Collateral and Sales Tools Management for Enrollers Task Guide

Overview

The Collateral and Sales Tools Request feature gives enrollers a single place to request Covered California marketing collateral and sales tools for their locations.

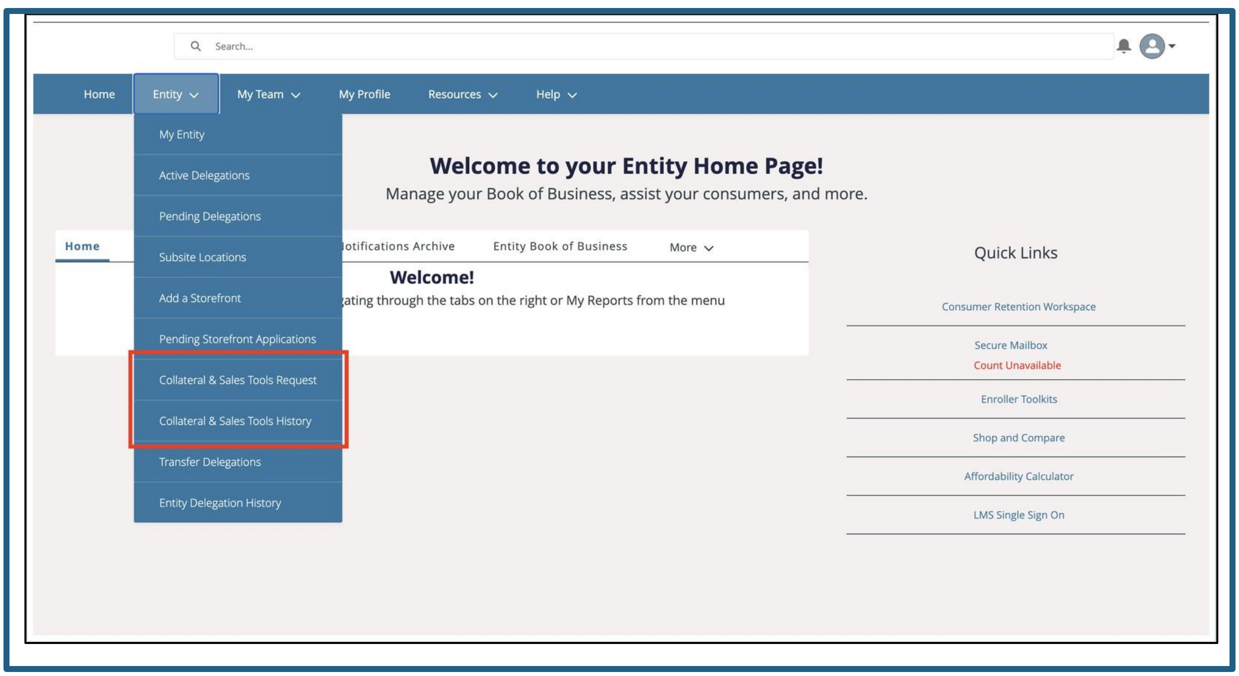
Requests flow directly to the Covered California field team, who review each request, fulfill the requested items from regional storage locations, and track inventory and budget against them. The result is a transparent, auditable process from the moment an enroller asks for collateral to the point those materials are delivered.

This is a comprehensive guide that walks through the feature end to end for requesting collateral through the enroller portal.

Requesting Collateral through the Enroller Portal

Open the Collateral and Sales Tools feature from your Entity Home Page.

1. From the Home Page, select the *Entity* or *Agency* tab in the navigation bar to open the dropdown menu.
2. Choose **Collateral & Sales Tools Request** to start a new request, or **Collateral & Sales Tools History** to review your past requests.

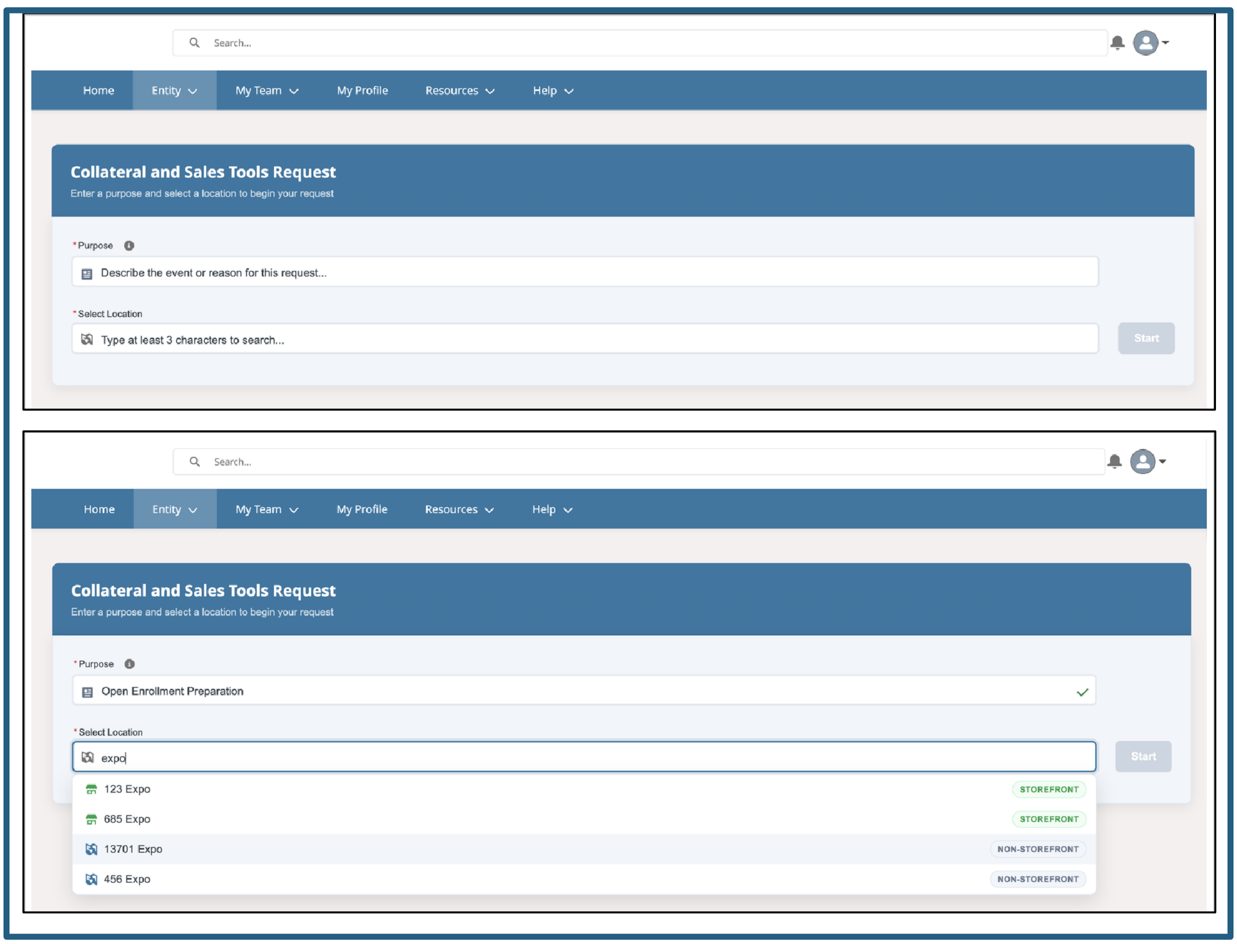


Submitting a Request

Step 1: Start a Request

The request begins with two required fields: a purpose, and a location. The **Start** button stays inactive until both are completed.

1. In the *Purpose* field, describe the event or reason for the request (for example, “Open Enrollment Preparation”).
2. In the *Select Location* field, type at least three characters to search, then choose the location from the results. Each result is tagged as STOREFRONT or NON-STOREFRONT.
3. Once both fields show a green check, select **Start** to open the request.

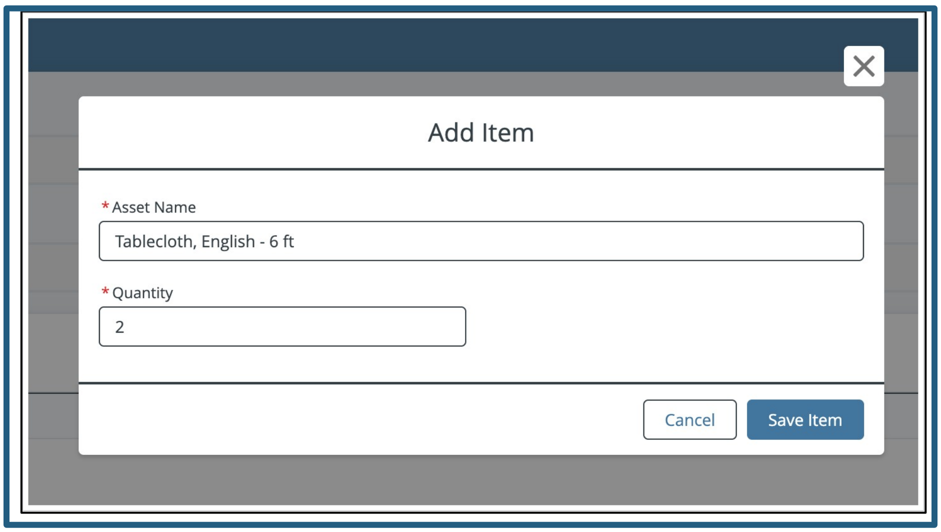


Note: The system will only display locations associated with the user. Results display a STOREFORNT or NON-STOREFRONT badge.

Step 2: Add Request Items

With the request open, add each item you need using the “Add Item” button. Items appear in the Request Items table, where you can edit or remove them.

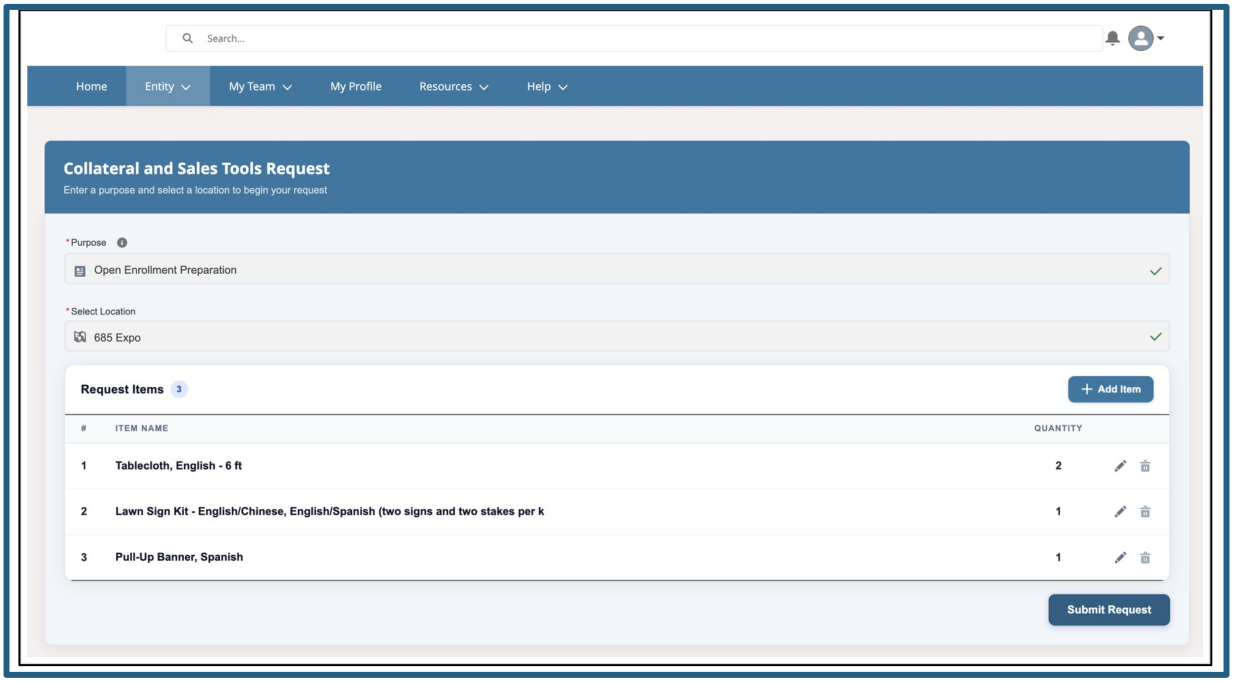
1. Select **+ Add Item** to open the *Add Item* window.
2. Choose the **Asset Name** (the collateral item) and enter the **Quantity** you are requesting.
3. Select **Save Item**. The item is added to the *Request Items* list.
4. Repeat for each item. Use the pencil icon to edit a row’s quantity, or the trash icon to remove a row.



Step 3: Submit Your Request

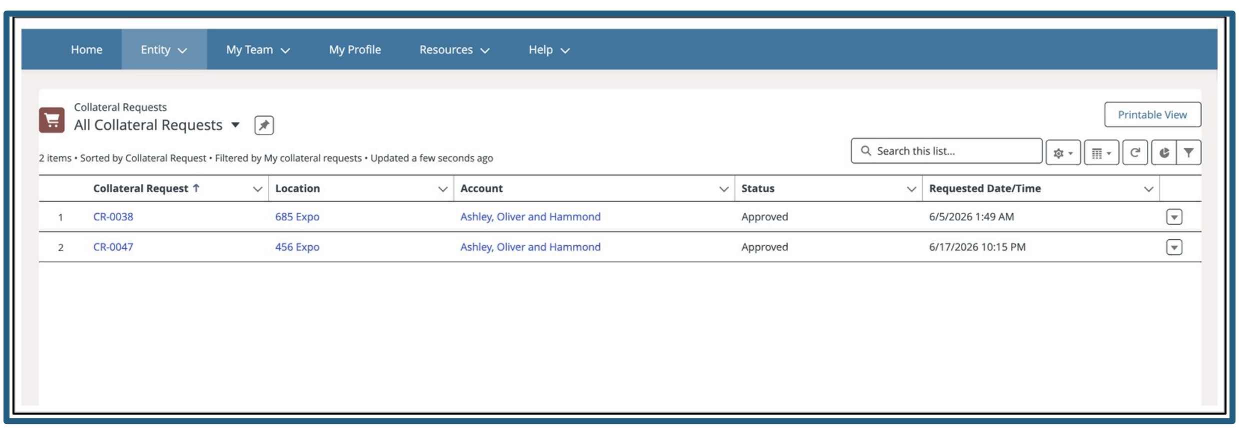
The request summary shows your Purpose, Location, and every item you have added, with a running count.

1. Review the *Request Items* list and confirm the item names and quantities are correct.
2. Make any final edits using the pencil and trash icons.
3. Select **Submit Request** to send the request.



Tracking Your Requests

The history list shows each Collateral Request with its Location, Account, Status, and Requested Date/Time. Open any request number to view its full detail.



Note: There are several different list views available:

- All Collateral Requests
- Draft Collateral Requests
- Submitted Collateral Requests

- Approved Collateral Requests
- Rejected Collateral Requests

The request detail page shows the current *Status*, *Location*, and the *Collateral Request Items*. As the field team fulfills your request, the *Quantity Provided* column is updated alongside *Quantity Requested*.