G2G - Manage National Account Preferences for Payments and Titles

Information

Article Number	000005414
Article Type	Procedure
Title	G2G - Manage National Account Preferences for Payments and Titles

Purpose & Scope

Guide to manage National Account payment preferences and title preferences.

Procedure

Payment Preferences

National Account representatives **cannot** update their payment preference on Manheim.com at enhanced locations. The payment is by default set to **next day** check delivery. The check is sent by overnight mail. There is no option to pick up the check at the auction. (**Exception:** **Manheim Texas Hobby** reports that their 4 MIL / National Account checks are sent via **regular mail,** arriving in **5 to 7 business days**).

When a National Account representative requests to have their preference changed, the Client Care Representative should take the following steps:

1. Effective February 2019, the Accounting Department **no longer requires** the client to mail a **void check,** if ACH deposits are their preferred method. Only the completed **ACH Authorization Form** is required. The Accounting Department will reach out to the client to ask for a VOID check only if they encounter problems when validating the bank account.
2. The Client Care Representative must email a copy of the ACH Authorization Form to the client, if they are authorizing ACH transactions. Have them complete it and return via email. Once completed, you will **attach it** to the **SNOW Ticket** that you will be creating through the steps below.
3. Go to the Cox Service Station.
4. Click **Brands**.
5. Click **Inventory Solutions**.
6. Click **Finance - Oracle**.
7. Click **Oracle Customer Request**.
8. Select **Bank Request** from the **Select Type of Request** drop down.
9. Select one of the following options from the **Type of Bank Request** drop-down:

    A. Preference.
    B. New ACH or Check Info for existing account update requests.

10. Type the **Account Name** in the Customer Name field.
11. Type the **4Mil** number in the Customer Number field.

12. Type the **Routing Number**.
13. Type and re-enter the **Bank Account Number**.
14. Type the **Name of the Bank**.
15. **Fill the form** with the payment preference documented:

    A. Enable ACH Credits.
    B. Enable ACH Debits.
    C. Enable ACH Credits and Debits.
    D. Enable Check on Demand.
    E. Update existing ACH bank account.

16. Specify the **Account Type** in the Describe request in more detail field:

    A. Checking.
    B. Savings.

17. Click **Submit**.
18. If there are any questions about this process, you may send an email to: **ClientSetUp@Manheim.com.** A member of the New Business Setup Team will reply to your inquiry.

Client Care should leave the case in progress. The setup team will make the change and close the ticket once the change requested is complete. The CCR must attach the **SNOW case update email** received in Outlook to their Salesforce case then close it.

Title Preferences

National Account representatives **cannot** update their title preference on Manheim.com at enhanced locations. The client can have the preference for titles set by contacting the account sales representative at their home auction. A supervisor in the **Commercial Department** at the auction also can set up the title preferences, as specified by the client. A **SNOW ticket** will be submitted by the auction, which will apply the change to all auction locations.

If Client Care receives a call from the customer, the person should be forwarded to the auction location via a warm transfer for the change to be made. If an auction representative calls in, they should be informed that the SNOW ticket must be initiated by the auction.

Comments

Additional Comments

System Information

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