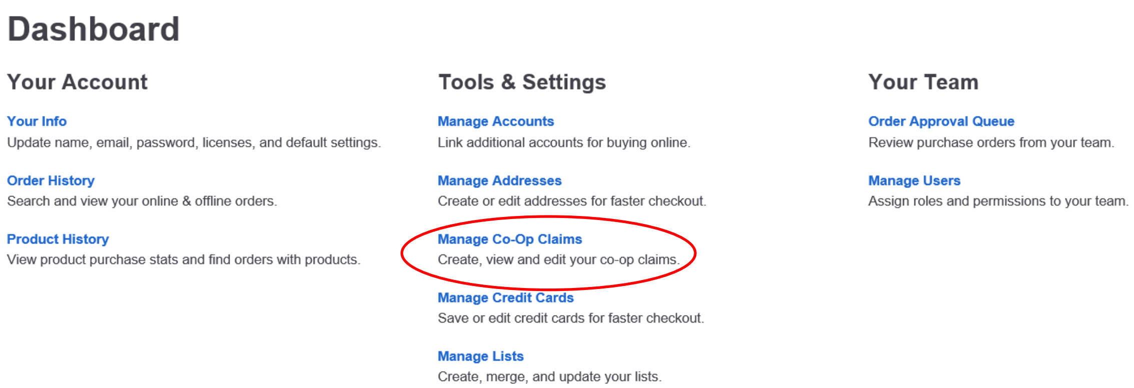
2020 CE Florida
Co-Op Process

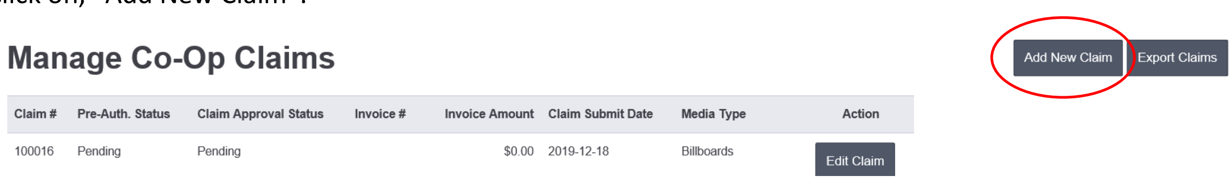
Login @ https://fl.carrierenterprise.com/. Notice the new Manage Co-Op feature in the Dashboard under Tools & Settings:



All users with access to this site will see this new feature. Click on, "Manage Co-Op Claims" to Add & Edit your claims.

<u>Adding a New Claim</u>

Click on, "Add New Claim":



This will lead you to load a Pre-Authorization of Creative Approval and/or a Claim.

It is recommended that Pre-Approval on creative is always submitted to ensure that creative is compliant with the Co-Op Guidelines.

This step will allow you to upload your media and save a claim. Please submit each claim separately for proper tracking and auditing purposes. If you have multiple media files and/or invoices within one claim, you may load them here by clicking on the "Add Additional Media Files" or "Add Additional Invoice Files" buttons. Once complete, click on the "Save Claim" button. An email will be sent to the user logged in that has clicked this button. If you are submitting a claim and creative all at once, this step allows you to load all elements and Claim in one step.

« Manage Co-Op Claims

Add New Co-Op Claim

Claim #: 100064

Account #: 162405   Company Name: SCHMITT, INC

Media Pre-Authorization & Co-Op Approval Authorization

Brand * ☐ Carrier ☐ Bryant

Attach Media: Angie's List   Browse...

(Upload Size: 500 MB Allowed Types: CSV, DOC, DOCX, GIF, JPG, JPEG, MP4, PDF, PNG, XLS, XLSX, ZIP)

Add Additional Media Files

Invoice #

Invoice Date

Invoice Amount

Attach Invoice   Browse...

(Upload Size: 500 MB Allowed Types: CSV, DOC, DOCX, GIF, JPG, JPEG, MP4, PDF, PNG, XLS, XLSX, ZIP)

Add Additional Invoice Files

Comments

Save Claim

Once saved, the Pre-Approval and/or Claim will remain in "Pending" status until it is reviewed:

Manage Co-Op Claims

Claim #	Pre-Auth. Status	Claim Approval Status	Invoice #	Invoice Amount	Approved Amount	Claim Submit Date	Action
100016	Approved	Approved		0		2019-12-23	
100013	Pending	Pending		$1.00		2019-12-17	Edit Claim
100012	Approved	Approved	1	$2,000.00		2019-12-16	
100010	Pending	Pending	115246-cc	$3,650.00		2019-12-16	Edit Claim
100009	Pending	Pending	154789-cc	$2,451.00		2019-12-16	Edit Claim

If you had submitted only a Pre-Authorization, you may Edit Claim to upload remaining elements to allow the claim to be submitted for review.

If your Pre-Approval or claim is Rejected, this is what you will see:

100003	Approved	Rejected	2019-12-16	Edit Claim

Notes explaining the Rejected status will be captured within the claim, when you click, "Edit Claim," you will see CE's Comments, as featured here in an example:

CE Comments   Carrier logo is not featured.

You may address those comments to resubmit your Creative and/or Claim, making necessary adjustments.

Once all elements of this Claim – Creative and Invoices have been approved, this is what you will see:

Manage Co-Op Claims

Claim #	Pre-Auth. Status	Claim Approval Status	Invoice #	Invoice Amount	Approved Amount	Claim Submit Date	Action
100016	Approved	Approved		0		2019-12-23	

You'll notice that no further actions are required, as all elements are approved for this Claim.

Exporting Claims:

For ease of tracking your Claims, you may export your claims by clicking, "Export Claims", as you see here:

Manage Co-Op Claims

Add New Claim | Export Claims

Claim #	Pre-Auth. Status	Claim Approval Status	Invoice #	Invoice Amount	Approved Amount	Claim Submit Date	Action
100016	Approved	Approved		0		2019-12-23	
100013	Pending	Pending		$1.00		2019-12-17	Edit Claim
100012	Approved	Approved	1	$2,000.00		2019-12-16	

Market Funds

Funds Earned $0 | Funds Spent $0

Last updated Jan 2 1970, 12:00 AM

This will export all elements of your Co-Op Claims into a spreadsheet for easy sorting and filtering.

Your market funds will be loaded here, timestamping the latest upload of this data. For your latest Co-Op availability and balance, please contact your CE Account Manager.

Market Funds

Funds Earned $0 | Funds Spent $0

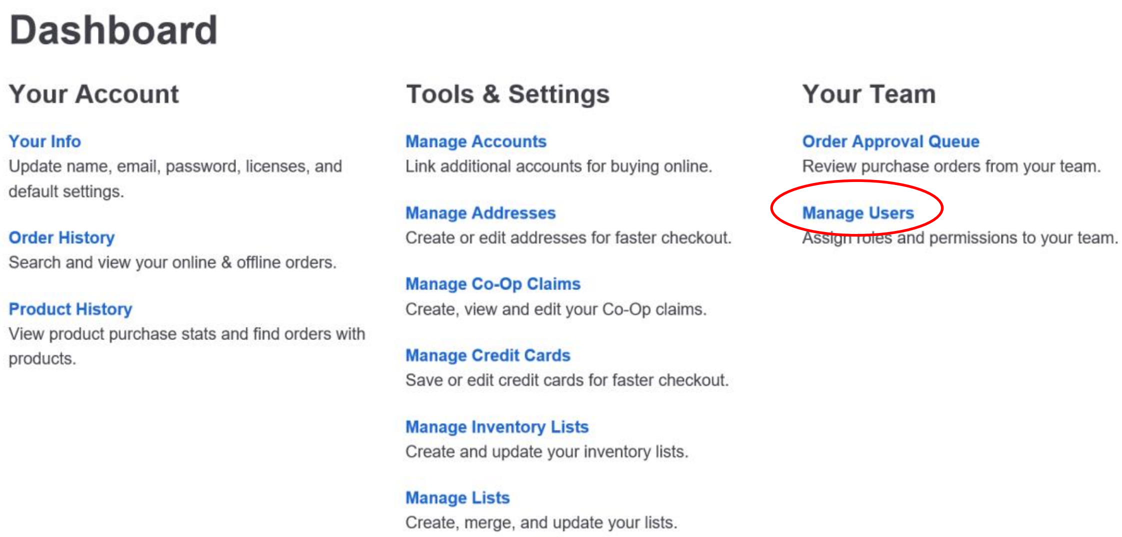
Last updated Jan 2 1970, 12:00 AM

Whenever a Pre-Approval or Claim is submitted, the user logged in will receive an email notification as well, confirming this has in fact been submitted. You can always check the status of any submissions on the account, though, by entering the "Manage Co-Op Claims" link from the dashboard.

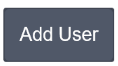
Participation in the 2020 Co-Op Program is based on your distributor and available funds. Although a claim may be approved in the portal as eligible for co-op reimbursements, until funds are earned, reimbursement will not be administered.

Managing Users:

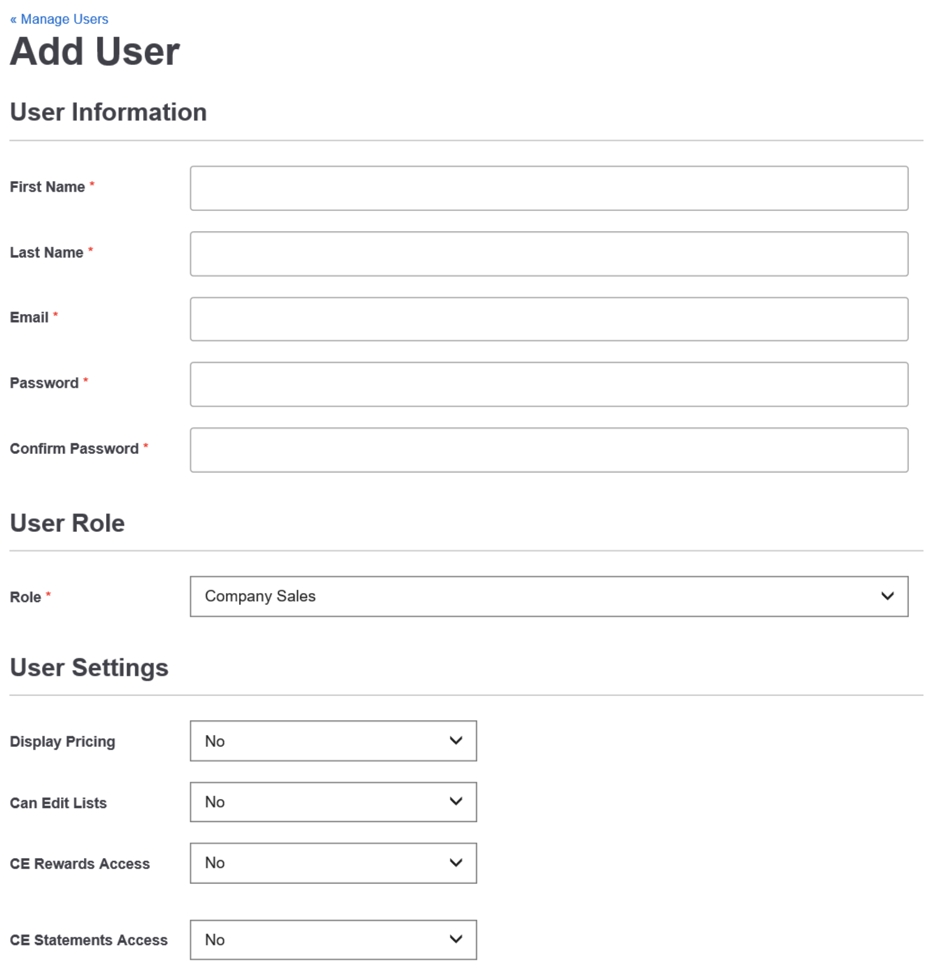
As mentioned previously, all users with access to our site @ https://fl.carrierenterprise.com/ will now have access to the "Manage Co-Op Claims" feature. Some customers may be introducing new users to this site, or even have a third party, such an advertising agency, submit on their behalf. If you so choose, here is how you may add a new user to this account and some permissions/limitations you may put into place that can assist with their access. From your Dashboard, click on "Manage Users", as seen below:



The Administrator on your CE Florida online account is the only individual that can add a user – that Administrator is designated by you and when logged in, they will see this button:



Here are the fields you will see once this button is clicked:



The Role determines the limitations of the user. "Company Manager" gives full access to the site's capabilities. If you select any of the other roles, which are: Company Sales, Company Service, or Company Finance, you will be able to indicate additional settings, that may allow this new user to have access to various functions within the site. If you have any questions on managing users or setting permissions, please feel free to contact Jennifer Corino or Lindsay Danesi at the contact information listed below.

Questions? Local contacts for Co-Op inquiries and status updates include:

Central & North Markets:
Lauren Harrod
Lauren.Harrod@carrierenterprise.com
Office: 407.532.7069

South Market:
Carlene Reydel-Finkelstein
Carlene.Reydel-Finkelstein@carrierenterprise.com
Office: 954.247.2011

West Market:
Donna Pennachiette
Donna.Pennachiette@carrierenterprise.com
Office: 813.242.7762

All Markets – Back-Up/Vacation Support:
Jennifer Corino
Jennifer.Corino@carrierenterprise.com
Office: 407.532.7086

Lindsay Danesi
Lindsay.Danesi@carrierenterprise.com
Office: 407.532.7139