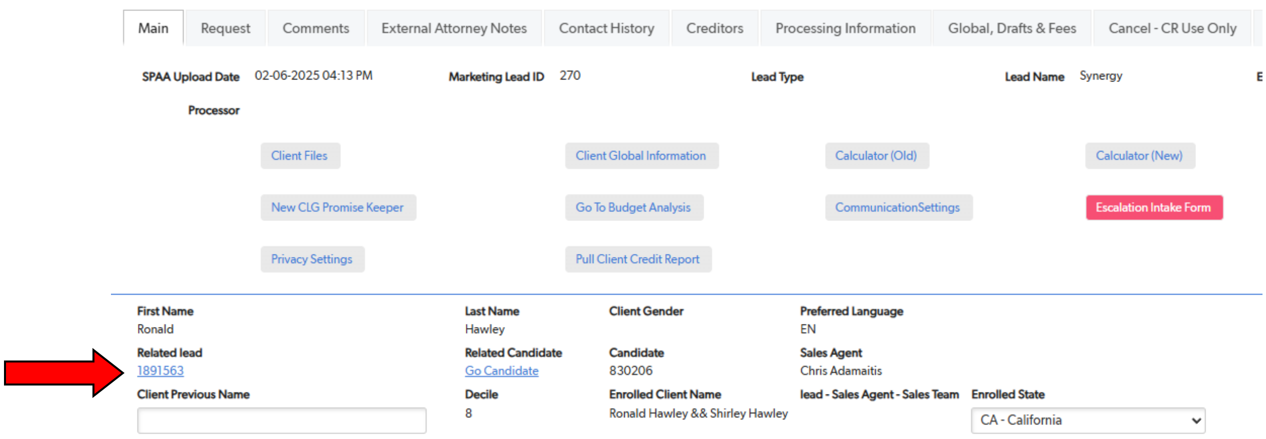
Subject:	Product:	Approved on:
Client Language Preference Update	**Client Success**	**4/28/2025**

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

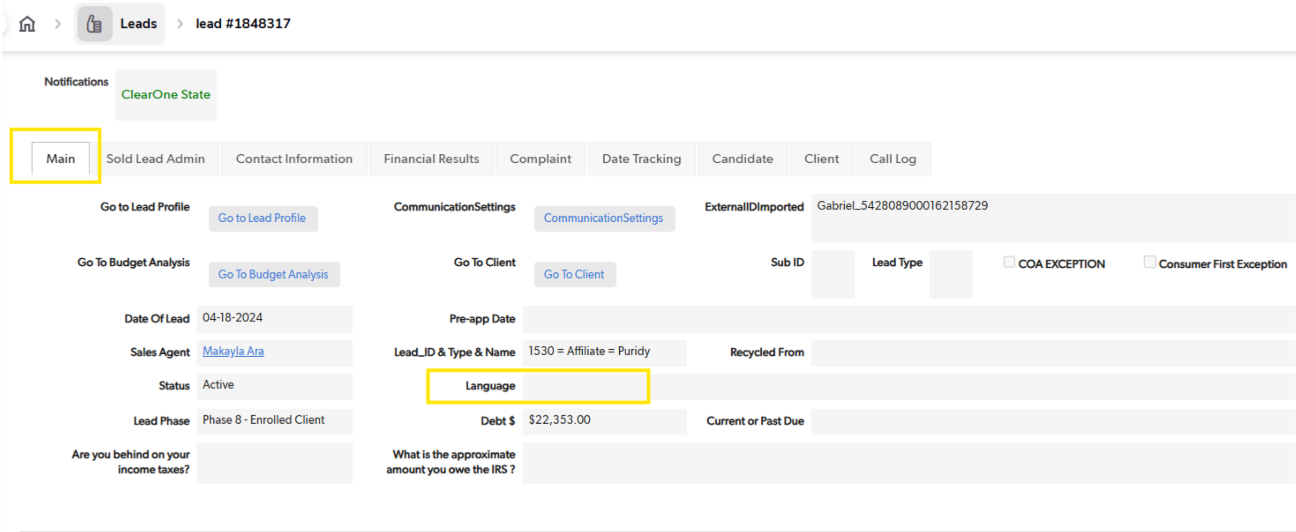
Policy:
If a client requests to communicate in Spanish, agents are required to update the client's language preference accordingly. This ensures clients are routed to the appropriate bilingual support team when contacting us. Agents will update the language preference by editing the **Client Lead Page**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



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


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
CommunicationSettings
ExternalIDImported
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
Language
Lead Phase
Phase 8 - Enrolled Client
Debt $
$22,353.00
Current or Past Due
Are you behind on your income taxes?
What is the approximate amount you owe the IRS ?

5. Save & close.