Completing the Optional Profit Share Lock-In Agreement

SAP Sales Cloud | Job Aid

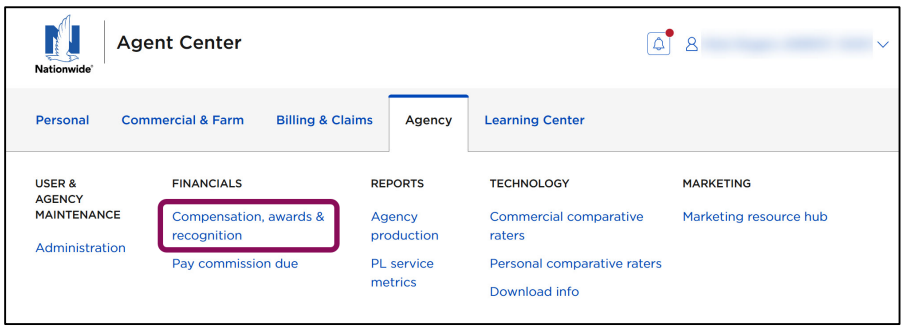
Description

This job aid will demonstrate how you can access your Profit Share Lock-In offer and make your selection within SAP Sales Cloud.

Note: Commercial Lines Profit Share (CLPS) and Farm Lines Profit Share (FLPS) are two separate forms. This means you could be eligible for CLPS Lock-In and/or FLPS Lock-In. If eligible for both, you will have two lock-in offers to accept/decline. Please refer to your Annual Commercial Lines Profit Share Statement and/or Annual Farm Profit Share Statements for September. If a payment amount is shown on your September statement, you are eligible for lock-in for that line of business.

Accessing SAP Sales Cloud

Step 1

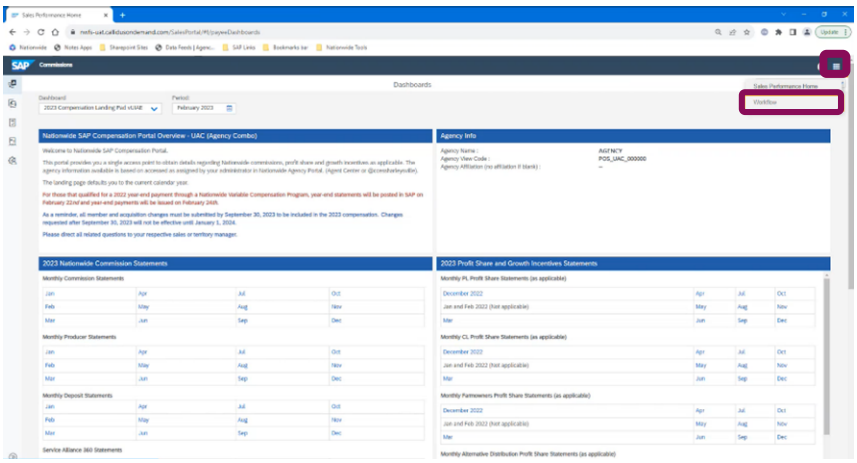
Action	Screen
You can access SAP Sales Cloud using Google Chrome. You can access SAP Sales Cloud from Agent Center by navigating to the “Agency Tab”. Under “Financials” select “Compensation, awards & recognition” and you will be automatically logged in. If selecting "Compensation, awards & recognition" takes you to a sign-in page, and you believe you should have access to SAP Sales Cloud, please contact your Principal or Agency Administrator. SAP is Single Sign On (SSO), no login is required. If you also write Harleysville Policies, then you can access SAP Sales Cloud from @ccessHarleysville by navigating to My Agency Tab > AB & DB Statements. Select the Compensation — 2019 Forward link on the page and you will be automatically logged in.	

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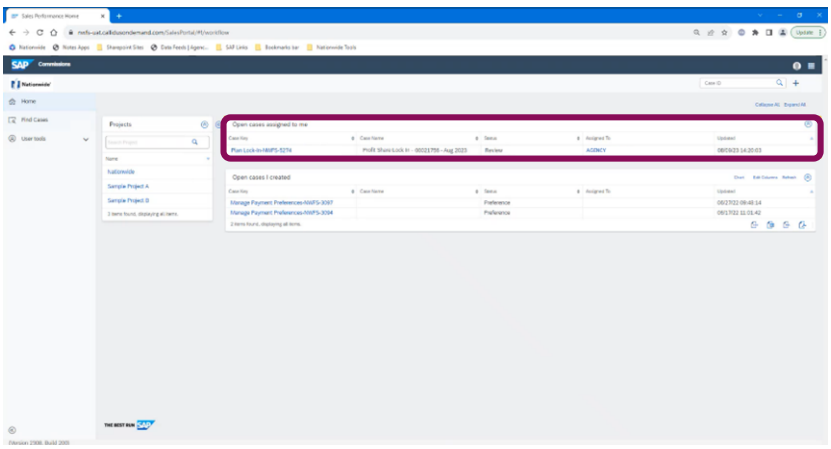
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Accessing the Workflow Module

Step 1

Action	Screen
Navigate to Apps in the upper righthand corner (square box). Select “Workflow” from the drop-down.	

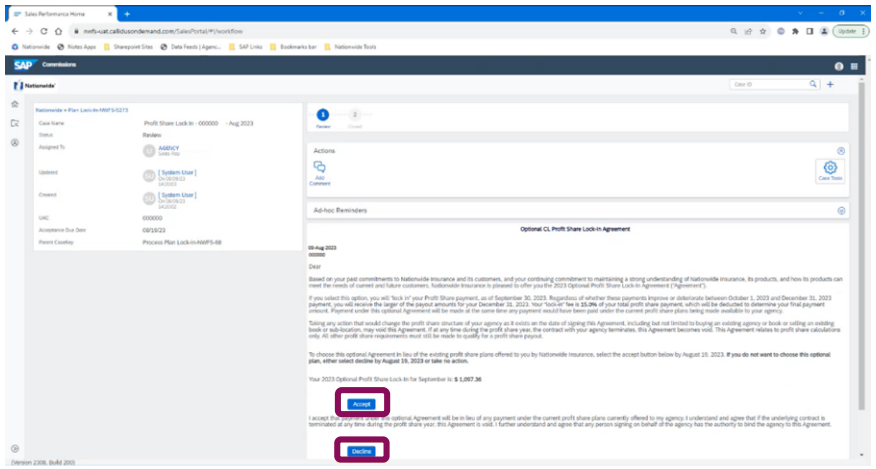
Step 2

Action	Screen
Go to Home and select on open cases assigned to me. **Note:** You could qualify for Commercial Lines Profit Share Lock-In only, Farm Profit Share only or both Commercial Lines Profit Share Lock-In and Farm Profit Share Lock-In. See the 3 scenarios highlighted below. 1. Qualified for Farmowners Lock-In Only: You will only show one lock-in offer for Farm Profit Share Lock-In. **Select on the case** – Farmowners Plan Lock-In and proceed to the next step. 2. Qualified for Commercial Lines Lock-In Only: You will only show one lock-in offer for Commercial Lines Profit Share Lock-In. **Select on the case** – Plan Lock-In and proceed to the next step. 3. Qualified for **BOTH** Commercial Lines Lock-In and Farmowners Lock-In: You will have two separate cases for both lock-in offers - Commercial Lines Profit Share Lock-In and Farmowners Profit Share Lock-In. **Select on both cases,** separately to review both lock-in offers to accept/decline	

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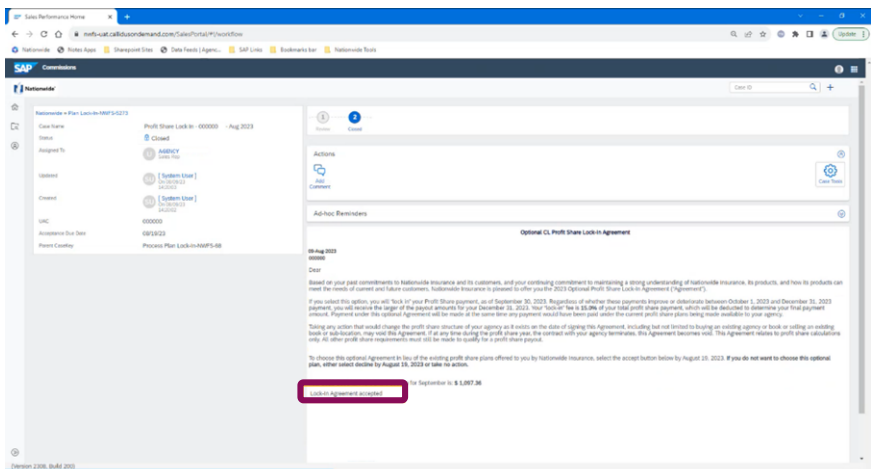
Review Lock-In Offer – Accept/Decline

Step 1

Action	Screen
Once you select on the case, the lock-in offer letter will need to be reviewed and then accepted/declined. The scenarios above outline the possible options. You could have only one lock-in agreement to review or two lock-in agreements to review.	

Lock-In Decision Made

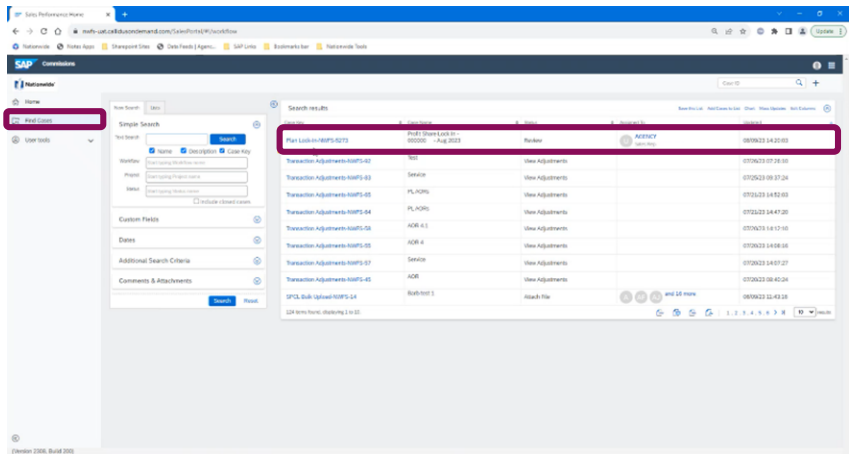
Step 1

Action	Screen
Once the agreement(s) have been accepted or declined, the case will show closed and you can see the status of the lock-in offer at the bottom of the agreement.	

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SAP Sales Cloud – Review Accepted/Declined Lock-In Agreement

Step 1

Action	Screen
Once you have made your selection, you will be able to review the completed agreement. 1. Navigate to Apps in the upper righthand corner (square box) and Select Workflow from the drop-down. 2. Select “Find Cases” on the left side of the page. 3. In the search box, check the box “Include Closed Cases” and then select “Search.” 4. Closed cases should appear in your search results, select the lock-in offer you want to review – PLAN LOCK-IN (CLPS) or FARMOWNERS PROCESS PLAN LOCK-IN. 5. At the bottom of the lock-in agreement, it will show if the offer was accepted or declined and the date it was completed.	

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