

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 the 'Client Lead Page' with the 'Main' tab active. The page displays client information and various action buttons. A red arrow points to the 'Related lead' link in the 'Client Information' section.

Main	Request	Comments	External Attorney Notes	Contact History	Creditors	Processing Information	Global, Drafts & Fees	Cancel - CR Use Only
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SPAA Upload Date 02-06-2025 04:13 PM Marketing Lead ID 270 Lead Type Lead Name Synergy E

Processor

Client Files Client Global Information Calculator (Old) Calculator (New)

New CLG Promise Keeper Go To Budget Analysis CommunicationSettings Escalation Intake Form

Privacy Settings Pull Client Credit Report

First Name Ronald	Last Name Hawley	Client Gender	Preferred Language EN
Related lead 1891563	Related Candidate Go Candidate	Candidate 830206	Sales Agent Chris Adamaitis
Client Previous Name <input type="text"/>	Decile 8	Enrolled Client Name Ronald Hawley && Shirley Hawley	lead - Sales Agent - Sales Team Enrolled State CA - California

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

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Leads > lead #1848317

Notifications

ClearOne State

Main

Sold Lead Admin

Contact Information

Financial Results

Complaint

Date Tracking

Candidate

Client

Call Log

Go to Lead Profile

Go to Lead Profile

Go to Budget Analysis

Go to Budget Analysis

Date Of Lead

04-18-2024

Sales Agent

Makayla Ara

Status

Active

Lead Phase

Phase 8 - Enrolled Client

Are you behind on your income taxes?

CommunicationSettings

CommunicationSettings

Go To Client

Go To Client

Pre-app Date

Lead_ID & Type & Name

1530 = Affiliate = Puridy

Language

Debt \$

\$22,353.00

What is the approximate amount you owe the IRS ?

ExternalIDImported

Gabriel_5428089000162158729

Sub ID

Lead Type

COA EXCEPTION

☐

Consumer First Exception

☐

Recycled From

Current or Past Due

5. Save & close.

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