

Submitting a Claim

1. Go to Create Request in the Dealer Investment Fund submission tool on Synergy.

The screenshot shows the Synergy Dealer Investment Fund submission tool interface. At the top, the navigation bar includes 'DASHBOARD', 'SEARCH', 'CREATE REQUEST' (highlighted with a red circle and arrow), and 'ADMIN'. Below the navigation bar, there is a 'Back to Search' button and a large text area for uploading an auto-deduct file. The main content area is divided into two sections: 'REQUEST DETAIL' and 'CLAIM DETAIL'. The 'REQUEST DETAIL' section includes fields for 'Account' (a dropdown menu), 'Request Name' (a text input), and 'Type' (a dropdown menu). The 'CLAIM DETAIL' section includes fields for 'Status' (set to 'Pending'), 'Claim Code' (a dropdown menu), 'Invoice Dollars' (a text input), 'Claim Dollars' (a text input), 'Invoice Date' (a date picker), 'Claim Year' (a dropdown menu), and 'Payout Type' (a dropdown menu). There is also a 'Description' text area. At the bottom of the 'CLAIM DETAIL' section, there are buttons for 'Save and Add Another Claim', 'Save Claim', 'Clear Fields', and 'Send Update'. A red-bordered note states: 'Note: Your claim is not fully submitted until you click the Submit Request button below.' At the very bottom, there is a 'CLAIMS LIST' section with 'Submit Request' and 'Cancel' buttons.

2. Fill out all necessary fields and attach appropriate documents, save, then click submit (see pages 8–14 for itemized requirements).

This screenshot is identical to the one above, but with red circles highlighting specific elements. The 'REQUEST DETAIL' section (Account, Request Name, Type) and the 'CLAIM DETAIL' section (Status, Claim Code, Invoice Dollars, Claim Dollars, Invoice Date, Claim Year, Payout Type, Description) are circled. The 'Save Claim' button in the bottom right of the 'CLAIM DETAIL' section is also circled. Finally, the 'Submit Request' button at the bottom of the page is circled. The red-bordered note remains visible.

3. You will receive an email notification when your claim is approved. Allsteel will debit your Dealer Investment Fund and issue a credit memo within 30 days of approval.
4. If your claim is denied, you will receive an email notification and an explanation. If you were missing necessary documentation, simply attach the missing information and resubmit the claim.

GUIDELINES FOR CLAIMS

- All co-op claims must be submitted within 60 days after qualifying event.
- Dealers will receive payment via credit memo within 30 days of approval.
- Claims are processed by the last week of each month.
- Expenses incurred before January 1, 2018, or after December 30, 2018, will not qualify for 2018 funding. All 2018 claims must be submitted by January 31, 2019.
- To be eligible for reimbursement, claim and pre-approval requests must be properly completed with proper documentation attached.
- Claims in Canadian currency will be converted to U.S. dollars.

GENERAL

- To receive access to the Dealer Investment Fund submission tool, email programs@allsteeloffice.com.
- An overview of eligible investments can be found on page 7 of the Dealer Program Guide.
- If the amount of your claim is greater than the balance in your account, payment will be issued up to the amount available. Under no circumstances are these funds to be deducted from your Allsteel credit account prior to claim processing.