

TABLE OF CONTENTS

Annual Collateral Allocations 2

Collateral Requests..... 3

 View Collateral Request..... 3

NAVIGATOR COLLATERAL REQUEST OVERVIEW

NAVIGATOR COLLATERAL REQUESTS

This document outlines all features and functions available to viewing Annual Collateral Allocations and Collateral Requests in the Certification Portal.

ANNUAL COLLATERAL ALLOCATIONS

The Primary or Authorized Contact listed on the Entity can view Collateral Requests on behalf of the Entity assigned Annual Collateral Allocations. Your allocations can be viewed from the My Entity page.

- 1. The My Entity page will display the Total Allocation and the Allocation Spent

The screenshot shows the 'My Entity' page for 'Acme Inc.' with the following details:

- Account:** Acme Inc. (Buttons: + Follow, Edit, View Website)
- Program Type:** Navigator Organization
- Primary Phone Number:** 111-222-3333
- Website Address:** acme.inc
- Primary Location Address:** 123 Test Ave., Sacramento, CA, 95834

Entity Information:

Account Name: Acme Inc.	Entity Status: Active
Parent Account:	Program Type: Navigator Organization
Business Legal Name: Acme Inc.	Primary Email Address: navtest@acme.inc
Website Address: acme.inc	Primary Phone Number: 111-222-3333
Category: Profit	Secondary Phone Number:

Annual Collateral Allocations (1)

ANNUAL ...	ACTIVE ALL...	TOTAL ALL...	ALLOCATIO...
ACA-00...	<input checked="" type="checkbox"/>	\$1,500.00	\$99.95

Buttons: **More detail** (highlighted), View All

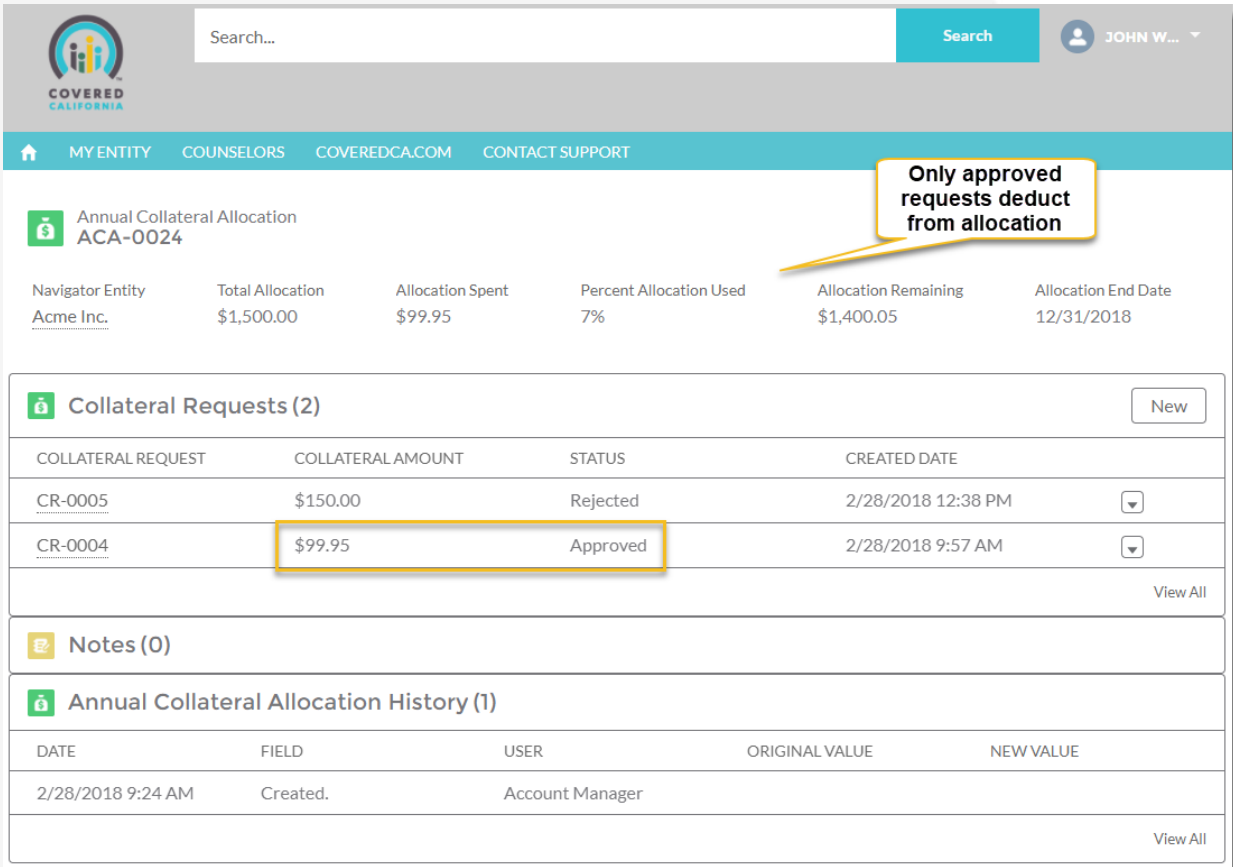
NAVIGATOR COLLATERAL REQUEST OVERVIEW

COLLATERAL REQUESTS

Collateral Requests are created and submitted from by your Account Manager from an active Annual Collateral Allocation.

VIEW COLLATERAL REQUEST

1. Select an active Annual Collateral Allocation record and review the allocation details.



Only approved requests deduct from allocation


Navigator Entity	Total Allocation	Allocation Spent	Percent Allocation Used	Allocation Remaining	Allocation End Date
Acme Inc.	\$1,500.00	\$99.95	7%	\$1,400.05	12/31/2018

COLLATERAL REQUEST	COLLATERAL AMOUNT	STATUS	CREATED DATE
CR-0005	\$150.00	Rejected	2/28/2018 12:38 PM
CR-0004	\$99.95	Approved	2/28/2018 9:57 AM

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
2/28/2018 9:24 AM	Created.	Account Manager		

2. Click on a Collateral Request to view its details.

NAVIGATOR COLLATERAL REQUEST OVERVIEW



Search
🔔
👤 JOHN W...

🏠 MY ENTITY
👤 COUNSELORS
🌐 COVEREDCA.COM
📞 CONTACT SUPPORT

Collateral Request
CR-0012

Navigator Entity	Available Allocation
Acme Inc.	\$1,300.10

Collateral Request
CR-0012

Collateral Allocation
ACA-0024

Description ⓘ
Example request for advertising materials

Created By
Account Manager, 4/13/2018 10:11 AM

Collateral Amount
\$99.95

Status
Approved

Last Modified By
Account Manager, 4/13/2018 1

Collateral Request Items (2)

ITEM NAME	PRICE	QUANTITY	TOTAL PRICE	
Marketing Pamphlet	\$0.50	100	\$50.00	▼
Entity Poster	\$49.95	1	\$49.95	▼

[View All](#)

Sum of Collateral Request Items

Approved requests have deducted the Collateral Amount from the Available Allocation field