AS400, Salesforce - National Account 4Mil Creation

Information

Article Number 000005331

Article Type Procedure

Title AS400, Salesforce - National Account 4Mil Creation

Purpose & Scope

This article documents the National Account creation process. It also explains how to deactivate a contact from a National Account.

Procedure

Only Auction employees are authorized to request to have a National Account created in the AS400. If an auction employee needs to have a new National Account created in the AS400, advise them that they need to submit the request via Service Now. They will need a **W9** form for the account before doing so because commercial accounts cannot be created without documentation of the Federal Tax ID number. Also, they must obtain the **legal name of the entity, Federal Tax ID number**, the **full dealership address (no P.O. Boxes),** the **contact name**, and their **email address.** If they have the W9 form that is needed, guide them through the following steps:

- Log into https://coxauto.service-now.com/ess/.
- Click **Technology**.
- Click **Additional Technology Services** on the left.
- Click **Client Data Services**.
- Click **Customer Data Management Request**.
- Select **Create New Commercial Account** from the Type of Request drop-down.
- **Fill** all fields on the form and specify in the **Additional Information** field that the account needs to appear in **Salesforce**.
- **Attach the W-9** form the client.
- Click **Submit**.
- Click **Checkout**.

Once the account is created in the AS400, if the 4Mil is not coming up in the **Salesforce** search, Manheim Client Care must escalate a case to Tier II to have it added after verifying that the account does exist in the AS400.

Comments

Notes:

To **change an address on a National Account, the matter must be **escalated to Tier 2** for processing. Tier 2 will forward the matter to **"OVC"** via a **SNOW Ticket.** A **completed W-9** form must accompany the request or it **will not** be processed.

To **deactivate a contact from a National Account, first verify that the person making the request is an active **Owner** or **Officer** on the account. Since there is no **Auction Access ID** to verify them with, they must verify key pieces of information that only an Owner or Officer can verify -- such as **company address**, **phone number**, or **dealer license number.** Once identification has been established, the coordinator will do the following:

- In Salesforce, **locate the contact** to be deactivated.
- **Locate the account** to be deactivated on the person's contact record.
- If the contact to be deactivated is affiliated with **more than one account**, deactivate only the account requested for removal.
- If the contact is **only associated with one account, deactivate the username** as well to prevent unauthorized access to Manheim.com and OVE.com.

To **close a National Account, escalate the matter to **Tier 2** so that a **SNOW ticket** can be filed. Be sure to include information about **why** the account needs to be closed. The Service Station path for this request will be the same as outlined above. However, in the dropdown for "**Type of Request,"** the requester will select **"Other."**

**See this KB Article to add Reps to a National Account.

Additional Comments

System Information

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