G2G - Find a Dealer's Payment Preferences

Information

Article Number 000005430

Article Type Procedure

Title G2G - Find a Dealer's Payment Preferences

Purpose & Scope

This article below guides the Client Care agent through the process of **finding a dealer's payment preferences** by running a **report in Workbench**.

(For a guide on how to edit payment preferences in Workbench, please see **Article # 5320, Manage Account Preferences).**

Procedure

Dealer Admins can set and view their payment preferences on their Profile page on Manheim.com.

Client Care can follow the steps documented below to run a report that outlines a dealer's payment preferences.

- Log onto Workbench.
- Click **Menu** on the left.
- Click **Reports**.
- Click **Operational Reports**.
- Click **Customer Payment Preferences**.
- Enter the dealership 5Mil in the **Account Information** field.
- Press **Enter**.
- Double click the **Dealership Name** to select it.
- Click **Run Report**.

The following information will populate if applicable:

- Dealership 5Mil Number and Name.
- The Seller Payment Preferences.
- The Netting Protection / Exemption status. If this field is populated with a **Y**, it means the client is **exempt** from Mandatory Netting / Apply Credits.
- The optional Netting Opt-In status.
- The Collections Hold information.
- The Credit Risk Class.
- The Seller Bank Account Name.
- The last 4 digits of the Seller Bank Account Number.
- The Buyer Bank Account Name.
- The last 4 digits of the Buyer Bank Account Number.
- The Buyer Payment Preferences.
- The Payment Batching.

The Report can be saved or emailed by following these steps:

- Select an option from the **Export** drop-down:
    - Email as attachment.
    - PDF.
    - XLS.
    - CSV.
- Open the downloaded document or fill and send the email form that pops up.

Comments

Additional Comments

System Information

Last Modified Date 6/17/2019 4:13 PM

Last Modified By Christine Carrizales

Created By Amina Niang

Created Date 6/17/2019 4:01 PM

Vicki Article Number KBA-02319-LTBK27

Vicki Date