

Completing the Optional Profit Share Lock-In Agreement SAP Sales Cloud | Job Aid

Description

This job aid will demonstrate how you can access your Profit Share Lock-In offer and make your selection within SAP Sales Cloud.

Note: Commercial Lines Profit Share (CLPS) and Farm Lines Profit Share (FLPS) are two separate forms. This means you could be eligible for CLPS Lock-In and/or FLPS Lock-In. If eligible for both, you will have two lock-in offers to accept/decline. Please refer to your Annual Commercial Lines Profit Share Statement and/or Annual Farm Profit Share Statements for September. If a payment amount is shown on your September statement, you are eligible for lock-in for that line of business.

Accessing SAP Sales Cloud

Step 1

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You can access SAP Sales Cloud from Agent Center by navigating to the "Agency Tab".	Nationwide* Agency: Agency: Agency: Octor Personal Commercial & Agribusiness Billing & Claims Vest 6 & destror Reforms Technology Learning Center Interview of the second sec				
Under Reports select "Commissions & bonuses" and you will be automatically logged in.	Commonly used links How A1 is transforming Policy Guote Changes policy Status				
If clicking "Commissions & bonuses" takes you to a sign-in page, and you believe you should have access to SAP Sales Cloud, please contact your Principal or Agency Administrator. SAP is Single Sign On (SSO) – no login is required.	Cancel a policy Retrieve a Quote Print policy decs Book transfer View a policy Billing Claims Adde a payment / View Prile a claim account Check claim status Agent News Center				
If you also write Harleysville Policies, then you can access SAP Sales Cloud from @ccessHarleysville by navigating to My Agency Tab > AB & DB Statements. Click the Compensation — 2019 Forward link on the page and you will be automatically logged in.					

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Accessing the Workflow Module

Step 1

ActionNavigate to Apps in the upper righthand
corner (square box).Select "Workflow" from the drop-down.

Step 2

Action

Go to Home and Click on open cases assigned to me.

Note: You could qualify for Commercial Lines Profit Share Lock-In only, Farm Profit Share only or both Commercial Lines Profit Share Lock-In and Farm Profit Share Lock-In.

See the 3 scenarios highlighted below.

- Qualified for Farmowners Lock-In Only: You will only show one lock-in offer for Farm Profit Share Lock-In. Click on the case – Farmowners Plan Lock-In and proceed to the next step.
- Qualified for Commercial Lines Lock-In Only: You will only show one lock-in offer for Commercial Lines Profit Share Lock-In. Click on the case – Plan Lock-In and proceed to the next step.
- Qualified for BOTH Commercial Lines Lock-In and Farmowners Lock-In: You will have two separate cases for both lockin offers - Commercial Lines Profit Share Lock-In and Farmowners Profit Share Lock-In. Click on both cases, separately to review both lock-in offers to accept/decline





Review Lock-In Offer – Accept/Decline

Step 1

Action

Once you click on the case, the lock-in offer letter will need to be reviewed and then accepted/declined. The scenarios above outline the possible options. You could have only one lock-in agreement to review or two lock-in agreements to review.



Lock-In Decision Made

Step 1

Action		Screen
Once the agreement(s) have been accepted or declined, the case will show closed and you can see the status of the lock-in offer at the bottom of the agreement.	Construction was Construction was Construction Constructin Construction Construction Construction Construct	taterate in the second
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SAP Sales Cloud – Review Accepted/Declined Lock-In Agreement

Step 1

Once you have made your selection, you will be able to review the completed agreement.

- 1. Navigate to Apps in the upper righthand corner (square box) and Select Workflow from the drop-down.
- 2. Select "Find Cases" on the left side of the page.
- 3. In the search box, check the box "Include Closed Cases" and then select "Search."
- Closed cases should appear in your search results, select the lock-in offer you want to review – PLAN LOCK-IN (CLPS) or FARMOWNERS PROCESS PLAN LOCK-IN.
- 5. At the bottom of the lock-in agreement, it will show if the offer was accepted or declined and the date it was completed.

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By accepting a copy of these materials:

(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.

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