

2013 CO-OP CLAIMING PROCESS

Once the Freedom planning has been initiated, customer has made forecasted selections in Freedom Options buckets, and have started accumulating points, please follow these steps to ensure co-op reimbursement via credit on CE Northeast/Homans' account is made in a timely manner.

To ensure quick approval and processing please send all dealer made ads, scripts and proofs to Campbell-Ewald for pre-approval

Via e-Mail: bryantcoop@c-e.com or carriercoop@c-e.com

Via Fax: 877-234-7542

Or

Mail to:

Campbell-Ewald Trade Marketing

30400 Van Dyke Ave

Warren, MI 48093

For Co-Op approvals, rejections or questions please call 586-753-8665.

Your TM will be happy to help guide you through the new system.

Step by step Process:

1. Log onto www.mycarriertoolbox.com or www.mybryanttoolbox.com and click on Freedom Points program at Dealer home page
2. 2013 Freedom Points will be displayed showing Actual YTD points accrued VS. Planned total for 2013 points

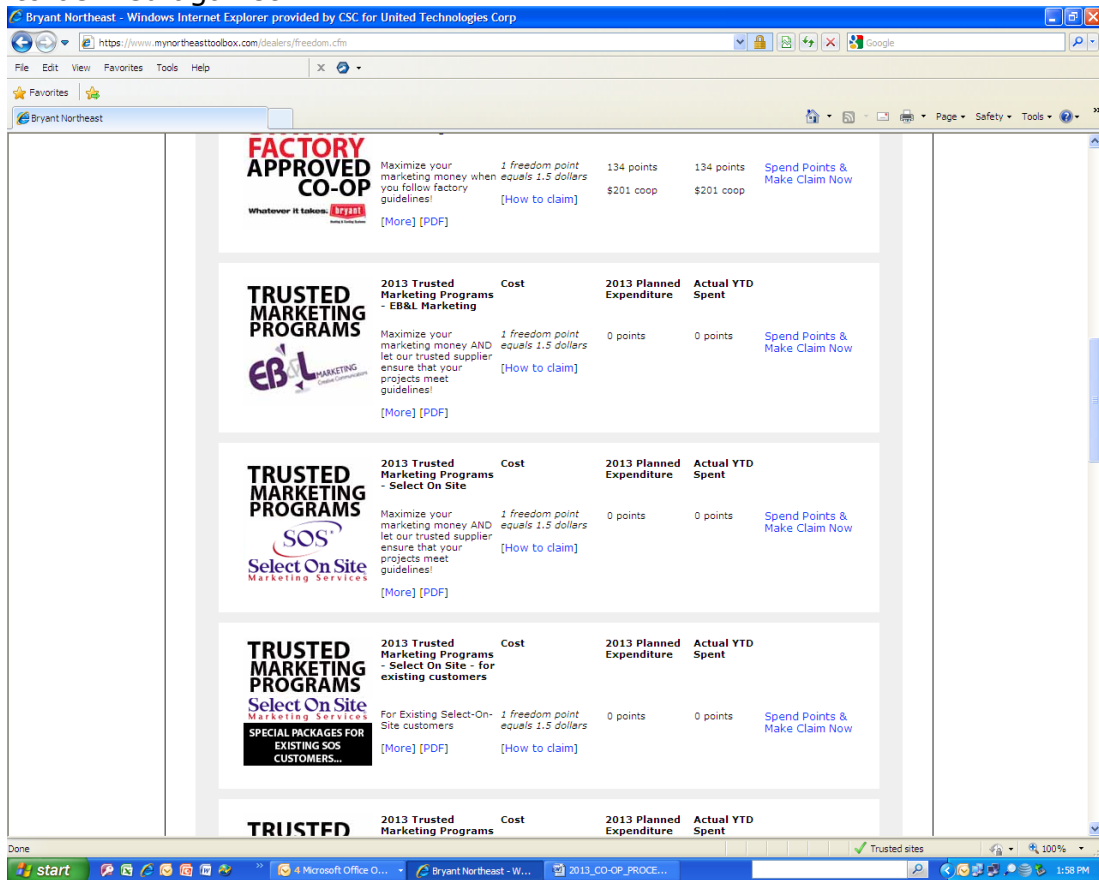
The screenshot displays the 'Customer Toolbox' website interface. At the top, there are logos for CE Northeast and HOMANS. The main content area is titled '2013 Freedom Points' and includes sections for 'Freedom Points Allocations' and 'Freedom Options'. The 'Freedom Options' section shows a table with 'Actual YTD' and 'Planned Total for 2013' values.

	Actual YTD	Planned Total for 2013
Points Earned	0	0
Points to Goal	0	0

	Actual YTD	Planned Total for 2013
Points Earned	0	1,459
Points Spent	801	
Points Available	-801	

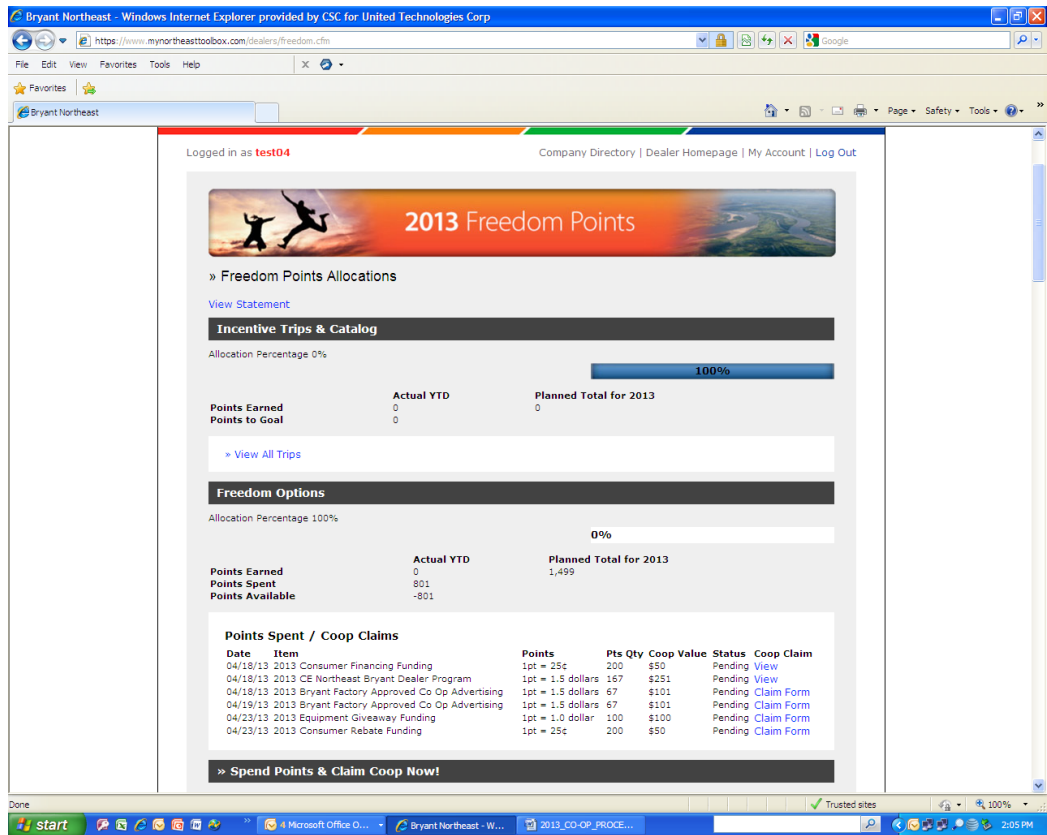
Below the tables, there is a section for 'Points Spent / Coop Claims' with columns for Date, Item, Points, Pts Qty, Coop Value, Status, and Coop Claim.

- Under “**Spend Points & Claim Coop Now!**” select the bucket corresponding to the expense to be filed against.



If 2013 CE Northeast Bryant or Carrier Program:

- Click on the hyperlink on “Spend Points & Make Claim Now”
- Enter co-op amount you expect to receive. The credit amount can be any amount smaller but never greater than 50% of invoice total.
- Fill in brief description including invoice number and vendor
- Click USE POINTS box to submit. This will generate an e-mail notification to customer, market administrator and TM
- Under Freedom Options (top of page) Points Spent/Coop Claims, the claim just submitted will be listed with Date, Item description, Points Qty allocated and Value (Credit requested).
- Click on Claim form hyperlink to open a new screen with Customer name and account number. Under claims enter brief description of claim, Invoice #, notes and invoice amount.
- Use browse function to select an electronic copy of invoice **or** click on Send attachments by fax to send a hard copy of invoice. Add comments if necessary and submit.
- A message will be sent to market administrator and TM.



- A new message on screen will notify you that your co-op claim has been submitted. If fax was selected, a download/print Fax Cover sheet message will display.
- Fill out form and fax to market administrator along with copy of invoice.

Once these steps are taken, customer will now see a link to *View* co-op claim rather than *claim form*.

If 2013 Factory Approved Co-Op Advertising, Trusted Marketing programs (EB&L, Select on Site, MARC USA, Hudson Ink, Angie's List, Brickyard, Right On Interactive) and Equipment Giveaway Funding:

- Customer clicks the hyperlink on "Spend Points & Make Claim Now.
- Enter co-op amount to be received. The dollar amount will automatically populate the points to be used. The credit amount can be any amount lower but never greater than 50% of invoice total (50% or 40% are the rates according to factory guidelines published on HVACPartners in factory ad kits or Campbell-Ewald claim form)
- Fill in brief description including invoice number and vendor
- Click USE POINTS box to submit. This will generate an e-mail notification to dealer, market administrator and TM
- Under Freedom Options (top of the screen), Points Spent/Coop Claims, the claim just submitted will be listed on the screen with Date, Item description, Points Qty allocated and Value (Credit requested).
- Click on Claim form to open a Campbell-Ewald claim form. Please print or save your computer documents, fill out and forward such along with invoice copy and proper back-up to Campbell-Ewald for processing

Once these steps are taken, customer will now see a link to *View* co-op claim rather than *claim form*.

If 2013 FAD Training Fees, Customer Rebate funding or Customer Financing funding:

- Customer clicks the hyperlink on "Spend Points & Make Claim Now"
- Enter co-op amount to be received. The dollar amount will automatically populate the points to be used. The credit amount can be any amount lower but never greater than 50% of invoice total.
- Click USE POINTS box to submit. This will generate an e-mail notification to dealer, market administrator and TM
- Under Freedom Options: Points Spent/Coop Claims, the claim just submitted will be listed on the screen with Date, Item description, Points Qty allocated and Value (Credit requested).
- Click on Claim form hyperlink to open a new screen with Customer name and account number. Under claims enter brief description of claim, Invoice #, notes and invoice amount.

» Coop Claim Form

Dealer Information (if you need to make changes go to My Account)

Company Name:

Account Number:

E-mail:

Freedom Option Information

Option: 2013 Consumer Rebate Funding

Coop Amount: \$50.00

Points: 200

Claims

Description	Invoice	Optional Text	Invoice Amount	Approved Claim Amount <small>Office Use Only</small>
1. <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
4. <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
5. <input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

[\[Add another line\]](#)

Total:

- Use browse function to select an electronic copy of invoice **or** click on Send attachments by fax to send a hard copy of invoice. Add comments if necessary and submit.
- A message will be sent to market administrator and TM.
- A new message on your screen will show that a co-op claim has been submitted. If fax was selected, a download/print Fax Cover sheet message will display.
- Fill out form and fax to market administrator along with copy of invoice.

Once these steps are taken, customer will now see a link to *View co-op claim* rather than *claim form*.