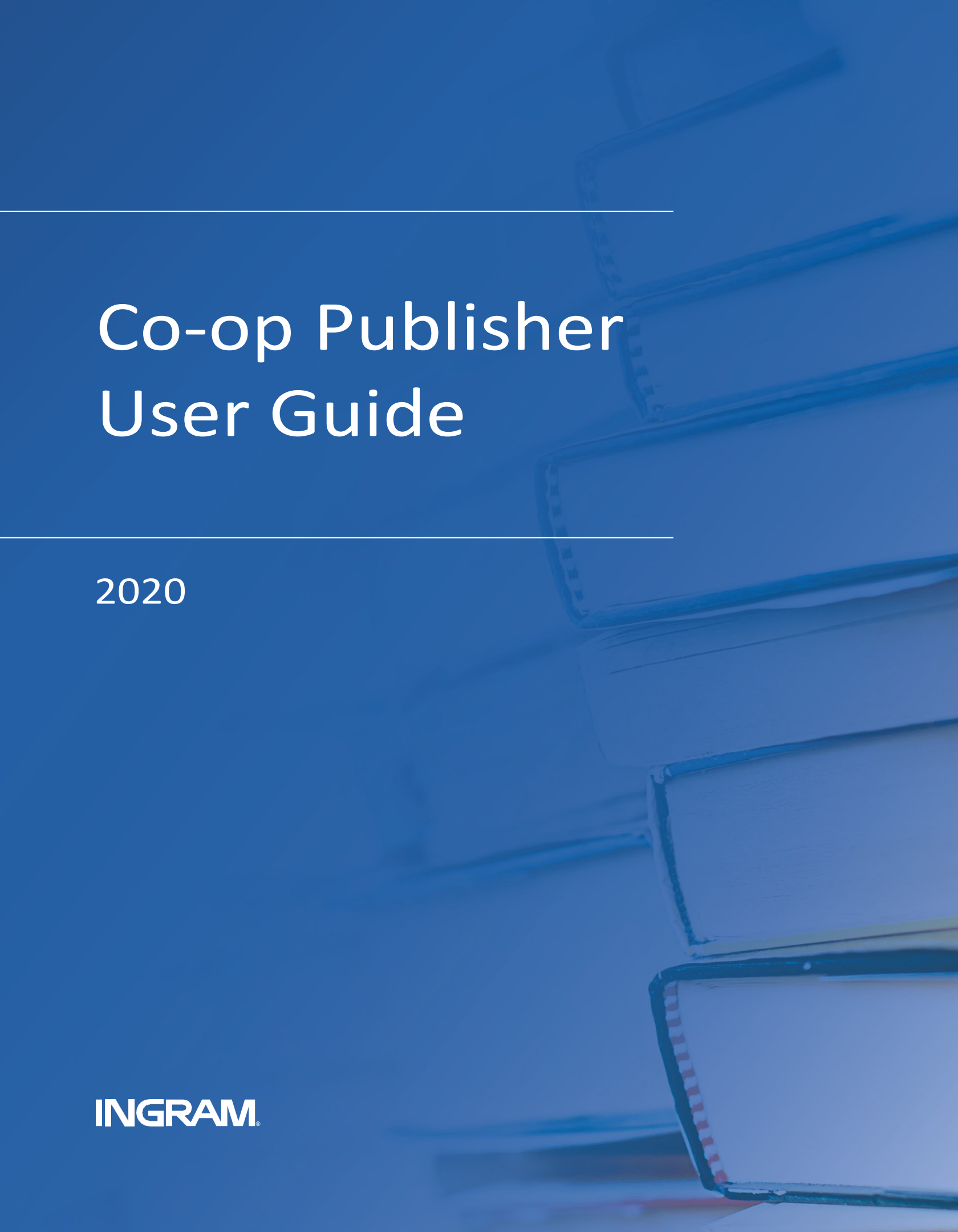

Co-op Publisher User Guide

2020

INGRAM[®]

A stack of several books is visible on the right side of the image, partially obscured by a solid blue overlay that covers the rest of the page. The books have white and red spines, and their pages are visible at the edges of the stack.

Overview

Welcome to Co-op Claims Management, Ingram’s self-service Co-op portal. Co-op Claims Management gives you the ability to easily review, approve and reject all your co-op claims in one convenient location. Here’s a quick overview of everything you can do in Publisher Claims Management. For complete information, check the Site Help content.

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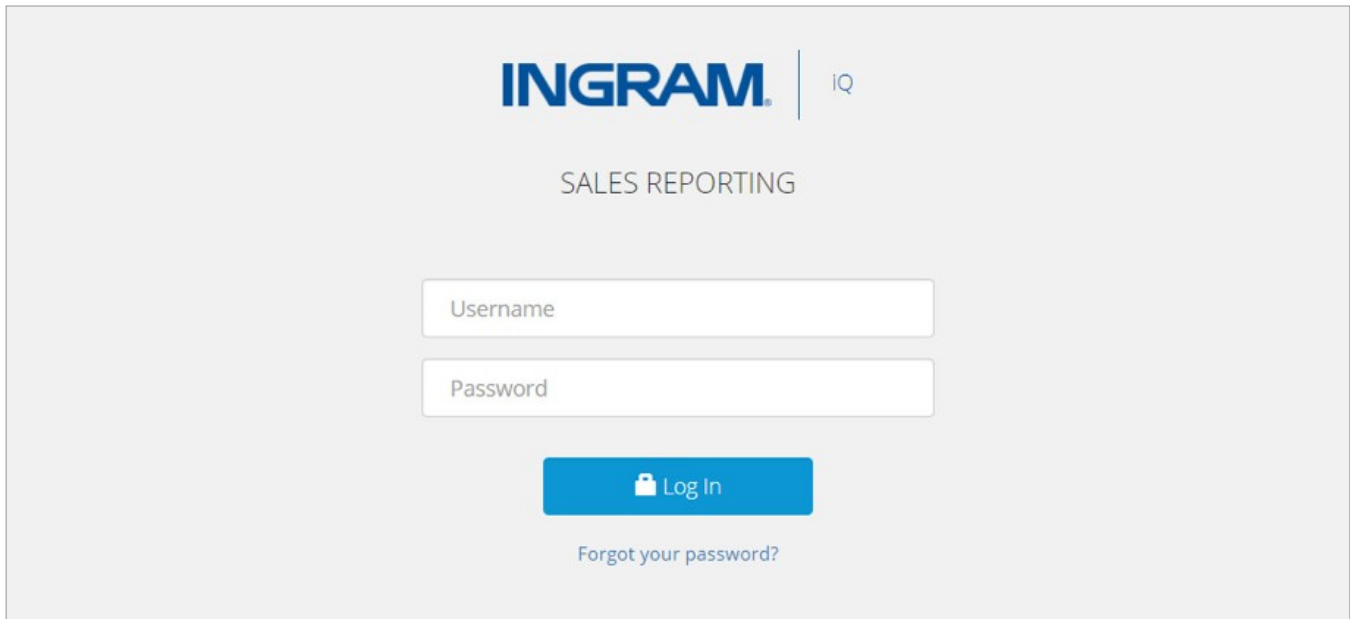
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Logging into iQ

To log into iQ, go to <https://iq.ingramcontent.com/>. Enter your User ID and password on the login page and click the Login button. Your organization's iQ account administrator can create an account for you if necessary.

The screenshot shows the Ingram iQ login interface. At the top, the 'INGRAM' logo is on the left and 'iQ' is on the right, separated by a vertical line. Below this, the text 'SALES REPORTING' is centered. There are two input fields: 'Username' and 'Password'. Below the password field is a blue 'Log In' button with a lock icon. At the bottom, there is a link that says 'Forgot your password?'.

- Remember, your password is case-sensitive. If you've forgotten your password, click the Forgot your password? link and follow the instructions there.
- If you are a brand new iQ user, you will be prompted to accept the Terms & Conditions.
- Upon successful login, your name will appear in the upper right-hand corner.

NOTE: Some functionality is restricted to certain roles and permissions. Please contact your organization's iQ administrator for details.

Navigation to Claims Management

To access the coop portal, select QuickLinks in the top menu bar. Once the page loads, select Retailer Coop under the Additional Resources menu.

The screenshot shows the Ingram Publisher Services dashboard. The top navigation bar includes the Ingram logo, a search bar, and user information. Below this is a secondary menu with links like Home, Sales, Operations, QuickLinks, Ad Hoc, Client Statements, Interactive Client Statements, and Sales Aggregation. The main content area is divided into three columns: Reports, Subscriptions, and Additional Resources. In the Additional Resources column, the 'Retailer Coop' link is highlighted with a red box.

Reports	Subscriptions	Additional Resources
→ Amazon Attempted Order → Best Sellers → Book Shipment Summary → Comparative Sales → Customer Snapshot	→ Account Inquiry → Excess Inventory → Year Supply	→ CoreSource → iPage → LSI → Retailer Coop

The Co-op claims management dashboard screen will appear.

There are two distinct sections of Claims Management:

1. Pending Action – these are pending claims requiring your approval
2. Your Claims History - All claim requests you have worked on that are not pending action by you, the Publisher.

NOTE: Seven years of claims history is available.

The screenshot shows the Co-OP Claims Management dashboard. It has two main sections: 'Pending Action for Publisher' (marked with a red circle 1) and 'All Claims History' (marked with a red circle 2). Both sections display a table of claims with columns for Claim #, Publisher Name, Store Name, Bill To, Variance, Amount, Event End Date, Event Type, Status, Created By, and Created Date.

CLAIM #	PUBLISHER NAME	STORE NAME	BILL TO	VARIANCE	AMOUNT	EVENT END DATE	EVENT TYPE	STATUS	CREATED BY	CREATED DATE
PC3_2	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$8,556.00	07/25/2018	Store Expansion	Pending Publisher Review	Paul Cosman	07/24/2018
PC4_2	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$777.00	07/25/2018	On-line	Pending Publisher Review	Paul Cosman	07/24/2018
susan3_1	O'REILLY MEDIA	Business Beyond Solutions	20V1234	\$0.00	\$324.00	07/25/2018	In-Store	Pending Publisher Review	Susan Trick	07/24/2018
graphic 23	GRAPHIC ARTS BOOKS	News Den	2017749	\$0.00	\$30.00	01/30/2019	Author Appearance	Pending Approval	Mary Jo	01/14/2019
SO-23	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/25/2019	Author Appearance	Pending Publisher Review	Goldstein, Stephanie	02/11/2019
SO-25	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/27/2019	In-Store	Pending Approval	Goldstein, Stephanie	02/13/2019
SO-27	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/28/2019	Author Appearance	Pending Publisher Review	Goldstein, Stephanie	02/13/2019

Claim #	Publisher Name	Store Name	Bill To	Variance	Amount	Event End Date	Event Type	Status	Created by	Created Date
---------	----------------	------------	---------	----------	--------	----------------	------------	--------	------------	--------------

Claims Management Screen

1. The user's name will appear in the upper right-hand corner of the Co-op Claims Management dashboard. Next to the username is a down arrow that will enable you to get to your settings.



2. Settings will determine who can approve your claims. There are three possible choices for settings:
 - a. I would like an Ingram associate to represent me in negotiating and approving co-op request to \$ NO Limit- Selecting this option enables an Ingram Associate to approve ALL claims. This means any dollar amount on any claim.
 - b. I would like an Ingram Associate to represent me in negotiating and approving co-op requests up to x Limit- Selecting this option enables an Ingram Associate to approve claims up to a designated limit that you determine. If you want to approve claims over \$500.00, then set the limit to \$500.00. You still can view all your claims. You will be the one to approve the claims over the amount you set.
 - c. I do not want an Ingram Associate to represent me- This means no Ingram Associate can approve your claims. Only you or your team can approve the claims.

A screenshot of the 'Settings' page. The page has an orange header with the word 'Settings'. Below the header, there is a teal bar with the text 'Publisher: S048 / GRAPHIC ARTS BOOKS'. The main content area contains three radio button options for selecting an Ingram associate to represent the user. The first option is selected. Below the second option, there is a text input field for a dollar limit. A green 'Save' button is at the bottom left of the form.

Settings

Publisher: S048 / GRAPHIC ARTS BOOKS

☒ I would like an Ingram associate to represent me in negotiating and approving co-op requests without a specified dollar limit

☐ I would like an Ingram associate to represent me in negotiating and approving co-op requests with a specified dollar limit

\$ Limit

☐ I do not want Ingram associate to represent me

Save

3. Select the option you want and then click the Save button. You can modify these settings at any time.
4. To navigate back to the Claims dashboard, select the Claims button on the menu bar.

Pending Action

Filtering Claims

The “Pending Action” section will list all claims that need to be reviewed. These claims have either been submitted directly by the retailer or by an Ingram associate on behalf of the retailer. All claims requiring your attention are colored coded in [orange](#).

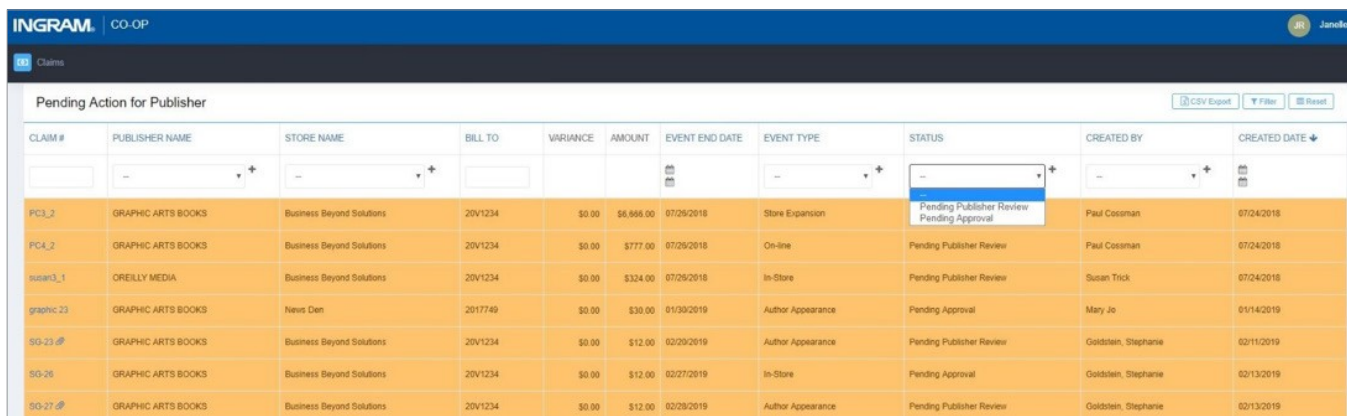
The newest claims will appear first in the queue. Each claim will have a claim #, store name, amount, event end date, event type, status, created by and created date. You can filter on any of these fields or a combination of these fields (except for amount). For example, enter a claim number in the Claim # field and then select the filter button. The co-op application will complete the search and the results are returned if any part of the search criteria is found.

When filtering by store name, event type, status, or created by, a drop-down list will appear for each field with only values that are on the claims within “Your Claims History”. For instance, if you are filtering on the event type field for the event type of “author appearance” and you do not have any claims with that status then it will not appear as an option to select from.

When filtering on the Event End Date or Created Date, select the top calendar icon. This will open a calendar and you can choose the proper date. Selecting the second calendar icon (below the first) enables you to choose a date range. If you do not choose a date range and only select one value, the date range will default to the date selected.

Selecting the Reset button will clear the filters results and show all the data in your queue.

NOTE: it is possible to have a duplicate claim number; however, each one of the duplicates will belong to a different retailer/national account.



CLAIM #	PUBLISHER NAME	STORE NAME	BILL TO	VARIANCE	AMOUNT	EVENT END DATE	EVENT TYPE	STATUS	CREATED BY	CREATED DATE
PC3_2	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$6,866.00	07/29/2018	Store Expansion	Pending Publisher Review	Paul Cosman	07/24/2018
PC4_2	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$777.00	07/29/2018	On-line	Pending Publisher Review	Paul Cosman	07/24/2018
isurak3_1	O'REILLY MEDIA	Business Beyond Solutions	20V1234	\$0.00	\$324.00	07/29/2018	In-Store	Pending Publisher Review	Susan Trick	07/24/2018
graphic23	GRAPHIC ARTS BOOKS	News Den	2017749	\$0.00	\$30.00	01/30/2019	Author Appearance	Pending Approval	Mary Jo	01/14/2019
SG-23	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/20/2019	Author Appearance	Pending Publisher Review	Goldstein, Stephanie	02/11/2019
SG-26	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/27/2019	In-Store	Pending Approval	Goldstein, Stephanie	02/13/2019
SG-27	GRAPHIC ARTS BOOKS	Business Beyond Solutions	20V1234	\$0.00	\$12.00	02/28/2019	Author Appearance	Pending Publisher Review	Goldstein, Stephanie	02/13/2019

There are only two statuses of claims for this queue—**Pending Publisher Review** and **Pending Approval**:

1. Pending Approval is for new claims. All new claims will contain the minimal amount of required information; however, the claims submitter is encouraged to include as much descriptive information as possible to make the request clear. This information can be seen by reviewing all the columns in this “Pending Action” section. You can select the claim number to access the claim. The claim will open so you can review and work the request.

2. Pending Publisher Review is for claims that have been initially approved and the event has occurred. The retailer or Ingram Associated has attached the proof of the event. They are now seeking final approval and payment. Simply select the claim number to work the claim. The claim will open so you can review and work the request.

Pending Approval

Select the Claim # from the Pending Action section to review the claim. Upon selection, the claim will appear.

INGRAM CO-OP

Claims

← BACK TO CLAIMS

Approve Respond to Retailer Decline Print

Claim # susan17 | Created by Mary Jo on June 27, 2018 9:47 AM

Status: PENDING APPROVAL

Claim Details

Publisher: O'REILLY MEDIA	Claim Number: susan17	Store Name: News Den
Contact's Name: Mary Jo	Contact's Email: quality.assurance@ingrambook.com	Contact's Phone Number: United States (615) 555-5555
Event Type: In-Store	Event End Date: 06/11/2018	
Description: N/A	Created On: 06/27/2018	Requested Amount: \$234.00

Upload Documents

Drop files to attach, or browse.

Email_Security_Best_Practices_EN.pdf

Comments

Shushan.Ahmed@ingramco.com
Responded on 06/27/18 09:55 am Please provide an example of what your plan is.

The information about the claim will appear on the screen including: store name, contact information, event type, event end date, unique claim number for the retailer and the requested amount.

If the claim contains an attachment, you can review all attachments by selecting on them one at a time. You will not be able to delete the attachments which have been saved to this claim, but you can attach additional files for the claim. Add additional documentation by either dragging/dropping the files from your computer or selecting the browse button to upload documents.

NOTE: The acceptable file formats are: are jpg, ipeg, gif, png, xls, xlsx, doc, docx, ppt, pptx and pdf.

The Approval History and Comments sections are located at the bottom left corner of the claims screen. Approval History provides a snapshot of activity on the account including: approval of the initial claim, proof being submitted, and acceptance of the proof.

ons are located at the bottom left corner of the claims screen. Approval History provides a snapshot of activity on the account including: approval of the initial claim, proof being submitted, and acceptance of the proof.

Working the claim in pending approval status:

After reviewing the claim, you have three options for working a claim in Pending Approval status.

1. Approve
2. Respond to Retailer
3. Decline

INGRAM CO-OP

Claims

← BACK TO CLAIMS

Approve Respond to Retailer Decline Print

Claim # susan17 | Created by Mary Jo on June 27, 2019 9:47 AM

Status: PENDING APPROVAL

Claim Details

Publisher: OREILLY MEDIA	Claim Number: susan17	Store Name: News Den
Contact's Name: Mary Jo	Contact's Email: quality.assurance@ingrambook.com	Contact's Phone Number: United States (615) 555-5555
Event Type: In-Store	Event End Date: 06/11/2018	
Description: N/A	Created On: 06/27/2018	Requested Amount: \$234.00

Upload Documents

Drop files to attach, or browse.

Email_Security_Best_Practices_EN.pdf

Comments

Shuhan.Ahne@ingramcontent.com
Responded on 06/27/19 09:55 am Please provide an example of what your plan is.

1. Approve - signifies you approve the claim and the amount. Once Approve is selected, you will be prompted with another box.
 - a. You can either accept the approved amount or update it.
 - b. You can choose to add a comment. It is highly recommended that if you update the approved amount, provide a comment as to why the update occurred.

Approve On Behalf

Approved amount On Behalf

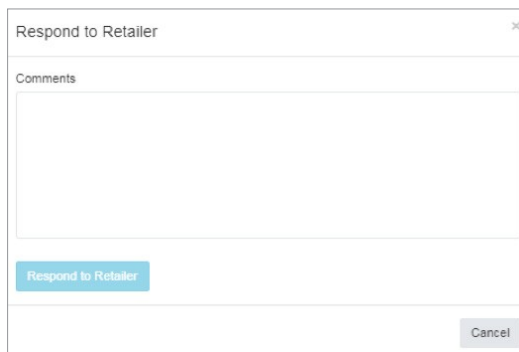
\$12.00

Approver comments

Approve On Behalf

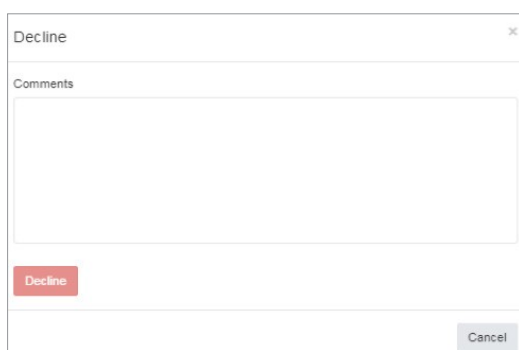
Cancel

- c. The approve button can be selected once all information is populated
 - d. Upon approval, the claim will be removed from your Pending Actions queue and placed back in the retailer's queue. Once the event has occurred, the retailer will attach the appropriate documentation and the claim will be routed back to you for approval.
2. Respond to Retailer- This will enable you to request more information about the claim. Once Respond to Retailer is selected, you will be prompted with another box.
- a. You are required to enter information within the comments box. Once you enter information, the Respond to Retailer button will be activated.
 - b. After you have typed in your response to the retailer, select the Respond to Retailer button. This will place the claim back in the retailer's queue and remove it from your Pending Action queue.



The screenshot shows a dialog box titled "Respond to Retailer" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Comments" with a large text input area. Below the input area, there is a blue button labeled "Respond to Retailer" and a grey button labeled "Cancel" in the bottom right corner.

3. Decline- signifies that you are rejecting this claim.
- a. You are required to enter information within the comments box. Please provide a reason for the decline. Once you enter information, the Decline button will be activated.
 - b. After you have typed in your comments, select the Decline button. This will trigger an email to the creator of the claim stating the claim has been denied.
 - c. The claim will be placed in the **Your Claim History** section. You can go to this claim in your history and choose to accept it later.



The screenshot shows a dialog box titled "Decline" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Comments" with a large text input area. Below the input area, there is a red button labeled "Decline" and a grey button labeled "Cancel" in the bottom right corner.

Pending Publisher Review

Select the Claim # from the Pending Action section to review the claim.

INGRAM CO-OP							
CLAIMS							
CLAIMS							
Pending Action							
CLAIM #	STORE NAME	AMOUNT	EVENT END DATE	EVENT TYPE	STATUS	CREATED BY	CREATED DATE
susan							06/29/2018
susan20	Business Beyond Solutions	\$23,423.00	06/12/2018	On-line	Pending Publisher Review	Mary Jo	06/29/2018
susan21	Business Beyond Solutions	\$23,423.00	06/29/2018	New Store Opening	Pending Approval	Mary Jo	06/29/2018
susan22	Business Beyond Solutions	\$123,219.00	06/12/2018	In-Store	Pending Approval	Mary Jo	06/29/2018
susan23_1	Business Beyond Solutions	\$123.00	06/12/2018	New Store Opening	Pending Approval	Mary Jo	06/29/2018
susan24_1	Business Beyond Solutions	\$0.01	02/19/2018	Catalog	Pending Approval	Mary Jo	06/29/2018
Susan 1_1	Barnes & Noble Inc	\$4.00	06/12/2018	In-Store	Pending Approval	Paul Gosman	06/29/2018
susan 34_1	News Den	\$233.00	06/12/2018	Author Appearance	Pending Publisher Review	Mary Jo	06/29/2018

Upon selection, the claim will appear.

[← BACK TO CLAIMS](#)

[Approve for Payment](#)
[Respond to Retailer](#)
[Print](#)

Claim # susan20 | Created by Mary Jo on June 28, 2018 11:46 AM

Status: PENDING PUBLISHER REVIEW

Claim Details

Publisher: O'REILLY MEDIA

Contact's Name: Mary Jo

Event Type: On-line

Claim Number: susan20

Contact's Email: ebizoncall@ingrambook.com

Event End Date: 06/12/2018

Created On: 06/29/2018

Store Name: Business Beyond Solutions

Contact's Phone Number: United States (368) 548-6528

Requested Amount: \$23,423.00

Approved Amount: \$23,423.00

Description:
N/A

Upload Documents

Drop files to attach, or browse.

☐ Koala.jpg

☐ Hydrangea.jpg

☐ Jellyfish.jpg

☐ Lighthouse.jpg

☐ Koala.jpg

☐ Penguins.jpg

☐ Chrysanthemum.jpg

Comments

Bhushan.Ahne@ingramcontent.com
Approved on 06/29/18 11:50 am Please provide the the dates the on-line event will be advertised.

The information about the claim will appear on the screen including: store name, contact information, event type, event end date, unique claim number for the retailer and the requested amount.

If the claim contains an attachment, you can review all attachments by selecting on them one at a time. You will not be able to delete the attachments which have been saved to this claim, but you can attach additional files for the claim. Add additional documentation by either dragging/dropping the files from your computer or selecting the browse button to upload documents.

NOTE: The acceptable file formats are: are jpg, jpeg, gif, png, xls, xlsx, doc, docx, ppt, pptx and pdf.

The Approval History and Comments sections are located at the bottom left corner of the claims screen. Approval History provides a snapshot of activity on the account including: approval of the initial claim, proof being submitted, and acceptance of the proof.

The Comments sections includes all comments applied to the claim prior to the claim changing status. For each status change, the user's email address, date, time, status and comment are listed. You can get a good idea on the life of this claim from reviewing this information.

Working the claim in Pending Publisher Review:

After reviewing the claim, you have two options for working a claim in Pending Approval status.

1. Approve for Payment
2. Respond to Retailer

Claims

← BACK TO CLAIMS

✓ Approve for Payment ✕ Respond to Retailer Print

Claim # susan20 | Created by Mary Jo on June 28, 2018 11:46 AM

Status: PENDING PUBLISHER REVIEW

Claim Details

Publisher: O'REILLY MEDIA	Claim Number: susan20	Store Name: Business Beyond Solutions
Contact's Name: Mary Jo	Contact's Email: ebizoncall@ingrambook.com	Contact's Phone Number: United States (368) 548-6528
Event Type: On-line	Event End Date: 06/12/2018	
	Created On: 06/28/2018	Requested Amount: \$23,423.00
		Approved Amount: \$23,423.00

Description:
N/A

Upload Documents

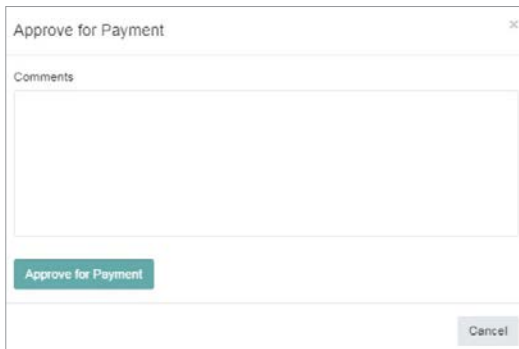
Drop files to attach, or browse.

- Koala.jpg
- Hydrangeas.jpg
- Jellyfish.jpg
- Lighthouse.jpg
- Koala.jpg
- Penguins.jpg
- Chrysanthemum.jpg

Comments

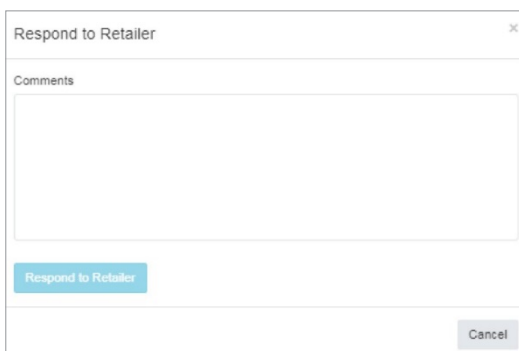
Bhushan Ahire@ingramcontent.com
Approved on 06/28/18 11:50 am Please provide the the dates the on-line event will be advertised.

1. **Approve for Payment**- signifies your final approval for this claim and that it is ready to be paid. Once Approve for payment is selected, you will be prompted with a comments box.
 - a. You can choose to add a comment; however, this is optional.
 - b. Click the Approve for Payment button.
 - c. This will remove the claim from your Pending Actions queue and send it to Billing to be processed.



The screenshot shows a dialog box titled "Approve for Payment" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Comments" with a large, empty text area for input. Below the text area, there is a green button labeled "Approve for Payment" and a grey button labeled "Cancel" in the bottom right corner.

2. **Respond to Retailer**- This will enable you to request more information about the claim. Once Respond to Retailer is selected, you will be prompted with a comments box.
 - a. You are required to enter information within the comments box. Type in a question or comment about the claim. This information will be seen by the retailer. Once information has been entered, the Respond to Retailer button will be activated.
 - b. This will place the claim the retailer's queue and remove it from your Pending Action queue.

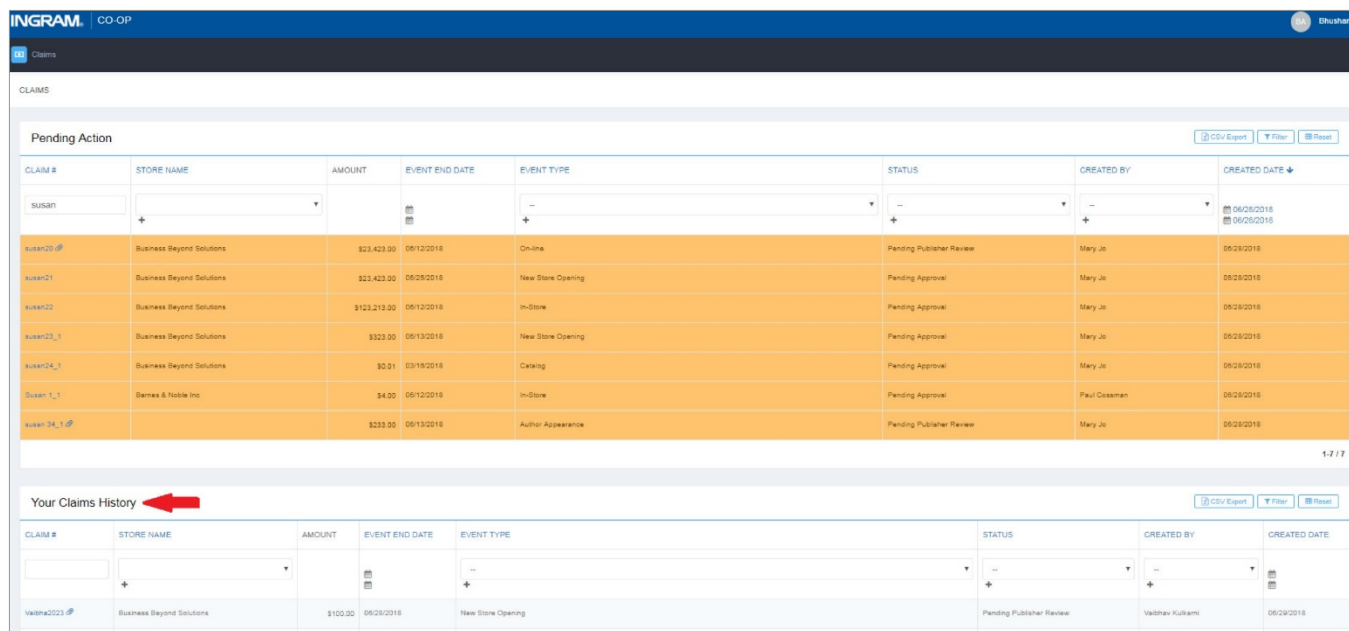


The screenshot shows a dialog box titled "Respond to Retailer" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Comments" with a large, empty text area for input. Below the text area, there is a blue button labeled "Respond to Retailer" and a grey button labeled "Cancel" in the bottom right corner.

Your Claims History

All claims created by you or any claims created on your behalf will appear here – including active claims, paid claims and declined claims. These claims can be new or but may have already been processed. Any claim with the orange background can be updated by you. Select the claim # and work the claim just as you would if the claim was in your Pending Action section.

Each claim will have a claim #, store name, amount, event end date, event type, status, created by and created date. If the claim contains any attachments, a small paperclip icon will appear just to the right of the claim #. You can select the claim number to review and work the claim if necessary.



CLAIM #	STORE NAME	AMOUNT	EVENT END DATE	EVENT TYPE	STATUS	CREATED BY	CREATED DATE
SUBARU							06/26/2018
claim20	Business Beyond Solutions	\$23,423.00	06/12/2018	Online	Pending Publisher Review	Mary Jo	06/26/2018
claim21	Business Beyond Solutions	\$23,423.00	06/26/2018	New Store Opening	Pending Approval	Mary Jo	06/26/2018
claim22	Business Beyond Solutions	\$123,213.00	06/12/2018	In-Store	Pending Approval	Mary Jo	06/26/2018
claim23_1	Business Beyond Solutions	\$323.00	06/13/2018	New Store Opening	Pending Approval	Mary Jo	06/26/2018
claim24_1	Business Beyond Solutions	\$0.01	03/19/2018	Catering	Pending Approval	Mary Jo	06/26/2018
claim 1_1	Barnes & Noble Inc	\$4.00	06/12/2018	In-Store	Pending Approval	Paul Cosman	06/26/2018
claim 34_1		\$233.00	06/13/2018	Author Appearance	Pending Publisher Review	Mary Jo	06/26/2018

CLAIM #	STORE NAME	AMOUNT	EVENT END DATE	EVENT TYPE	STATUS	CREATED BY	CREATED DATE
claim2023	Business Beyond Solutions	\$100.00	06/26/2018	New Store Opening	Pending Publisher Review	Valdine Kulkarni	06/26/2018

The newest claims will appear first in the queue. Each claim will have a claim #, store name, amount, event end date, event type, status, created by and created date. You can filter on any of these fields or a combination of these fields (except for amount). For example, enter a claim number in the Claim # field and then select the filter button. The co-op application will complete the search and the results are returned if any part of the search criteria is found.

When filtering by store name, event type, status, or created by, a drop-down list will appear for each field with only values that are on the claims within **Your Claims History**. For instance, if you are filtering on the event type field for the event type of **author appearance** and you do not have any claims with that status then it will not appear as an option to select from.

When filtering on the Event End Date or Created Date, select the top calendar icon. This will open a calendar and you can choose the proper date. Selecting the second calendar icon (below the first) enables you to choose a date range. If you do not choose a date range and only select one value, the date range will default to the date selected.

Selecting the Reset button will clear the filters results and show all the data in your queue.

NOTE: it is possible to have a duplicate claim number; however, each one of the duplicates will belong to a different retailer/national account.

Statutes

Your Claim History can have various statuses. It is possible to have claims with the following statuses:

New—new claim submitted by the retailer or on the retailer’s behalf

Accepted— claim has been accepted by publisher

Declined- claim has been declined by publisher

Pending Approval- claim is in publisher’s queue waiting for approval

Pending Billing- claim has been approved by publisher and routed to billing department

Pending Credit approval- claim waiting for credit approval

Pending Proof- submitted to the retailer to provide proof of performance after the event occurred

Pending Response- waiting for retailer’s response

Pending Publisher Review- claim is in the publisher’s queue waiting for review

Updating Declined Claims

You can update the approval for all claims with the status of Declined.

The screenshot displays the 'Claims' management interface. At the top, there is a 'Claims' header and a 'BACK TO CLAIMS' button. A red arrow points to the 'Approve' button in the top right corner. Below the header, the claim details are shown for 'Claim # Claim6MAB | Created by Susan Trick on June 15, 2018 10:10 AM'. The status is 'DECLINED'. The claim details are organized into sections: 'Claim Details' (Publisher: O'REILLY MEDIA, Claim Number: Claim6MAB, Store Name: N/A, Contact's Name: Susan Trick, Contact's Email: susan.trick@ingramcontent.com, Event Type: On-line, Event End Date: 05/04/2018, Created On: 06/15/2018, Requested Amount: \$100.00, Description: Website Promo), 'Titles' (EAN: 9781491999509, Title: iPhone: The Missing Manual: The Book That Should Have Been in the Box), and 'Upload Documents' (Drop files to attach, or browse. online_bco_promo.jpg).

You can change the status to approve by selecting the approve button. This will take you through a similar approval process as described on pages 8 and 9.

Approve- signifies you approve claim and the amount. Once Approve is selected, you will be prompted with another box.

- a. You can choose to accept the approved amount, or you can choose to update the amount.
- b. You can choose to add a comment. It is highly recommended that if you updated the approved amount, please provide a comment as to why the update occurred.
- c. The approval button can be selected once all information is populated
- d. Upon approval, the claim will be removed from Declined status in ending Action queue and is sent back to the retailer. Once the event has occurred, the retailer will attach the appropriate documentation and route the claim back to you for approval.
- e. You can choose to cancel your request by selecting on the cancel button.

| Helpful Navigation Tips

Below you will find some basic tips that will be helpful when navigating through the Co-op Claims Management Dashboard

- All optional fields are labeled and are not required to save a co-op claim.
- Selecting the **CSV Export** button will enable you to export all the claims within that section to a CSV file.
- A colored banner showing the status of the claim will appear when reviewing an individual claim.
- The **Filter** button will trigger the search for the data specified by the filter criteria. When a filter is applied, the following message will appear above the filter data: “One of more filters are currently applied so not all claims are currently visible. This will let you know your filter is active. *See how to apply filters in the Pending Action section of this document*”
- The **Reset** button will clear out the filter criteria for the section.
- Anytime you are reviewing a single claim, a **Print** button will appear in the upper right-hand corner of the claim enabling you to print the claim.
- When a claim has a paperclip next to the claim number, it signifies that one or more attachments are present for the claim.

Glossary

Field Name	Description	Type of Field	Mandatory	Notes	Permitted Values
Approved Amount	Amount approved by publisher	Editable	Yes	If the requested amount is not changed, it becomes the approved amount	Dollar amount up to one million dollars
Claim number	Claim # supplied by retailer/national account	Non-editable	Yes	Duplicate claim numbers can exist in this queue but will never occur for the same retailer.	
Contact's email address	Email address of the person who to contract about the claim	Non-editable	Yes	Email address of the person who entered the claim or who the claim was entered on behalf of.	Note – this field is synced with the contact's name
Contact's name	Name of the person to contact about the claim	Non-editable	Yes	Name of the person who entered the claim or who the claim was entered on behalf of.	
Contact's phone number	Phone number of the contact	Phone number format	No	Editable – will default to the last phone number saved	Note - this field will sync with the contact's email address
Created date	Date claim was first created	Date	Yes	System generated	
Description	Free format text	Editable free format text	No	Required when rejecting a claim.	Valid date MM/DD/YYYY
EAN-13 Search	List of EANs/ISBN 13 or ISBN -10	Non-editable	No	Can search for multiple, must provide entire EAN	
Event End date	Date the event will occur	Non-editable	Yes	Start date of the event	
Event type	Type of Co-op event	Non-editable	Yes	if the event type = other, a description will be present	
Publisher Name	Your name	Non-editable	Yes	If the publisher hasn't agreed to coop, they will not be found in the list.	
Requested Amount	Requested claim amount	Editable	Yes		Money format
Store Name	Retailer requesting the claim	Non-editable	Yes		N/A
Upload Documents	Place to attach any document related to this claim	**Can open and view documents. ** can add ** cannot delete	No	Area where you drop documents, more than one document is permitted	any document type of jpg, jpeg, igf, png, xls, xlsx, doc, docx, ppt, pptx or pdf

Contact Us

All questions about Co-op claims can be sent to coopadmin@ingramcontent.com

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