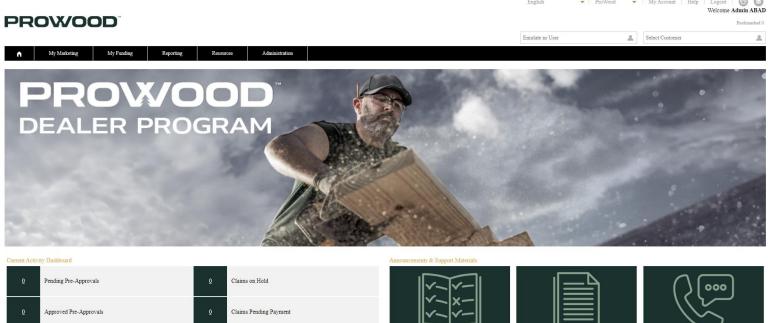


# Welcome to the ProWood Dealer Co-op Program

QUICK REFERENCE GUIDE



Web Site Privacy Notice Browser Compatibility

- Login
- · Homepage Dashboard
- Account Overview Funds
- Account Overview Pre-Approvals
- Account Overview Claims
- Create Pre-Approval
- Pre-Approval Inquiry
- · Resubmit Held Pre-Approval
- · Submit Claim for Payment
- Claim Inquiry
- Resubmit Held Claim



Monday-Friday, 8:30 a.m. ET – 5:00 p.m. ET, excluding holidays

Email: ProWood@email-360insights.com

Phone: 1





# PROWOOD

Welcome to the Marketing Tools and Funds Portal

1	User ID*
	User ID
	Password*
	Password
2	Forgot Your Password?

Login

If you are a vendor accessing this site for the first time please contact the dealership you are working with so they can grant you access to set up a user ID and password.

#### CONFIDENTIAL AND TRADE SECRET DATA

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Item	Description
1.	The User ID is the email address associated with your account.
2.	Please select the "Forgot Your Password" link to create your password
3.	Email with a temporary password and instructions on how to reset your password will be sent to the email address associated with your account.



Phone: 1

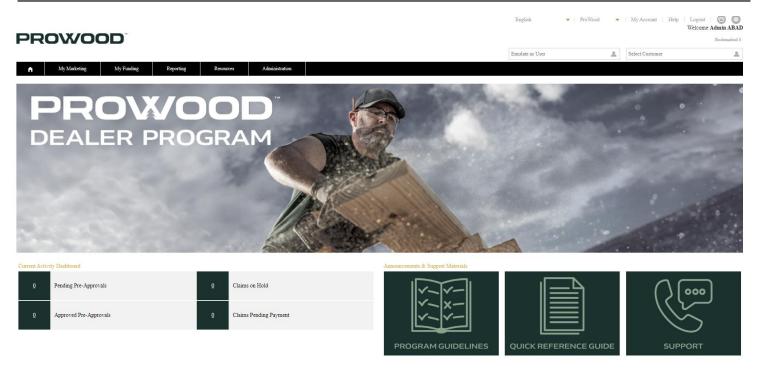
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Email: Panasonic.ca@email-360insights.com





# Homepage Dashboard



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Item	Description
1.	Used to navigate to different sections of the portal such as Create Pre-Approval, Submit Claim, Account Overview, Resources, etc.
2.	Quick access to view current Claims or Pre-Approvals in various stages of the approval cycle.
3.	Links to frequently used support items such as MDF program guidelines, user guide, and platform support.

Contact

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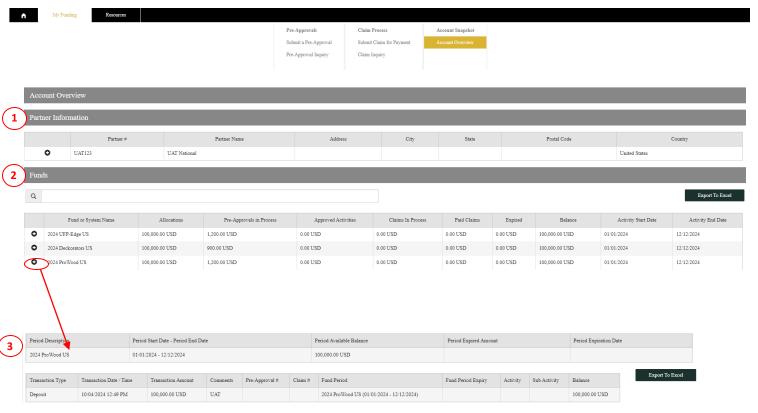






## **Account Overview Funds**

• Account overview is available under My Funding > Account Snapshot > Account Overview.



Item	Name	Description
1.	Partner Information	View Partner#, name, and address. Select "+" icon to view more details including Partner contact information.
2.	Funds	<ul> <li>View total allocations &amp; balances by fund name.</li> <li>Selectthe "+" icon to expand the fund and see period descriptions and transaction history, including transaction type, date, amount, etc.</li> <li>Allocations - the total amount of all transactions made against that fund.</li> <li>Prior Approvals In Process - shows Prior Approvals currently in process.</li> <li>Approved Activities - approved Prior Approvals.</li> <li>Claims in Process - value of all Claims that have been submitted and approved, and in the queue to be paid.</li> <li>Paid Claims - value of all Claims that have already been paid.</li> <li>Expired - fund amounts not used at the end of the period.</li> <li>Balance - remaining balance of the fund. Shows "0" for budget funds.</li> <li>Activity Start/End Date - fund duration and expiry date. Period for activities to be submitted.</li> </ul>
3	Fund details	Detailed breakdown of fund periods, deposits/invites, transactions, etc.



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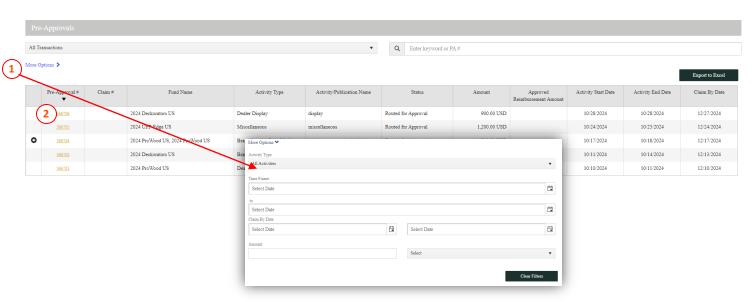






# **Account Overview Pre-Approvals**

Submitted and processed Pre-Approvals are available under Pre-Approvals in Account Overview.



Item	Name	Description
1.	More Options	Select more options for advanced search filter on activities, time frame, amount, etc.
2.	Pre-Approval #	Select the Pre-Approval# link to display additional details. Select the '+' icon to the left to view multiple activities submitted on one PA.
	Claim #	Submitted Claim# that is associated with the Pre-Approval. Select the Claim# link to display additional details.
	Fund Name	Fund name that is reserved for the Pre-Approval.
	Activity Type	Activity type selected from the available media types.
	Activity Name	Short description.
	Status	<ul> <li>Status of the Pre-Approval:</li> <li>Submitted: Activity submitted, not yet approved.</li> <li>Approved: Activity approved and can be Claimed for payment.</li> <li>Hold: Activity on hold; additional information/documents required.</li> <li>Re-Process: The held PA was edited and resubmitted.</li> <li>Denied: Activity denied.</li> <li>Claimed for Payment: Claim, associated with the Prior Approval, has been submitted.</li> <li>Mixed Status: The PA has multiple activities; each activity has different statuses. Select the '+' icon on the left to view the activity status.</li> </ul>
	Amount	Amount requested.
	Approved Reimbursement Amount	Amount approved.
	Activity Start Date & End Date	Activity period – start date and end date.
	Claim by Date	Associated with the Prior Approval Claim submission deadline.
3.	Export to Excel	Select "Export to Excel" to export the data to an excel file.

Contact

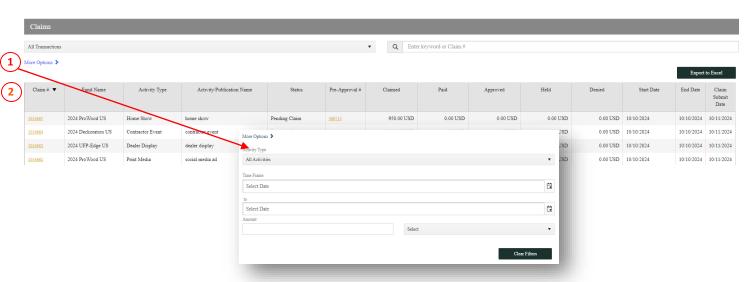
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# **Account Overview** Claims

• Submitted and processed Claims are available under Claims in Account Overview.



Item	Name	Description
1.	More Options	Select more options for advanced search filter on activities, time frame, amount.
2.	Claim #	Select the Claim # link to display additional details.
	Fund Name	Fund name that is reserved for the activity.
	Activity Type	Activity type selected from the available media types.
	Activity Name	Short description.
	Status	<ul> <li>Status of the Claim:</li> <li>Pending Claim: submitted, not yet processed.</li> <li>Approved Claim: approved for payment within the next payment run.</li> <li>Held for Documents: Activity on hold; additional information/documents required.</li> <li>Denied: Activity denied.</li> </ul>
	Prior Approval #	Approved Pre-Approval# that is associated with the Claim. Select the Claim# link to display additional details.
	Claimed	Amount requested for payment as per approved Pre-Approval.
	Paid	Amount approved for payment.
	Approved	Amount approved in processing, not yet approved for payment.
	Held	Amount on hold due to missing documents/incomplete information.
	Denied	Amount denied for payment.
	Start Date & End Date	Activity period – start date and end date.
	Claim Submit Date	Claim submission date.
3.	Export to Excel	Select "Export to Excel" to export the data to an excel file.

Contact

Phone: 1

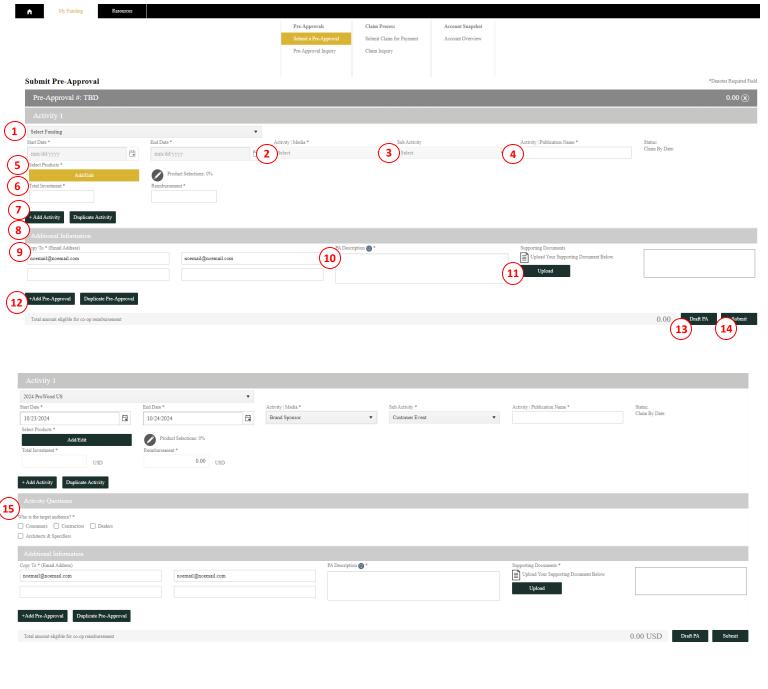
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# **Create Pre-Approval**

- To submit a Pre-Approval, select My Funding > Submit a Pre-Approval.
- Enter the information requested. Required fields are noted with red asterisk. See next page for details.
- Utilize 'Draft PA' as the page will timeout after 20 minutes of in activity.
- The submitted Pre-Approval is routed to the assigned Approvers for review and approval.
- If the activity qualifies, the Pre-Approval will be approved; the funds reserved will be available to Claim for reimbursement.



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Monday-Friday, 8:30 a.m. ET - 5:00 p.m. ET, excluding holidays







Item	Name	Description
1	Start   End Date	<ul> <li>The Start Date must be in the future and represents the date your activity will take place. Pre-Approvals must be submitted for approval at least 3 business days prior to commencement of the activity.</li> <li>The End Date represents the date your activity is complete. End Date controls the Claim submission deadline and must be equal or greater than the Start Date.</li> </ul>
2	Activity   Media	Activity as per the Program Guidelines. Select from the available activities in the dropdown list.
3	Sub Activity	Sub - activity as per the Program Guidelines. Select from the available activities in the dropdown list.
4	Activity   Publication Name	Short description of the activity. For example, Branded Media advertising, Digital Campaigns, etc
5	Select Products	Select one or multiple products that are represented in the marketing activity.
6	Estimated Total Investment	Enter total investment amount that is expected to be spent to execute the marketing activity. Reimbursement amount is auto calculated (%) as per the Program Guidelines.
7	Add Activity   Duplicate Activity	Select to add multiple activities to one Pre-Approval or select to copy the content of the above entry. Copied entry is editable.
8	Additional Information	Additional information for the the selected activity. Fields marked with asterisk are mandatory.
9	Сору То	Emails that are listed receive system generated notifications about the status of the request. Email of the submitter is pre-filled. Additional email addresses can be added to receive these system generated notifications.
10	PA Description	Include key Pre-Approval details such as the description of activity and additional comments to support the requested activity.
11	Supporting Documents (if applicable)	Upload documentation to support the requested activity. This may include quarterly marketing plan, draft agenda, draft creative, etc.
12	Add Pre-Approval   Duplicate Pre-Approval	Select to add multiple Pre-Approvals at one time or select to copy the content of the above entry. Copied entry is editable. Used when submitting multiple requests during a single session that require minor updates or edits.
13	Draft PA	Select Draft PA to save draft and return to complete later. The page will time out after 20 minutes of inactivity.
14	Submit	Select Submit to submit the PA for approval. Prior Approval will go through the system approval workflow.
15	Activity Questions	Additional question(s) relating to the selected activity.

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Email: ProWood@email-360insights.com

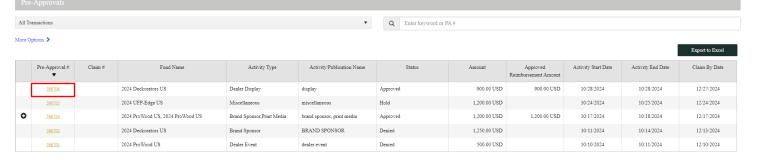




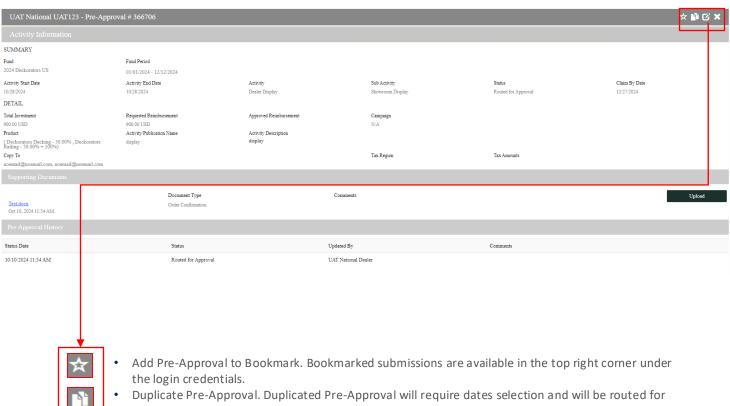
# **Pre-Approval Inquiry**



- A list of submitted Pre-Approvals will be shown, including statuses, amounts, dates, etc.
- To access the details of the specific Pre-Approval, select the unique ID



#### Pre-Approval Details



- review (status is not duplicated).
- Edit Pre-Approval, only for not processed Pre-Approvals. If Pre-Approval has been approved or the Claim has been submitted against the Pre-Approval, editing is no longer possible.
- Cancel Pre-Approval. Reason for cancellation will be required. If the Claim has been submitted against the Pre-Approval, cancelling is no longer possible.



Phone: 1

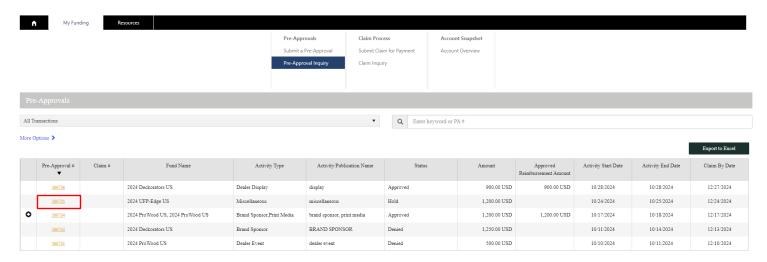
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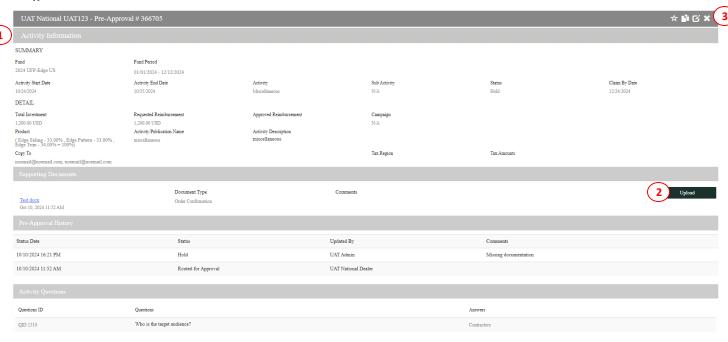


# **Resubmit Held Pre-Approval**

To resubmit a Pre-Approval that is placed on hold, choose My Funding > Pre-Approval Inquiry, and select the Pre- Approval #.



#### Pre-Approval Details



Item	Description
1.	<b>Pre-Approval history</b> used to review Prior Approval cycle information, including status, status date, submitter/processer name, comments. Review the Hold comment to proceed with the Pre-Approval update.
2.	If additional documents are requested, navigate to the Upload button to upload requested documents. Once documents are uploaded, Pre-Approval is automatically routed for re-processing. No further action required.
3.	To edit the Pre-Approval information, select the editicon. Once the Pre-Approval is updated, select Submit. Pre-Approval automatically routed for re-processing.  To cancel the Pre-Approval, select the 'X' icon. Enter cancellation comment, select Save.

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Monday-Friday, 8:30 a.m. ET - 5:00 p.m. ET, excluding holidays

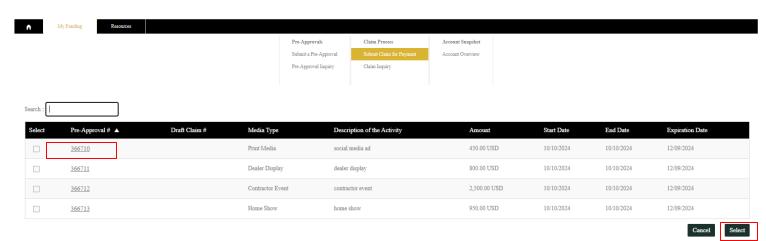


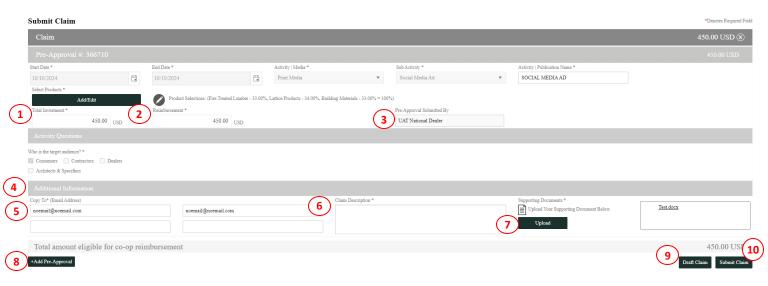




# **Submit Claim for Payment**

- A Claim can be submitted based on an associated approved Pre-Approval. Claims can be submitted only after the end date of the Pre-Approval is in the past and within 90 days of the activity end date.
- To submit a Claim, select My Funding > Submit Claim. Select the check box for the Pre-Approval # to be submitted, and then Select.
- Enter the information requested. Required fields are noted with a red asterisk. See next page for Helpful Hints and additional information.







Monday-Friday, 8:30 a.m. ET - 5:00 p.m. ET, excluding holidays





Item	Name	Description
1.	Estimated Total Investment	Claimed amount prefilled from the approved reimbursement amount of the Prior Approval.
2.	Estimated Reimbursement	Auto calculated (%) reimbursement amount as per the Program Guidelines.
3.	Pre-Approval Submitted By	First and last name of the user who submitted associated the Prior Approval.
4.	Additional Information (if applicable)	Questions populate based on the selected activity. Questions marked with asterisk are mandatory.
5.	Сору То	Emails that are listed receive system generated notifications about the status of the Claim. Email of the submitter is pre-filled. Additional email addresses can be added to receive these system generated notifications.
6.	Claim Description	Includes key activity details such as the description of activity, invoice #'s associated with the expense(s) submitted, and/or additional comments to support the Claim.
7.	Supporting Documents	Upload documentation to support the requested reimbursement. This includes proof of performance (POP) as defined in the Program Guidelines. List of POP required for reimbursement documentation per selected activity is available in the upload window. Documents submitted in the Prior Approval are available for preview in the upload window.
8.	Add Pre-Approval	To add multiple Claims at one time. Use when submitting multiple Claims based on the approved Pre-Approvals during a single session.
9.	Draft Claim	Select Draft Claim to save draft and return to complete later.
10.	Submit Claim	Select to Submit Claim for payment. Claim will go through the system approval workflow. Confirmation of Claim entry and a unique Claim # are displayed on screen.





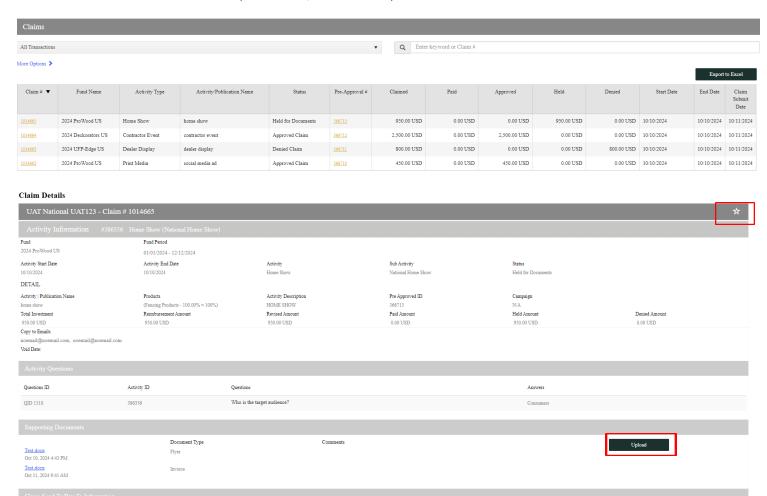
# **Claim Inquiry**



Submitted Claims are available under My Funding > Claim Inquiry.



- A list of submitted Claims will be shown, including statuses, amounts, dates, etc.
- To access the details of a specific Claim, select the unique ID.





- Bookmark Claim. Bookmarked submissions are available in the top right comer under the login credentials.
- $Claims\ with\ the\ status\ "Action\ Required",\ require\ additional\ documentation.\ Submitthe\ document\ via\ the\ "Upload"\ and\ additional\ document\ and\ additional\ document\ and\ additional\ additional\$ function. Once the document is saved, Claim is automatically sent for review.

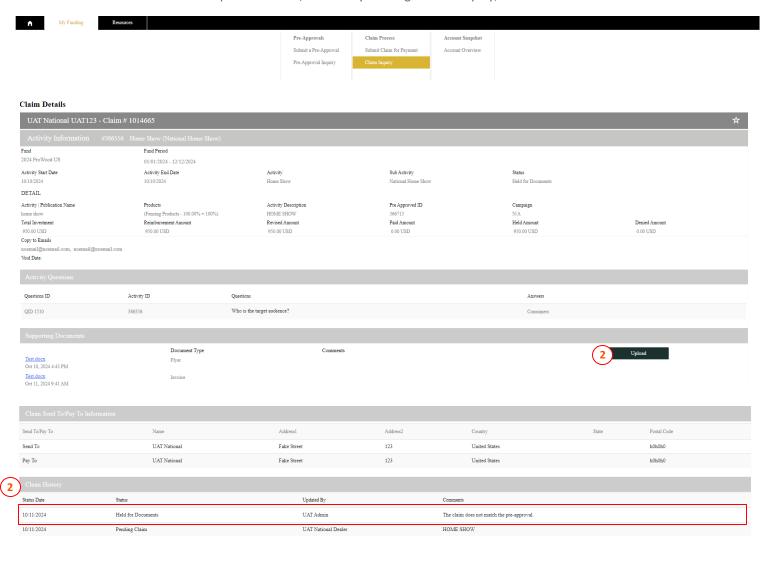
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## **Resubmit Held Claim**

To resubmit a Claim that is placed on hold, choose My Funding > Claim Inquiry, and select the Claim #.



Item	Description
1.	<b>Claim History</b> used to review Claim cycle information, including status, status date, submitter/processer name, comments. Review the Hold comment proceed with the Claim update.
2.	To upload additional documents/information, navigate to the Upload button to upload requested documents. Once documents are uploaded, Claim is automatically routed for re-processing. No further action required.



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