

SAP Sales Cloud

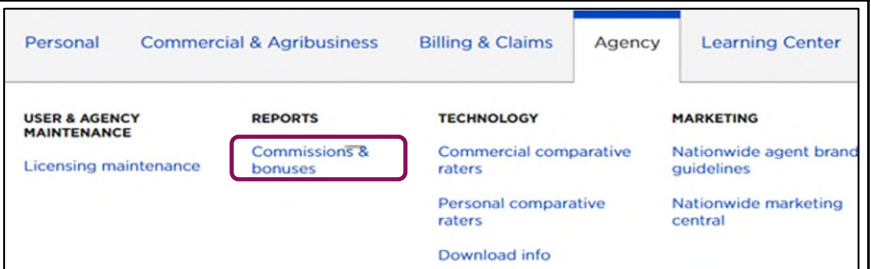
Updating Agency Bank Account Details



In this guide, you will learn how to update bank account information in SAP Sales Cloud.

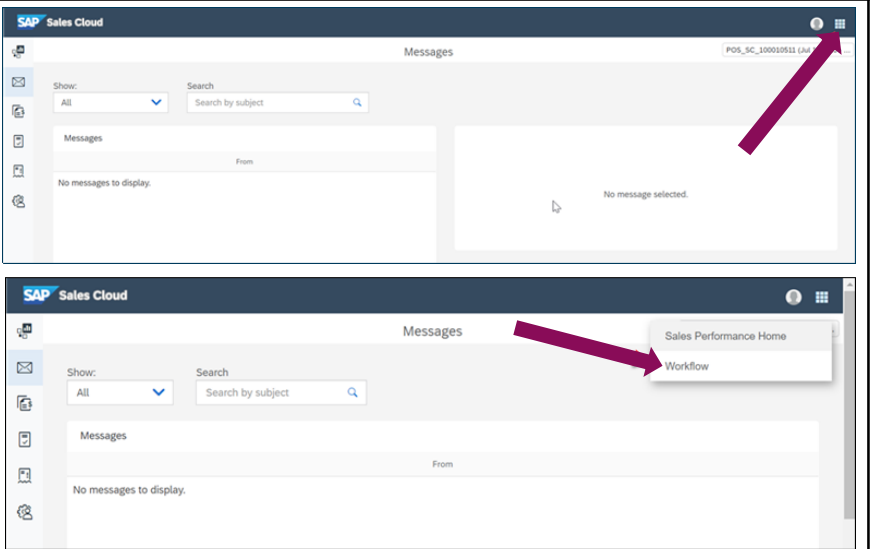
Accessing SAP Sales Cloud:

Step 1

Action	Screen
<p>For your Nationwide Compensation, you can access SAP Sales Cloud from the Agent Center Portal by navigating to <i>Agency > Reports</i> and Click <i>Commissions & bonuses</i> on the page and you will be automatically logged in.</p> <p>Note: If you do not see Commissions & Bonuses in your Agent Center drop-down, work with your agency admin to make banking updates.</p>	

Managing Bank Account Information on SAP Sales Cloud

Step 1

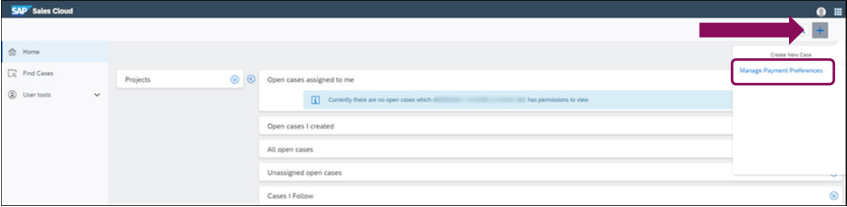
	Screen
<p>From the Sales Performance Home Page, Navigate to Apps and Select 'Workflow' from the drop-down.</p> <p>Note: You must 'Proxy As' the agency code you need to update first before navigating to workflow if multiple agency codes are available.</p>	

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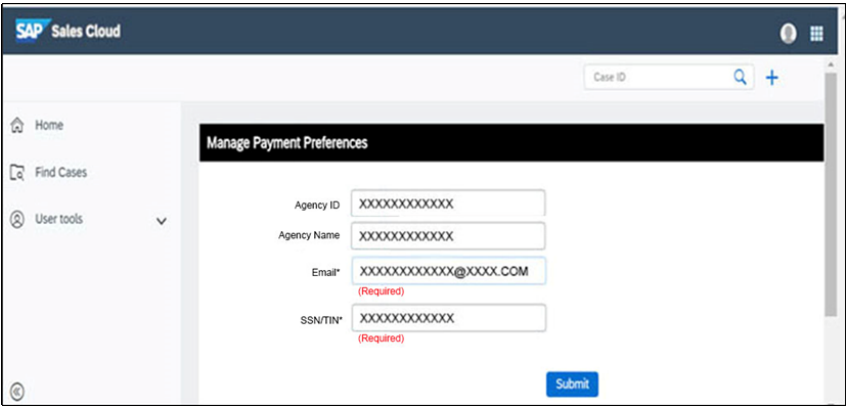
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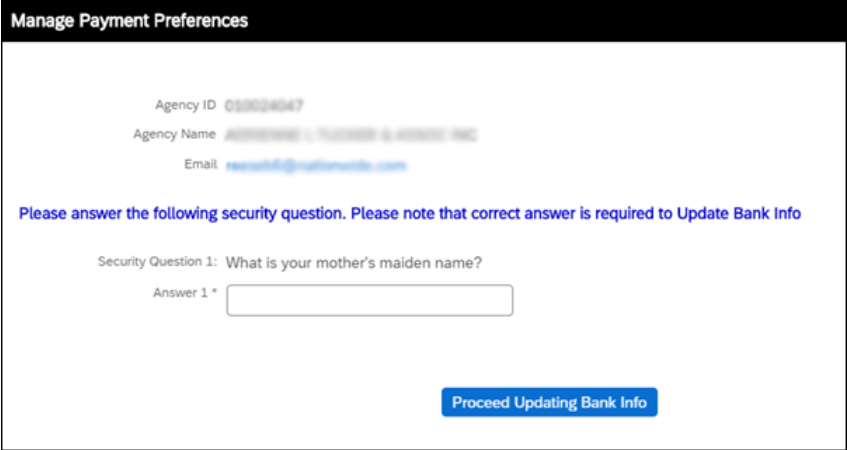
Step 2

Action	Screen
Select the '+' sign then Select 'Manage Payment Preferences' Workflow from the drop-down.	

Step 3

Action	Screen
Enter your email address and SSN/TIN then select the 'Submit' button.	

Step 4


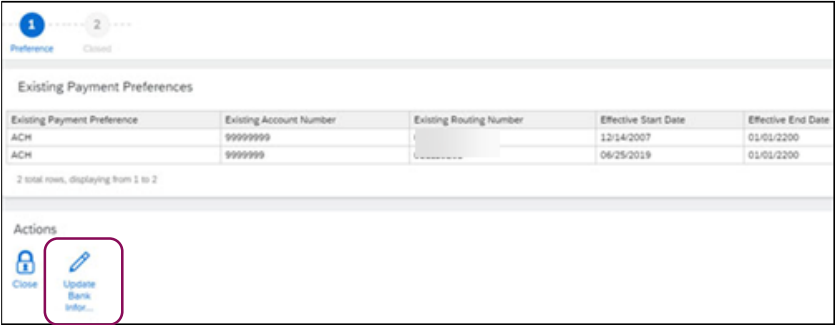
Action	Screen
<p>The first time you log in, you will be prompted to set up 2 security questions.</p> <p>Note: Next time you log in, you are only required to answer 1 of the security questions, set up at first login, to proceed. If you enter an incorrect answer for the security question after 2 tries you will be prompted to contact the licensing team at ALSMKTG@nationwide.com</p> <p>Once you answer your security question accurately, a note will quickly flash at the top of the screen: 'Case Successfully Added'</p>	

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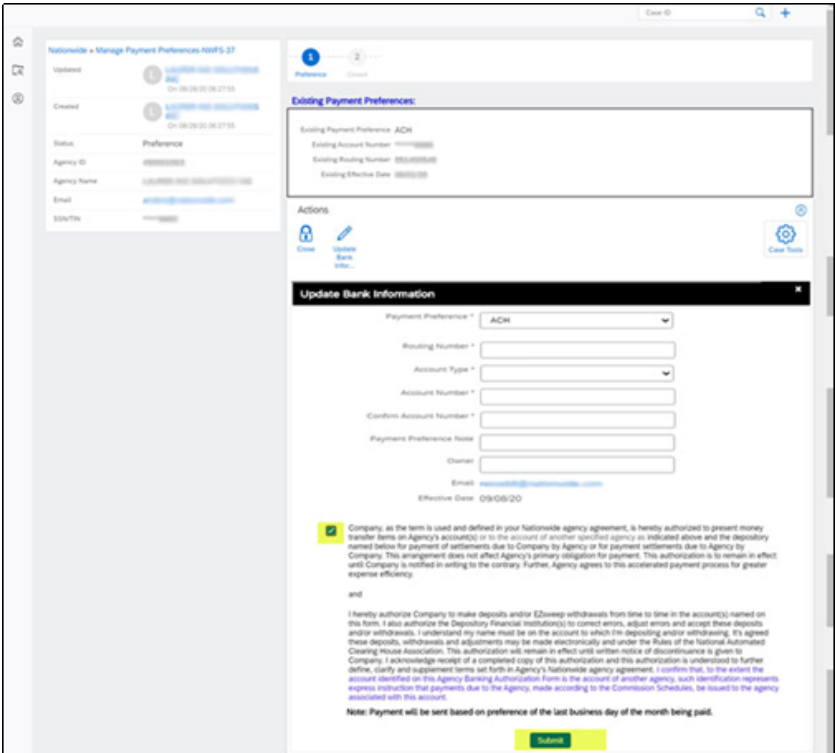
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Step 5

Action	Screen
<p>Select the 'Update Bank Information' icon.</p> <p></p> <p>Note: Current/Existing Bank Information will be displayed here if there is current information already connected to your account.</p>	

Step 6



Action	Screen
<p>Once the 'Update Bank Information' icon is selected, you will view and 'Update Bank Information' form.</p> <p>Any existing data will continue to be displayed in the 'Existing Payment Preferences' section.</p>	

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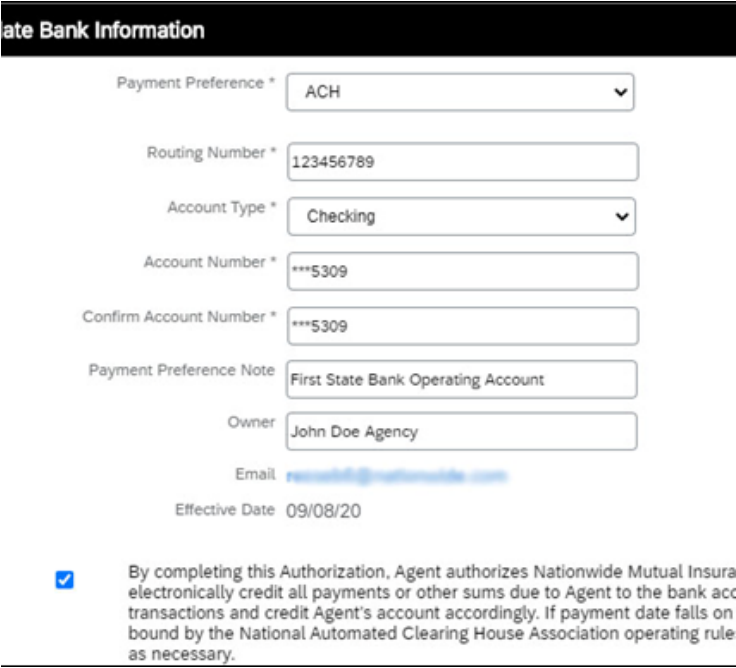
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Step 7

Action	Screen
<p>Select ACH in the Payment Preference field.</p> <p>This will display the additional fields of: Routing Number Account Number Confirmation Number</p> <p> Note: 'Owner' is the Bank Account Owner Name and is not required.</p>	

Step 8

Action	Screen
<p>Complete all required fields as identified. Any optional fields can be left blank. If you wish to leave a 'Payment Preference Note' you may do so in the optional field.</p> <p>Once complete, hit the submit button.</p> <p>The Agency bank Account Details are now updated. You will receive an email confirmation of the update.</p>	

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