SAP Sales Cloud

Updating Agency Bank Account Details

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

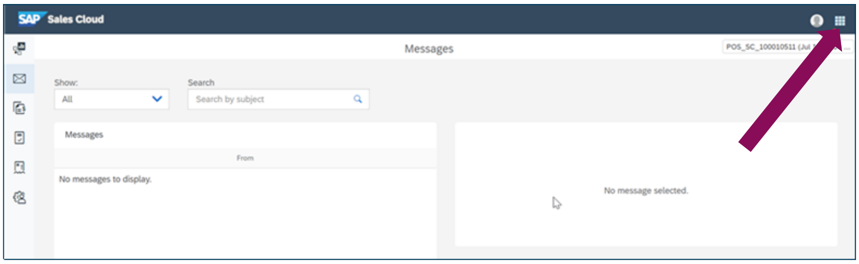
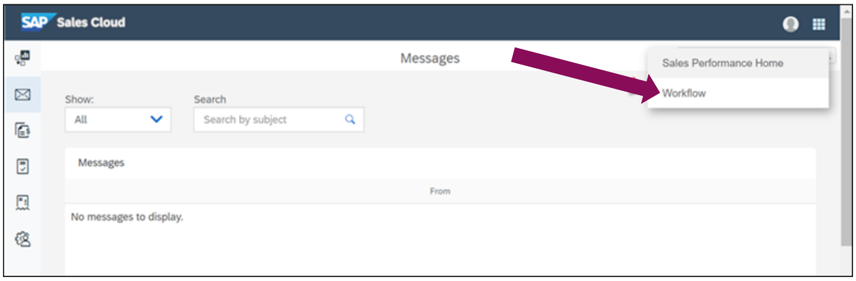
Accessing SAP Sales Cloud:

Step 1

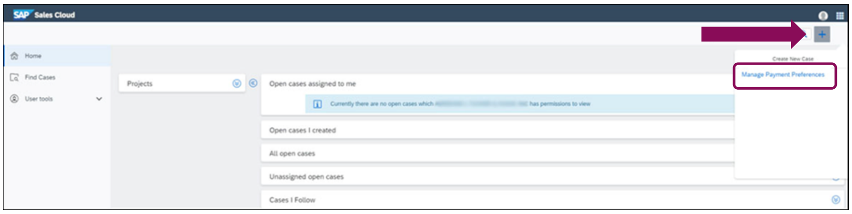
Action	Screen
For your ***Nationwide Compensation,*** you can access SAP Sales Cloud from **the Agent Center Portal** by navigating to *Agency > Reports* and Click *Commissions & bonuses* on the page and you will be automatically logged in. ! **Note:** If you do not see Commissions & Bonuses in your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

Managing Bank Account Information on SAP Sales Cloud

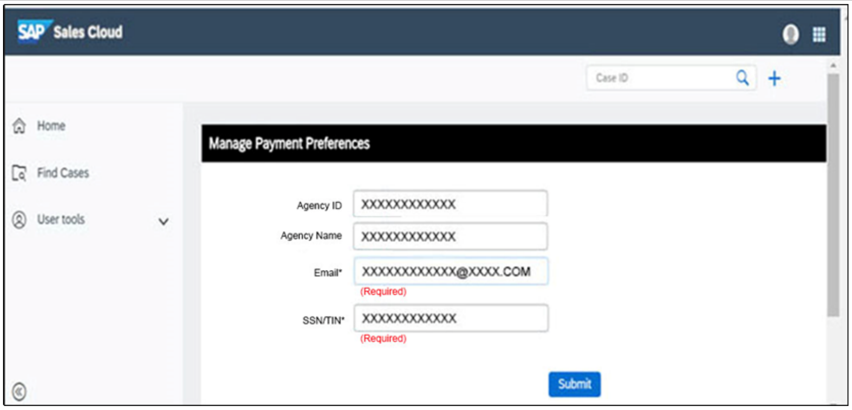
Step 1

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

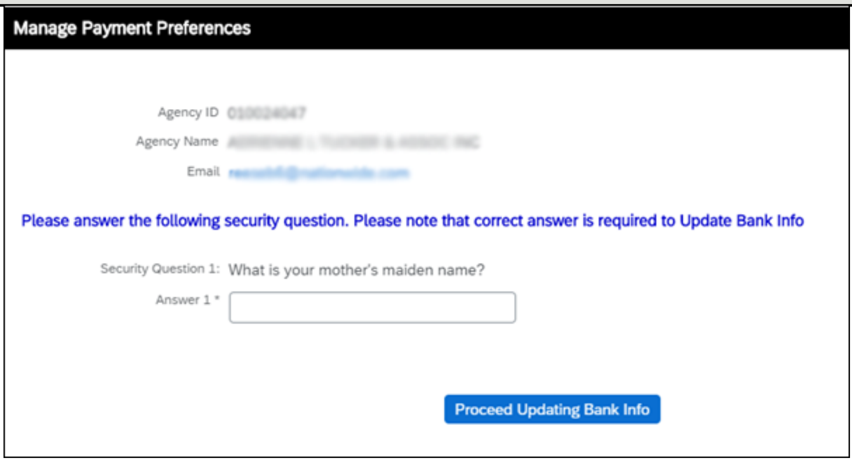
Step 2

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

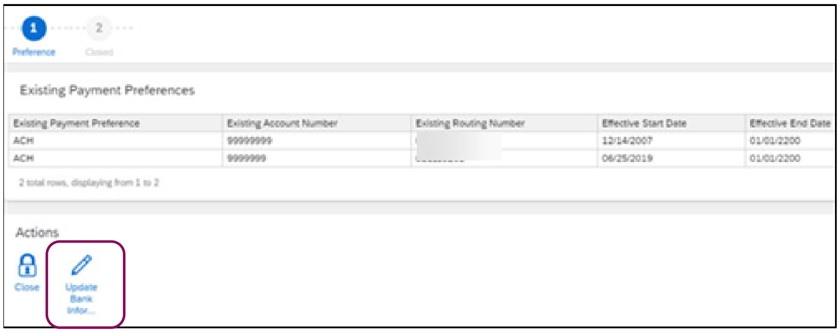
Step 3

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

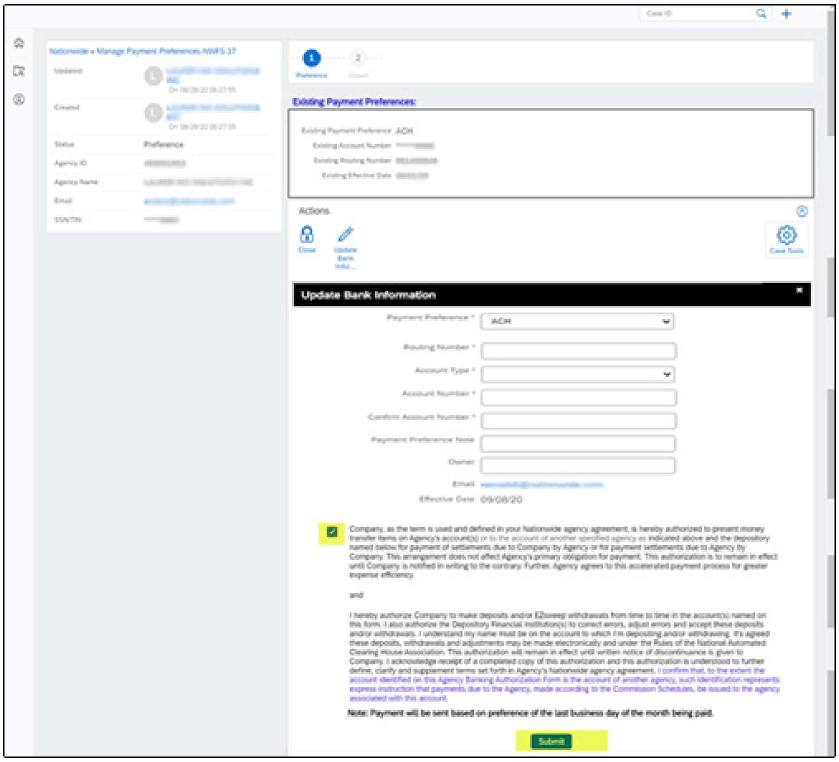
Step 4

Action	Screen
The first time you log in, you will be prompted to set up 2 security questions. ! **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 Once you answer your security question accurately, a note will quickly flash at the top of the screen: ‘Case Successfully Added’	

Step 5

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

Step 6

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

Step 7

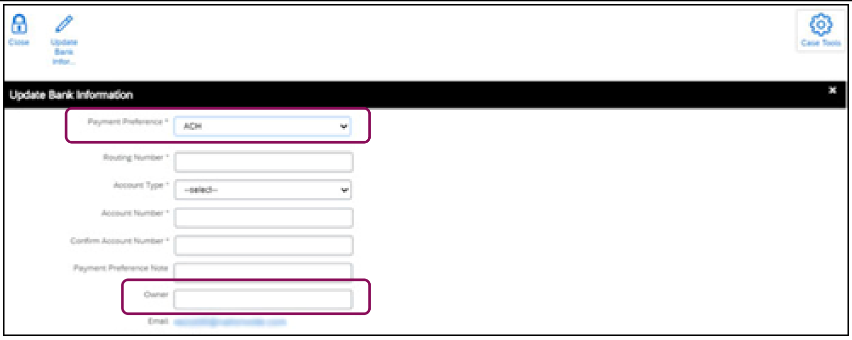
Action

Select ACH in the Payment Preference field.

This will display the additional fields of:
Routing Number
Account Number
Confirmation Number

Note: 'Owner' is the Bank Account Owner Name and is not required.

Screen



Step 8

Action

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.

Once complete, hit the submit button.

The Agency bank Account Details are now updated. You will receive an email confirmation of the update.

Screen