

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

Action	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>	

Sap Sales Cloud

Updating Agency Bank Account Details

Step 2

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

Step 3

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

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>	

Sap Sales Cloud

Updating Agency Bank Account Details



Step 5

Action

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.

Screen

Existing Payment Preference	Existing Account Number	Existing Routing Number	Effective Start Date	Effective End Date
ACH	99999999		12/14/2007	01/01/2200
ACH	99999999		06/25/2019	01/01/2200

Step 6

Action

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.

Screen

Update Bank Information

Payment Preference:

Routing Number:

Account Type:

Account Number:

Confirm Account Number:

Payment Preference Note:

Owner:

Email:

Effective Date: 09/08/20

Company, as the term is used and defined in your Nationwide agency agreement, is hereby authorized to present money transfer items on Agency's account(s) or to the account of another specified agency as indicated above and the depository named below for payment of settlements due to Company by Agency or for payment settlements due to Agency by Company. This arrangement does not affect Agency's primary obligation for payment. This authorization is to remain in effect until Company is notified in writing to the contrary. Further, Agency agrees to this accelerated payment process for greater expense efficiency.

and

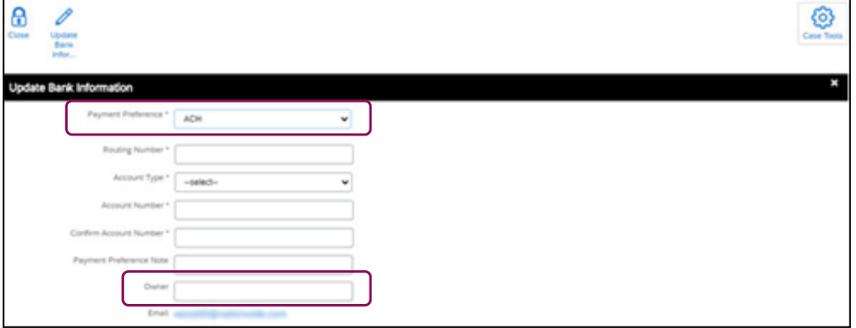
I hereby authorize Company to make deposits and/or (Z) sweep withdrawals from time to time in the account(s) named on this form. I also authorize the Depository Financial Institution(s) to correct errors, adjust errors and accept these deposits and/or withdrawals. I understand my name must be on the account to which I'm depositing and/or withdrawing. I agree these deposits, withdrawals and adjustments may be made electronically and under the Rules of the National Automated Clearing House Association. This authorization will remain in effect until written notice of discontinuance is given to Company. I acknowledge receipt of a completed copy of this authorization and this authorization is understood to further define, clarify and supplement terms set forth in Agency's Nationwide agency agreement. I confirm that, to the extent the account identified on this Agency Banking Authorization Form is the account of another agency, such identification represents express instruction that payments due to the Agency, made according to the Commission Schedules, be issued to the agency associated with this account.

Note: Payment will be sent based on preference of the last business day of the month being paid.

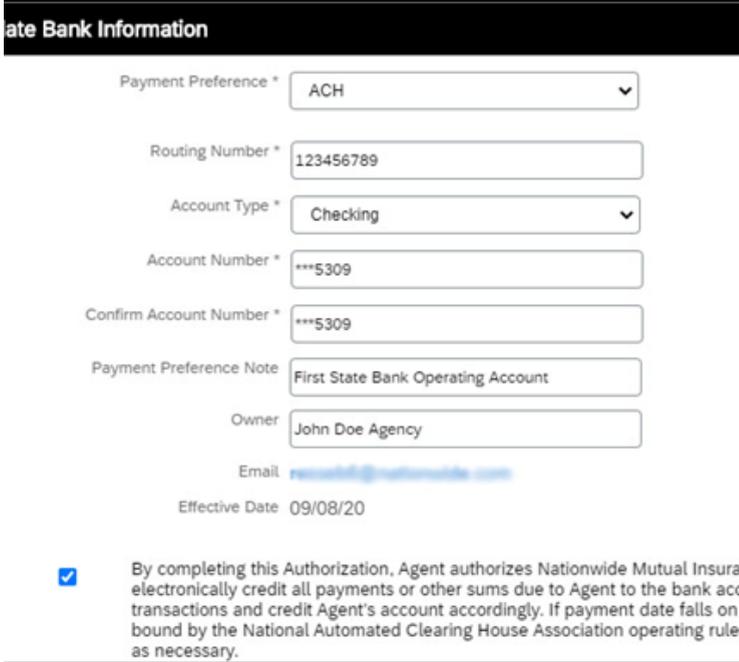
Sap Sales Cloud

Updating Agency Bank Account Details

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>	

By accepting a copy of these materials:

- (1) I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries ("Nationwide"); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor retained by an Independent Sales Agent; or (d) an Independent Adjuster who has a contract with Nationwide; or (e) an employee of or an independent contractor retained by an Independent Adjuster.
- (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.
- (3) I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.
- (4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with Nationwide; (b) my employment with or contract with a Nationwide Independent Sales Agent is terminated; (c) my Independent Adjuster contract with Nationwide is terminated; (d) my employment with or contract with a Nationwide Independent Adjuster is terminated; or (e) my employment or contract with Nationwide is terminated for any reason.