language (EN), Related Candidate (Candidate 830206), Sales Agent (Chris Adamaitis), Decile (8), Enrolled Client Name (Ronald Hawley & Shirley Hawley), lead - Sales Agent - Sales Team, Enrolled State (CA - California), and a dropdown menu for Enrolled State.

3. Click "Edit" in the top right corner
4. On the "Main" tab, update language under "Lead_ID & Type & Name"

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

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The screenshot shows a software interface for managing leads. At the top, there's a navigation bar with icons for Home, Leads, and a specific lead number (lead #1848317). Below the navigation is a header with 'Notifications' and 'ClearOne State'. A top menu bar includes 'Main', 'Sold Lead Admin', 'Contact Information', 'Financial Results', 'Complaint', 'Date Tracking', 'Candidate', 'Client', and 'Call Log'. The 'Main' item is highlighted with a yellow box. Below this, several lead details are listed in a grid format. A yellow box highlights the 'Language' field under the 'Lead ID & Type & Name' section. Other fields shown include 'Go to Lead Profile', 'Communication Settings', 'External ID Imported' (Gabriel_5428089000162158729), 'Go To Budget Analysis', 'Go To Client', 'Sub ID', 'Lead Type', 'COA EXCEPTION', 'Consumer First Exception', 'Date Of Lead' (04-18-2024), 'Pre-app Date', 'Sales Agent' (Makayla Ara), 'Lead_ID & Type & Name' (1530 = Affiliate = Puridy), 'Recycled From', 'Status' (Active), 'Lead Phase' (Phase 8 - Enrolled Client), 'Debt \$' (\$22,353.00), 'Current or Past Due', and 'Are you behind on your income taxes?'. A question at the bottom asks 'What is the approximate amount you owe the IRS?'.

5. Save & close.

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