Manheim, OVE - Add Rep to a National Account, Create Username and Password

Information

Article Number 000005796

Article Type Procedure

Title Manheim, OVE - Add Rep to a National Account, Create Username and Password

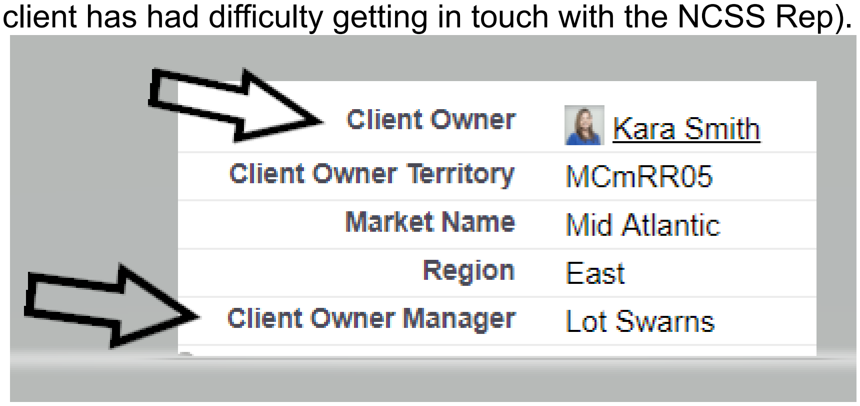
Purpose & Scope

Guide to creating a username and password for National Account Reps and to adding Reps to a National Account. Also, the procedure for changing an address on a National Account.

Procedure

Only Auction employees and NCSS team members (National Client Sales Support - i.e. National Account Sales Reps) **can request** to add a Representative to a National Account. Only the individuals aforementioned can request to provide National Account Representatives with **Post-Sale Management** access and with **Admin** rights on the Manheim website. If a National Account Rep calls requesting to be added to an account, Client Care should refer them to either the Commercial Accounts Department at the facilitating auction or to their NCSS Rep.

The **name of the NCSS Rep** can be found on the **Client Detail page** in Salesforce. To access the page, click on the National account name from within your case. To the right of the Client Detail page, look for the **Client Owner** and, if necessary, **Client Owner Manager.** (The manager may be contacted if the client has had difficulty getting in touch with the NCSS Rep).



Contact information for the individuals will be found by entering the person's name in **Outlook** and clicking on the name. A box will appear that contains their email address and telephone number.

Note: Coordinators must not merge a contact with a 5 MIL number to a 4 MIL record. The system does not allow the addition of a contact with an Auction Access ID to a national account. The settings for national

accounts and dealers' buying accounts are different and merging the records prevents the user from accessing certain account settings.

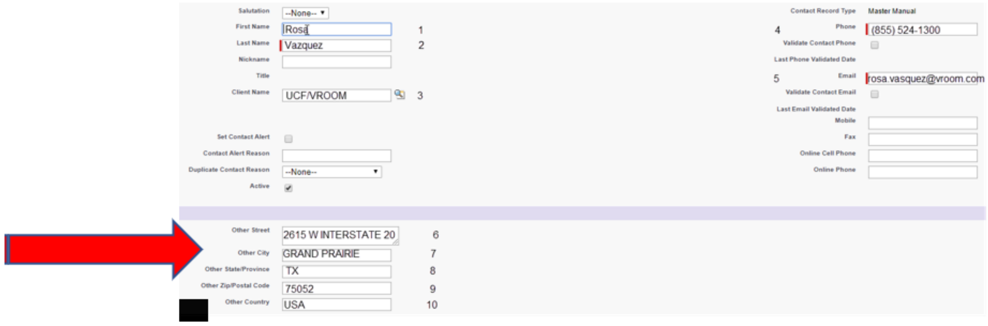
Before creating a new contact record, CCRs should search for the individual by email address, phone number, or first and last name in Salesforce to ensure there isn't an existing one. Follow the steps below to create a new master contact record for **National Account** Reps **who do not already have one***:

1. Go to **Outlook**.
2. Click **New E-mail**.
3. Click on **To**.
4. Type the caller's **Last Name,** a comma then their **First Name**. *(Example: Smith, John)*
5. Once they are located, **verify** that they have an **active role** assigned.
6. Go to the Salesforce **Contacts** tab once the caller is verified.
7. Click **New Contact**.
8. Make sure **Master Manual** is selected.
9. Click **Continue**.
10. Fill all required fields, i.e.:

    A. First Name.
    B. Last Name.
    C. Email address.
    D. Phone number
    E. Address
    F. Type the National Account number in the Client Name field.

11. **National Account** must be selected as the **Online Role** under **Roles & Admin Access. "Other"** must be selected as the **Role** under **Roles & Admin Access.**
12. Click the **Search** icon.
13. Click the **National Account Name**.
14. Click **Save** at the bottom or top of the page.
15. On the profile page, scroll down to the **Contact Username** field.
16. Click **New Contact Username**.
17. Enter the username and password in the appropriate fields**.
18. Click **Save.**
19. Hover over the Rep's first and last name to the right of the Master Contact field. Click **View** to go back to the profile page.
20. Scroll down to the Associated Customer field and click **Associate Customer**.
21. Type the National Account Number in the **Client Name** field.
22. Click the **Search** icon.
23. Click the **National Account Name**.
24. Click **Save*****.

IMPORTANT NOTE: When creating a user name and password for a National account, an **address must be added** as part of the record creation process. (See letter "E" in the list above). If that field is left blank on the **Master Manual** record, the user will not be able to log in to Manheim and or OVE with the credentials created. **OVE.com looks for an address** associated with the contact record. If it does not see one, it is unable to associate the contact to the account.



Existing profiles

*If a National Account Rep who has an **existing profile** needs to be added to a **new account**, the same verification process in **Steps 1-5** applies. Client Care would not need to create a new contact in Salesforce.

1. Search for the caller by **Email Address** or **Phone Number** in Salesforce.
2. Click on the caller's name labeled **Master Contact**.
3. Scroll down to the **Associated Customers** field.
4. Click **Associate Customer**.
5. Type the National Account Number in the **Client Name** field.
6. Click the **Search** icon.
7. Click the **National Account Name**.
8. Click **Save***** to add the account.

Setting permissions for an individual affiliated with a National Account

It is important to remember that individuals affiliated with a **National Account** can receive **Admin privileges** for **G2G Permissions,** but **do not receive Admin privileges for Financial.** This is because an individual associated with a National Account is not making payments for the account. Under **Roles and Administrative Access,** the **Online Role** will be **National Account.** The individual should also be given access to **Manheim.com, OVE.com, Simulcast Everywhere, and Client Reporting.**

If no online role has been set, you will get an error message stating, **"Online Role must be assigned on the related Master Contact and Master Manual records prior to creating a username."** If the online role is not set for a National Account, Salesforce will not allow you to continue to add a username until the online role has been set.

****Guidelines:**

1. Usernames and Passwords must be between **4 and 30 characters** each with no space.
2. Usernames are **not** case sensitive.
3. Usernames **cannot be** an email address.
4. Passwords **are** case-sensitive.
5. Usernames and passwords **cannot** be the same.
6. Username and password values such as password, qwerty... **should not be used**.
7. Usernames and passwords **should not contain** a period (.) or any other special characters like **!@#$%^&*_-.**

***If a Client Care representative receives an **error message** while trying to associate a Rep with a National Account, they should send an email to the NCSS team at NCSSAccountManager@Manheim.com and request to have them added with the following information:

1. The **Subject** line for emails sent to NCSS must be as follows: Need to Add Representative to National Account 4Mil (or number assigned) and Name.
2. Rep's First and Last Name.
3. Rep's Phone Number.
4. Rep's Email Address.

The caller can be copied on the email since they are a Manheim employee.

Comments

NOTES:
To **change an address** on a **National Account**, the case must be e**scalated to Tier 2**, who will send the change to **"OVC"** via a **SNOW Ticket**. The change request must be accompanied by a **completed W-9 form** or it will **not** be processed.

If a representative needs to **remote sell for several different accounts,** the request can be **escalated to Tier 2.** The authorization will be processed via a **bulk request to the Salesforce Team.**

Additional Comments

System Information

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