Question: What do I do if a Bulk Permission Request is received?

Answer: Salesforce team can do this in bulk however there is certain information that they need to process the request.

*******Reps must have a Master Manual created before you can add accounts*********

First you will need to access the report via SF to obtain some of the needed information - In Salesforce (under the Manheim Sales console view: select "reports" from the top task bar. When the page refreshes you will see "reports & dashboards.

"Make sure that "all folders" is selected on the left column. in the middle section search for Client ID Report. Select "customize" and then Double click on "client id equals row." Remove the account numbers that are listed in the search and paste the accounts that are being requested. You will have to separate the account numbers by commas to enter them into this field.

***Copy and paste all accounts being request to a notepad or Microsoft word document. Create a string with accounts by putting a comma after every account and then past it to the client id field. Click ok and then click run report at the top of the page. Once the information is displayed select "export details." Select Comma Delimited (.CSV) and click export. Notice the column headers at this point and you only have the following: Client ID, Client Name and Client ID. Refer to the list below to figure out what other information is needed and where to find it.**

Title	Mapping for data load for national accounts

Purpose & Scope

The following is the list of information that is needed with instructions on where to find the info.

First Name = Reps First name exactly as it appears on Master Manual that you are adding Manual Contact records (add column for this field)
Last Name = Reps First name exactly as it appears on Master Manual that you are adding Manual Contact records (add column for this field)
Accountid = client SF id number.

- This is obtained by accessing SF using the Manheim Sales version. Change the view by clicking on the Client Care Console button at the top left of SF and select Manheim Sales
- You will need to select reports and select Client ID Report.

**Copy all of the accounts that the client needs to be added to and past in either Microsoft word or on a notepad note and separate each account number by a comma.

- Select Customize and double click on the client ID equals field, when it opens for editing delete all of the account numbers that are already there and past your string of accounts. Click OK and select "run report"
- Select Export details and select to open via CSV. At this point you have the Client ID, Client Name and Client ID. Change the first column header from Client ID to Account ID.

Sell__c = either Allow or Deny Sell (whichever request is for) Add a column to your existing spreadsheet titled Sell__c and enter the permission that the rep should have for each account.
Financial= either admin or deny (Add a column for this information titled Financial and enter either admin or deny)
G2G_Permissions__c = G2G permission that you want rep to have on Contact records you are loading. (Add a column titled G2G_Permissions__c)
Phone Number = Reps phone number exactly as it appears on Master Manual that you are adding Manual Contact records. (Add a column titled phone number)
Email = reps email address on Master Manual that you are adding Manual Contact records Add a column titled email address (Add a column for email)
Master Contact full ID = salesforce id of master manual contact record (Add a column and title it Master Contact Full ID)

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- Go to the reps SF master contact record and open it. In the URL field you will see a string of numbers this is the Master contact full id information. (ex. 00331000037Q3G0)
- Add a column to your existing spreadsheet titled Master Contact Full ID.

Status__c= yes (this sets the associated contacts that you are adding to active status) Add a column titled Status__c

Below is an example of what your spreadsheet should look like. Save this to your computer and forward the ticket or case to SF team and attach the spreadsheet.

Example Below

First Name	Last Name	accountid	Sell__c	Financial	G2G Permissions	Phone	Email	Master contact full ID	Status_c
Renee	Kandravi	0015000000edKIE	Allow	Admin	ADMIN	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	0015000000ecCrQ	Allow	Admin	ADMIN	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	0015000000ecdvg	Allow	Admin	ADMIN	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	0015000000edKIR	Allow	Admin	ADMIN		renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	001i000001Pvuhr	Allow	Admin	ADMIN	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	0015000000ecOfr	No	Deny	DENY	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes
Renee	Kandravi	0015000000edJZK	Allow	Admin	ADMIN	(804) 747-0422	renee_kandravi@carmax.com	0030Z00003IJv1G	yes

Procedure: Example of correct spread sheet

Account Id	First	Last	Phone	email	Master contact full id	sell__c	G2G_Permissions__
0015000000edKmJ	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edReF	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edUJM	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edKmV	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edKmX	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edEQF	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin
0015000000edKmM	Ashlie	Biddle	(720) 259-7608	ashlie.biddle@sonicautomotive.com	0030Z00003IHf2DQAT	Allow	Admin