

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:

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

▼ **Section**

Navigation links: [Benefit Section](#), [Draft Section](#), [Info Section](#), [Comment Section](#), [Fee Section](#), [Request Section](#), [Creditor Section](#), [Global Transaction Section](#), [Welcome Call Section](#), [Cancel Section](#)

Processor

Buttons: [Client Files](#), [Client Global Information](#), [Calculator](#)

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

Current Balance:
Pending Balance:

Account ID: ClientID: Active: ☒ Draft Authorized: ☒ Drafts Will Process: ☒
Validation Status: Document Status: Original ID: Close Scheduled Date:
Company ID: Policy Group ID:
1892

Client Information

First Name: Last Name: M.I.:
Social Security #: Date of Birth:
Address 1: Address 2:
City: State: Zip Code: Country:
Phone #: Email Address:
Challenge Phrase:

CO Client Information

Bank Routing #:
Bank Account #: Bank Account Type:
Last Modified Date: Creation Date:
Last Modified By: Closed Date:
Statements:

Draft (Show Details...)
Fee (Show Details...)

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Exceptions:

1. None

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