Access, Navigation & Banking for Agents

SAP Sales Cloud | Job Aid

Description

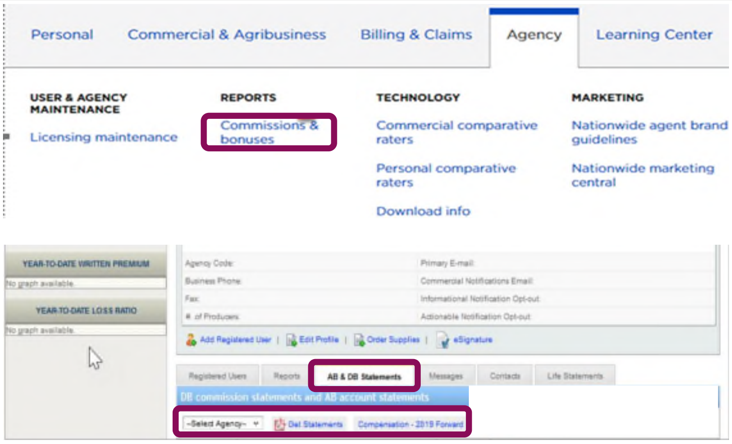
In the following guide, you will learn how to access your Compensation Statements from SAP Sales Cloud. SAP should be accessed using Google Chrome web browser.

Select the appropriate link from the list below to continue with the policy change.

- [Accessing SAP Sales Cloud]
- [Navigating SAP Sales Cloud]
- [Viewing Statements on SAP Sales Cloud]
- [Printing/Exporting Statements on SAP Sales Cloud]
- [Documents and approvals on SAP Sales Cloud]
- [Manage Banking Information on SAP Sales Cloud]

Accessing SAP Sales Cloud

Step 1

Action	Screen
For your Nationwide Compensation, you can access SAP Sales Cloud from the Agent Center Portal by navigating to “Agency” > “Reports” and selecting “Commissions & bonuses” on the page and you will be automatically logged in. If you also write Harleysville Policies, then you can access SAP Sales Cloud from @ccessHarleysville by navigating to “My Agency Tab” > “AB & DB Statements”. Select the “Compensation — 2019 Forward” link on the page and you will be automatically logged in.	

Navigating SAP Sales Cloud

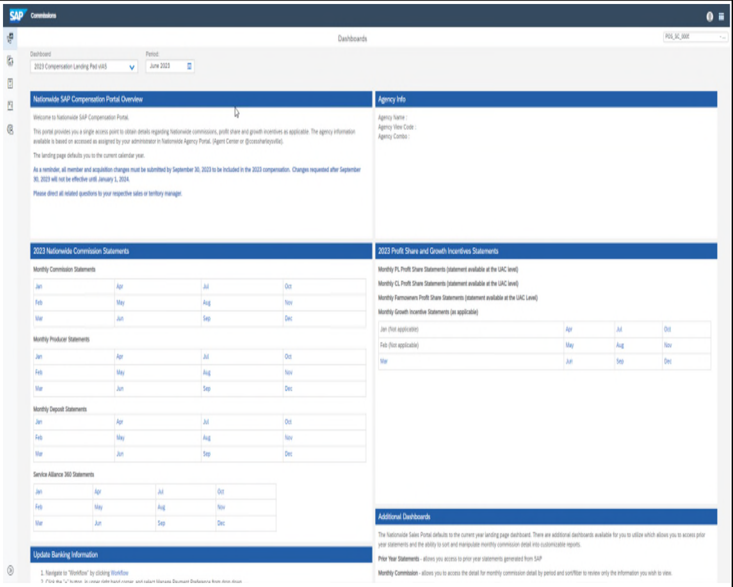
Step 1

Action

Once in SAP, you will be automatically directed to the Dashboard screen.

From there, you will be able to locate the Monthly Commission statements, Monthly Producer statements, Monthly Deposit statements, Service Alliance SA360 statements and Profit Share statements for that proxied Agency code.

Screen



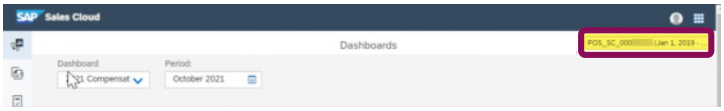
Step 2

Action

To check the proxied Agency code, you will look in the top right-hand corner for the section that displays the Agency code.

It will be labeled either, POS_SC_000##### or POS_UAC_000#####.

Screen



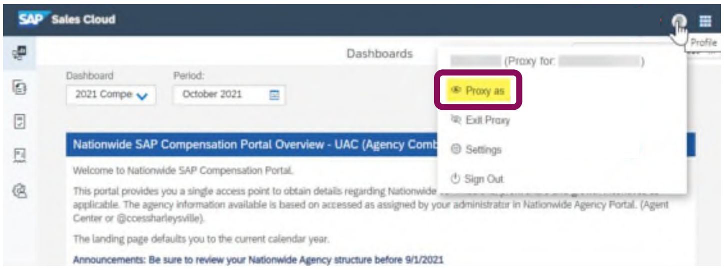
Step 3

Action

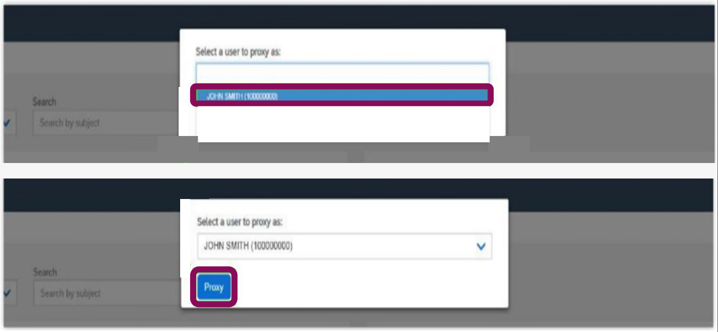
If the Agency code is not correct, you will need to change the proxied code to the correct one.

You will do this by selecting the profile icon at the top right-hand corner of the page and then selecting "Proxy as."

Screen

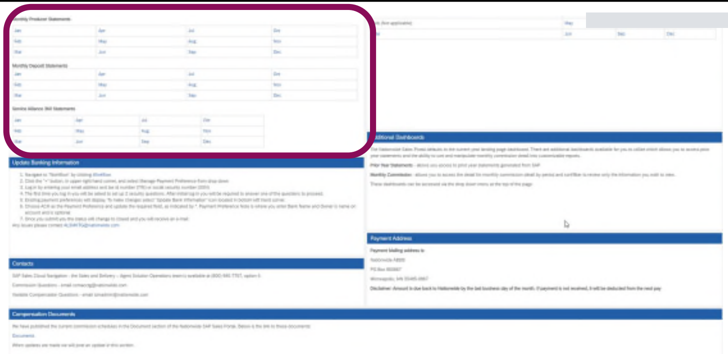


Step 4

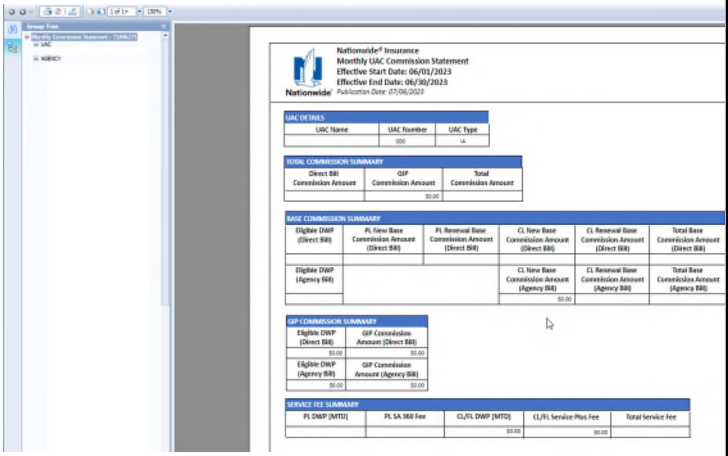
Action	Screen
After selecting "Proxy as," there will be a drop-down menu where you can select the correct Agency code. Once the correct code is selected choose "Proxy" and you will be re-directed to the Dashboard screen. SAP will remember the last proxied agency code the next time you log in.	

Viewing Statements on SAP Sales Cloud

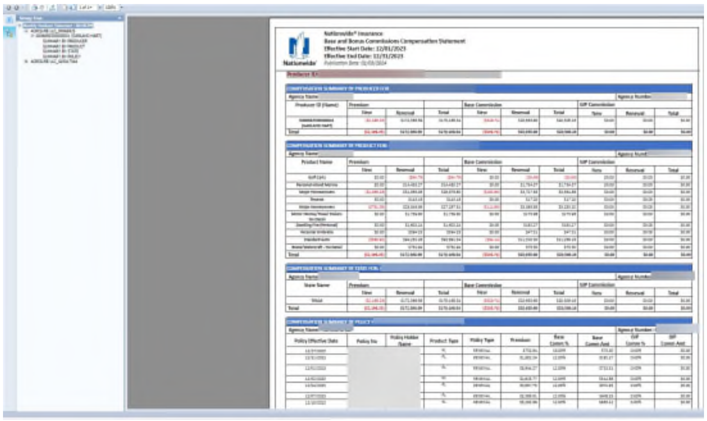
Step 1

Action	Screen
Monthly Commission Statements After selecting the desired month for the Commission Statement you want to view, you will be directed to another web browser tab that will display your Commission Statement. If you need to change the month you are viewing, go back to the Dashboard tab to select another month.	

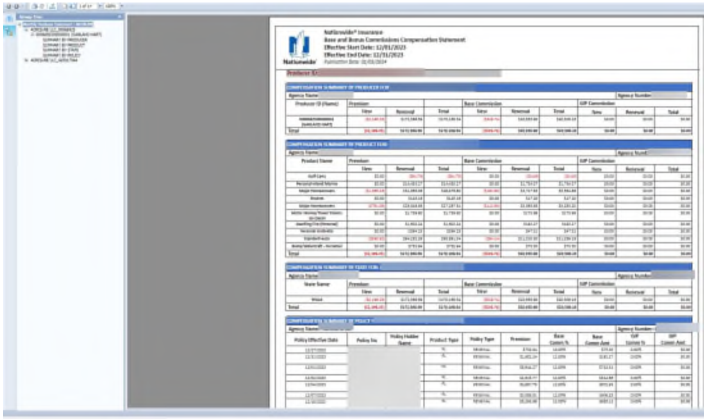
Step 2

Action	Screen
The Commission Statement will be formatted to show Agency totals on the first page and then Agency breakdowns on the following pages.	

Step 3

Action	Screen
As you scroll down, the commissions will be broken down by Agency code on separate pages. The commissions will include a Totals Page and a Policy Breakdown Page. If your Agency only has one Agency code, then there will only be one set of commission pages. **Note:** If your agency had any agency bill policy renewals, they would appear on the Commission Statement. This total is combined with your direct bill commission to show your total monthly commission amount. This will lead to your monthly deposit not equaling your total commission amount.	

Step 4

Action	Screen
Monthly Producer Statements Producer Statements will be broken down by each producer. Each producer will have their own page. The top of the statement will show the producer totals for that month. It will also show the producer's policies by product type and state. The bottom of the statement will have the policies individually.	 

Step 5

Action	Screen

Monthly Deposit Statements

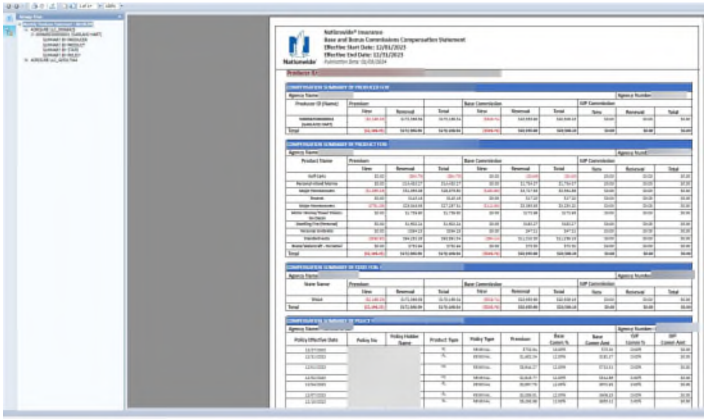
The monthly Deposit Statements will show all adjustments, deductions, and arrears balances that affect the deposited commissions.

The Earnings Summary will include commissions and bonus commissions earned.

The Payment Adjustments Summary will include any adjustments made to the Agency's commissions.

The Deductions Summary will include any Agency deductions made to the Agency's commissions.

The Total Summary will include the Arrears balance (negative previous month's balance) and the Amount Payable to the Agent.



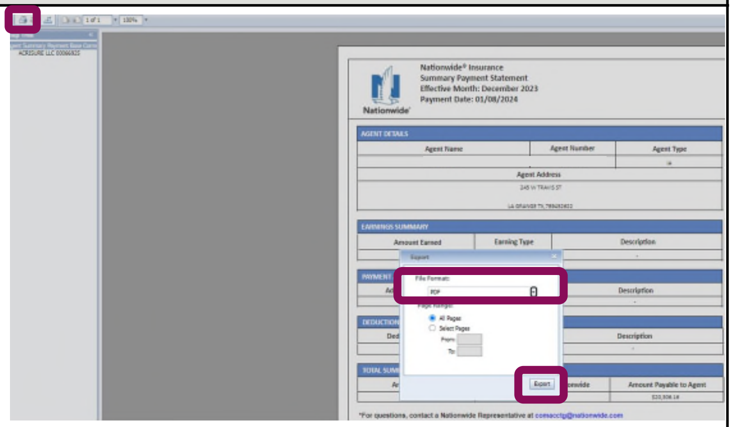
Printing/Exporting Statements on SAP Sales Cloud

Step 1

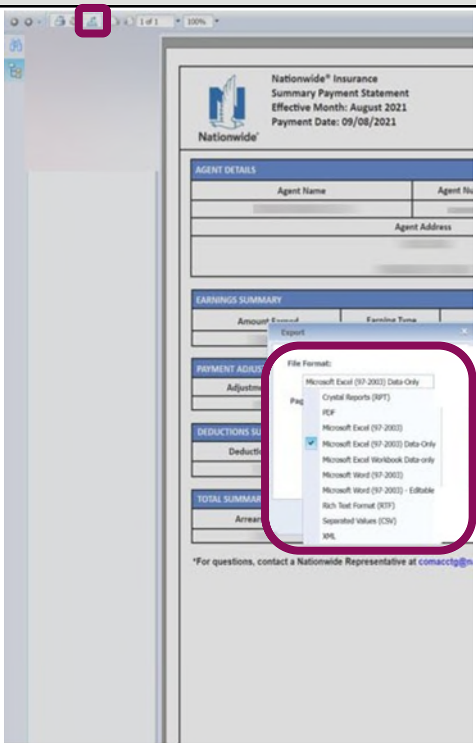
Action	Screen

To print or export your statement in SAP Sales Cloud, you will look in the top left-hand corner of the webpage to locate the printer icon.

This will allow you to export the statement as a PDF file for all or selected pages.

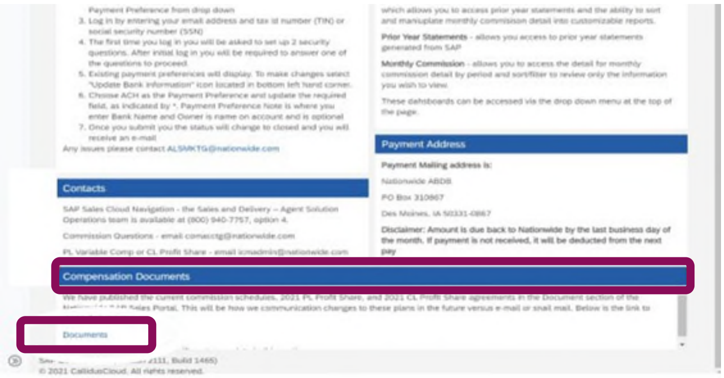
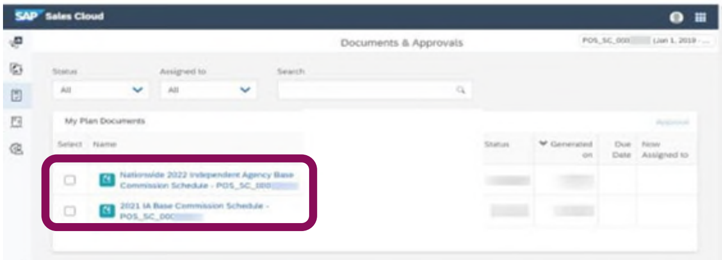


Step 2

Action	Screen
To print or export your statement into another format, other than PDF, you will select the export icon located next to the printer icon. This will give you the option to export the statement in many different formats. Be sure not to choose Crystal Reports (RPT) file type, as you will get an error message when trying to export. Also note, if you wish to export as an Excel file, be sure to export as Microsoft Excel (97-2003) Data Only. This will eliminate formatting issues when viewing the statement data.	

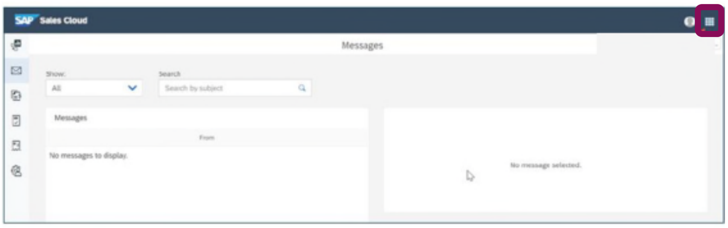
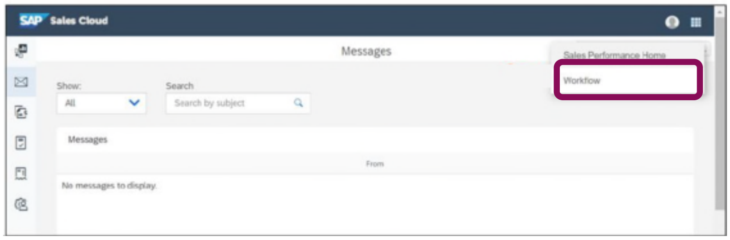
Documents & Approvals on SAP Sales Cloud

Step 1

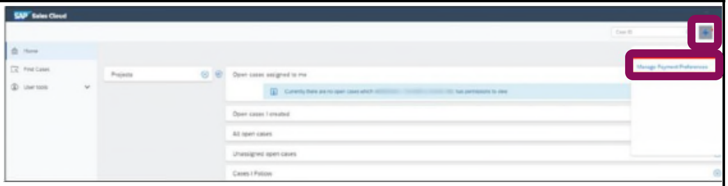
Action	Screen
To view documents such as Commission Schedules on SAP, you will want to navigate towards the bottom of the Dashboard page until you reach the "Compensation Documents" section. This will take you to the "Document & Approvals" page where you will be able to view/download your commission schedules, current contracts, and other documents.	

Manage Banking Information on SAP Sales Cloud

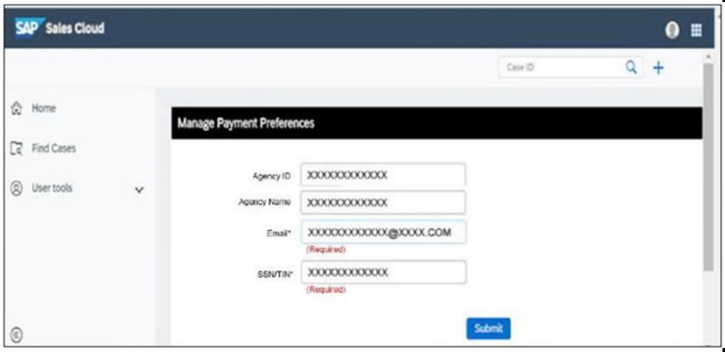
Step 1

Action	Screen
From the Sales Performance Home Page – Navigate to the Apps and select “Workflow” from the drop-down. **NOTE:** You must “Proxy As” the agency code you want to update first before navigating to Workflow.	

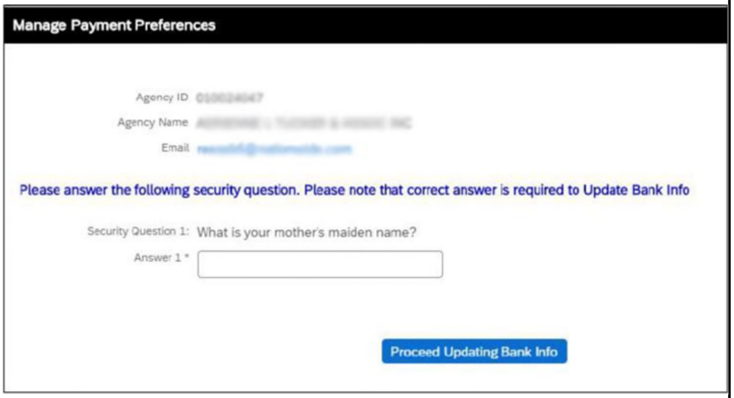
Step 2

Action	Screen
Select the “+” sign and select the “Manage Payment Preferences Workflow” from the drop-down.	

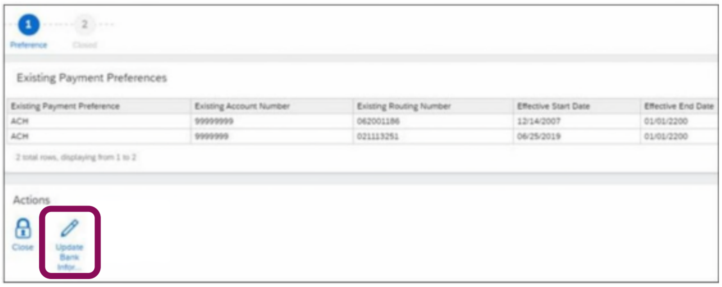
Step 3

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

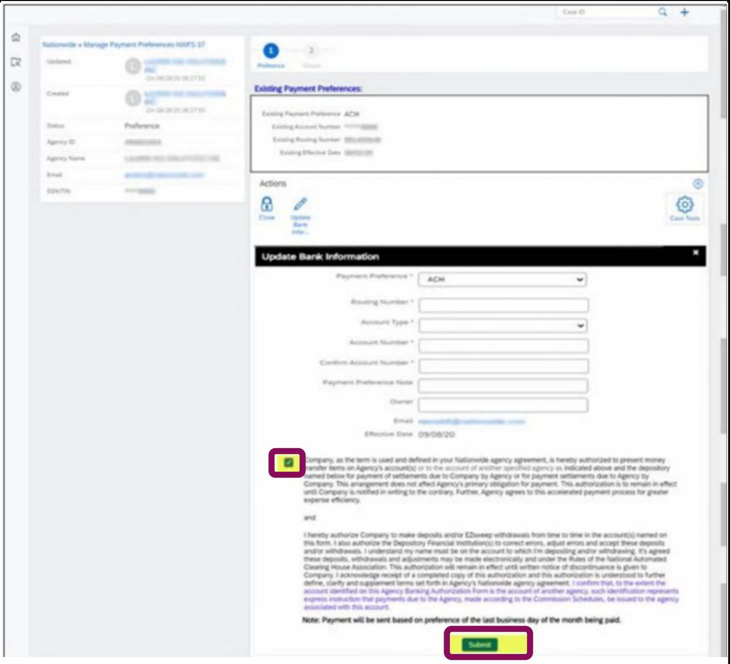
Step 4

Action	Screen
The first time you log in, you will be prompted to set up two security questions.	
In subsequent logins, you are only required to answer one security question that you set up during your initial login. Once you answer your security question accurately, a note will quickly flash at the top of the screen: "Case Successfully Added." **Note**: If you enter the incorrect "Answer" for the security question that is displayed a second time, you will be prompted to contact the Licensing team at ALSMKTG@nationwide.com	

Step 5

Action	Screen
Select the "Update Bank Information" Icon. NOTE: Current/Existing Banking Information will be displayed if there is an account already tied to your ID.	

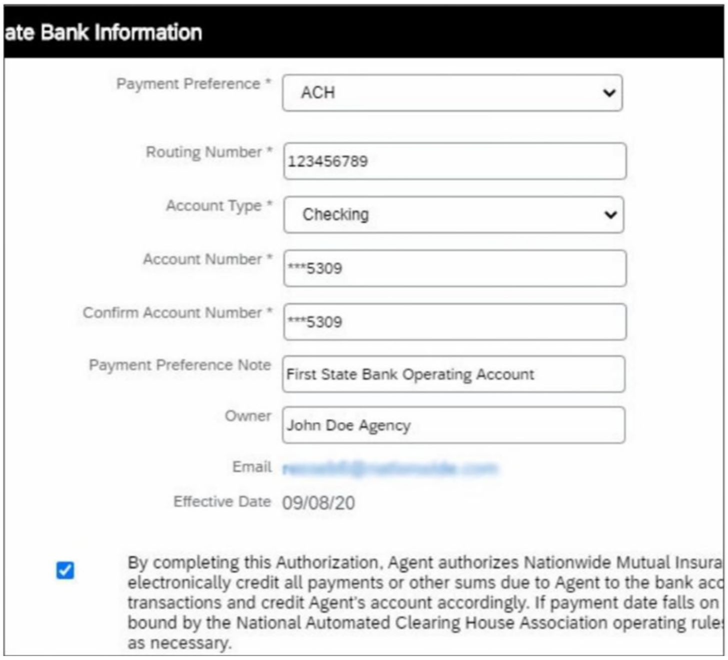
Step 6

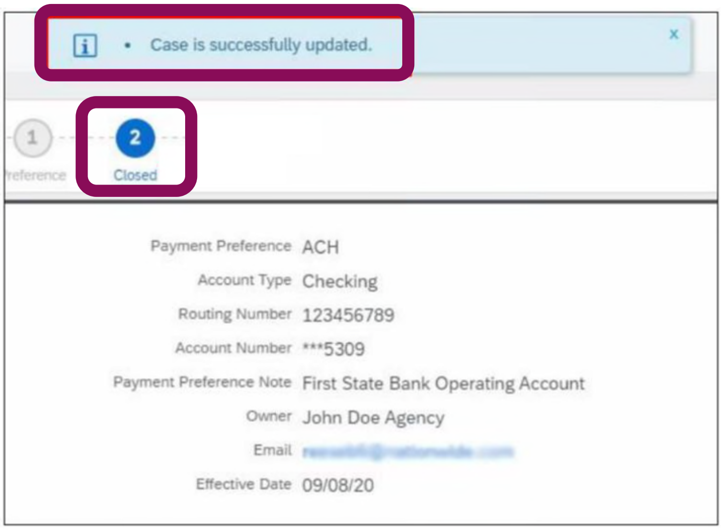
Action	Screen
Once the “Update Bank Information” icon is selected, you will be able to view and update the banking information form. Again, if there is banking information in the system for you, that data will be displayed within the “Existing Payment Preferences” section.	

Step 7

Action	Screen
You will be able to view the Routing Number, Account Number, and Confirmation Number after selecting “ACH” from the drop-down “Preferences” menu.	

Step 8

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>
All required fields will display.
The “Note” field is not required and can be left blank if there are no special notes to add.
Once completed, select the “Submit” button.
</td><td>


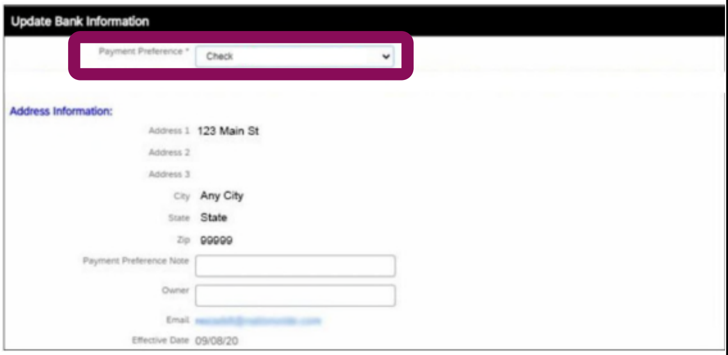
</td></tr>
<tr><td>
A note will quickly flash at the top of the screen: “Case Successfully Updated” in a blue square.
Once you select “Submit,” the update is complete and will be displayed as a “Closed” status.
</td><td>


</td></tr>
</table>

Step 9

Action	Screen
After the submission is complete with a closed status, you will receive an email notification. If you selected the “ACH” payment preference, you are finished. If you wish to have your payment preference as “Check,” continue to Step 10.	

Step 10

Action	Screen
If you choose the payment preference as “Check”, the Routing Number, Account Number and Confirmation Account Number will not be visible. Existing Address Information will be displayed. If the address on the screen is incorrect, contact the Licensing team at ALSMKTG@nationwide.com	

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