

Process e-Claims

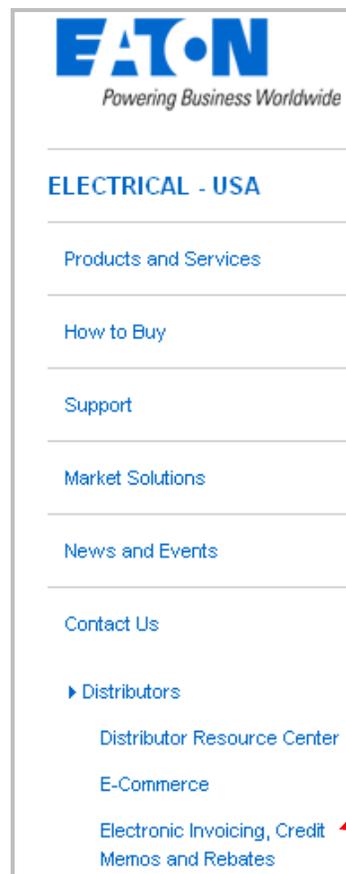
Electronic claims (e-Claims) provide a fast turnaround of your rebate claims without time-consuming data entry or the expense of EDI programming. E-Claims also offer helpful Excel reports allowing a review of rebate activity and quick focus on any rebate errors.

This document provides the steps to:

- Register for e-Claims
- Upload an e-Claim
- Review e-Claim reports
- Resolve Discrepancies

Register for e-Claims

1. Complete and return the e-Claim Request.
 - a. Copy and paste the following link into your browser:
<http://www.eaton.com/distributors>
 - b. Click **Electronic Invoicing, Credit Memos and Rebates**.



- c. Under **Registration Forms**, click **e-Claim Setup Request form (US users)**.
- d. Complete **e-Claim Request form**.
- e. Click **Submit**.

Note: Allow up to 48 hours for processing and receipt of your Sender ID and Excel Report Macro.

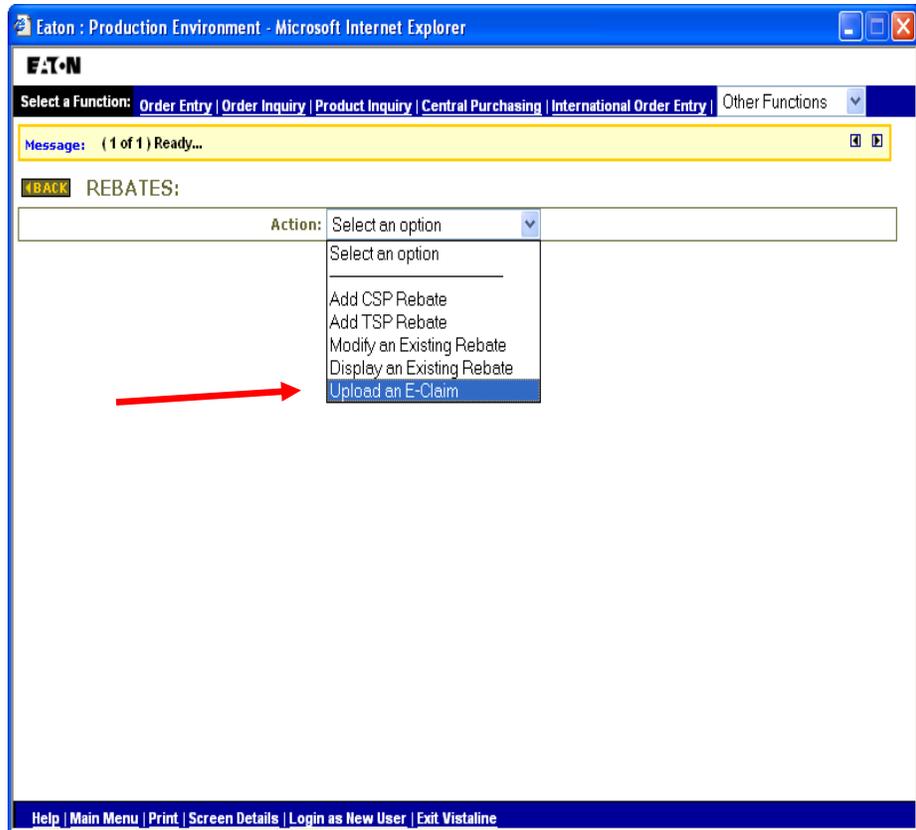
- 2. Compile your test file.
 - a. Copy and paste the following link into your browser:
<http://www.eaton.com/distributors>
 - b. Click **Electronic Invoicing, Credit Memos and Rebates**
 - c. Under **Training and Tools**, click **e-Claims Format (xls) (US users)**.
 - d. Click **Open**.
 - e. Type **Sender ID** in cell A1 on the spreadsheet
 - f. Complete all required fields in the e-Claim Format spreadsheet, as shown below.

Distributor ID#									
Distributor's Invoice #	Dist Inv Date mm/dd/yyyy	Qty	Product ID or NAED/UIC NO.	End Cust Vista #TSP ID	Dist Vista Cust #	Claim Amt (optional)	File Cost (optional)	Quote Cost (optional)	Customer Reference (optional)

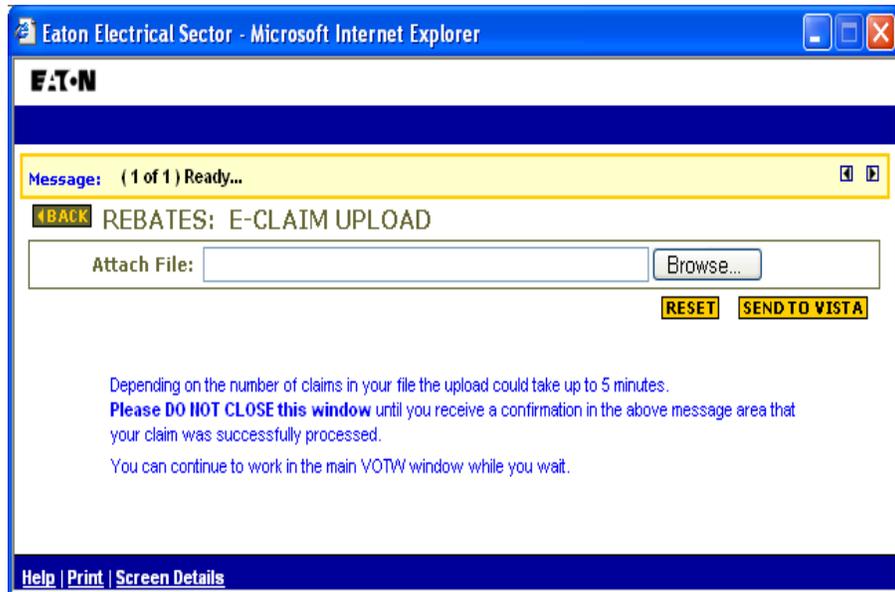
- 3. **Save** the spreadsheet.
- 4. Email the test file to E-ClaimSetup@eaton.com.
- 5. In the **Subject** line, type your **Sender ID** and **“Test File”**.

Upload an e-Claim

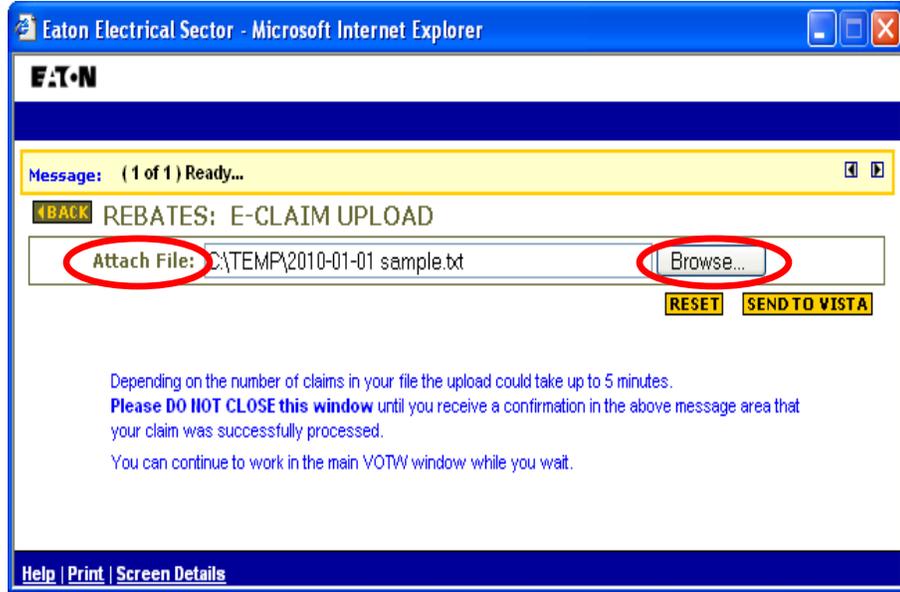
- 3. Login to VOTW.
- 4. Click the **Other Functions** drop-down menu.
- 5. Select **Rebates**. The Rebates window displays.
- 6. Select **Upload an e-Claim** from the **Action** drop down menu.



The Rebates: e-Claim Upload window displays.

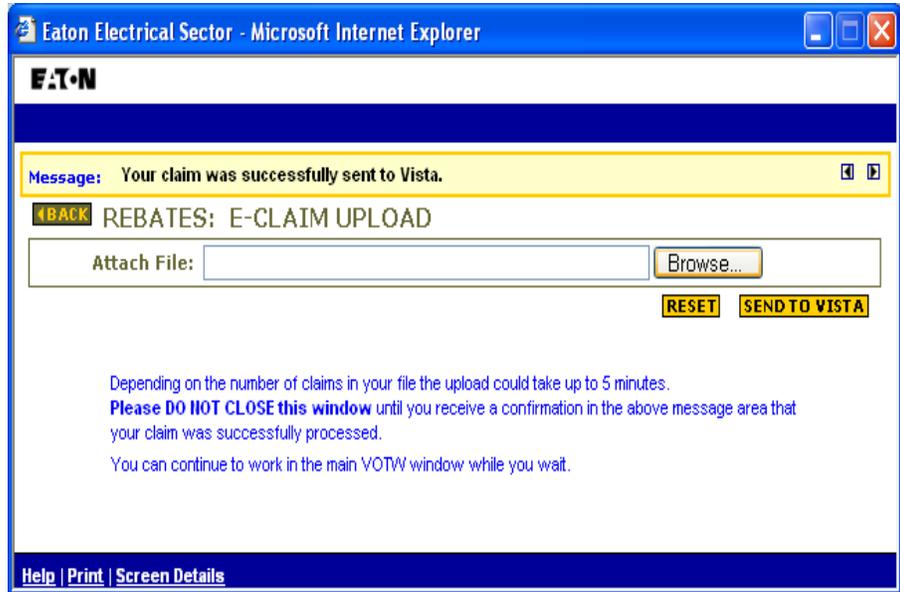


7. Click **Browse** to select an e-Claims file on or available from your PC, or type in the path and name of the file.



8. Click **Send to Vista**.

The message at the top of the screen will indicate whether the file is loading or there is an error and the file could not be received. Once the file is successfully sent to VISTA, you will receive the following message: "Your claim was successfully sent to VISTA". Do not close the window until you see this message.



Note: Once your e-Claim(s) are loaded into VISTA, a summary report of the record count and total dollars received will be sent in Word format to your company's designated e-mail address.

REPT: DR8440P0	EATON CORPORATION		PAGE: 1
DATE: 02/01/11	EDI FBED TOTALS BY CHECK- XYZ Supply		TIME: 01:13PM
CHECK NUMBER	EXTENDED AMOUNT	LINE ITEMS	DIST CLAIM REF NUM
110201BJ ELEC	7164.24	255	
TOTAL	7164.24	255	

Review e-Claim Reports

Four separate reports will be sent in individual messages. The files will be in .csv format and must be formatted using the Excel Report macro.

Note: The Excel Macro is available on VOTW (Menu > Other Functions > Macros) or it can be sent to the user by their Rebate Specialist.

- 1. Rebate Credit Detail Report** is an overall description of what was sent via e-Claim. The report includes: Claim ID, Item number, Claim Amount (if provided by customer), End Customer Information and Credit Memo Number. The Sales ID and District Manager information is included in case the customer needs to discuss an error with Sales.
- 2. Rebate Credit Summary By Distributor** report includes: Distributor Vista Number, Claim ID and Credit Memo Number/Invoice Number and Amount of Credit issued or Amount Owed By Customer (if Contra Claim).

DISTRIBUTOR NUMBER	CLAIM ID	CREDIT MEMO NUMBER	CREDIT MEMO AMOUNT	DISTR TOTAL
000001	X13CN	32100001	11003.74	
000001				11003.74
000001	X13CN	32100002	3546.14	
000001				3546.14
000002	X13CQ	32100003	1473.11	
000002				1473.11
000003	X13CR	32100004	2633.79	
000003				2633.79
000004	X13CS	32100005	7123.15	
000004				7123.15
000005	X13CT	32100006	7101.28	
000005				7101.28
		GRAND TOTAL	32881.21	32881.21

Note: Multi-branch distributors can easily use this summary by branch for internal accounting purposes. Total amount by distributor will be bolded in blue.

Note: Credit Memo and amount must be referenced on your check remittance.

3. **Rebate Credit Summary by End Customer** report includes: End Customer Vista Number, Name, Eaton's Approved Amount, Claim Amount (if included in the e-Claim), and variance. This report is for the customer to check if there is an end customer with CSP pricing issues that they will derive from the Detail Report.

END CUST	NAME	REBATE EXT	CLAIM AMOUNT	VARIANCE
100000	RITZ ELECTRIC	6.30	4.18	-2.12
200000	GIZMO RESI SERVICES	417.02	418.75	1.73
300000	SMITH ELECTRICAL CONSTRUCTION	1158.57	1305.69	147.12
	TOTALS	1581.89	1728.62	146.73

Note: Variance by end customer can highlight whether discrepancies are specific to one particular CSP or across the board for all customers.

4. **Duplicate Rebate Items/10K Line Item Reject** report includes details of transactions rejected.
 - Contact your Eaton Rebate Specialist to discuss claim rejections or call the Rebate Support line at 1-888-774-1771.
 - Fax the original, unaltered copy of the referenced invoice to Rebate Audit Group (412) 893-2121 for **Over \$10K Item Rejections**.

Resolve Discrepancies

Every effort is made to provide correct Price Authorizations, however rejections will occur. Below are tips for resolving errors in a timely manner.

- Reference each Credit Memo Number for its respective amount as outlined on the Rebate Credit Summary by Distributor report.
- Review e-Claim spreadsheets promptly to present errors on subsequent claims.
- Contact your local Eaton Field Sales Representative regarding the error codes in Table 1:

Table 1: Error Codes

Error Code	Description
6184	No CSP agreement found
6231	Product not eligible for rebate on claim date
6233	CSP agreement is cancelled
6234	CSP authorization is not approved by C-H
6235	CSP rebate authorization has expired
6236	Item not included on CSP
6250	No TSP agreement found for this customer
6252	TSP authorization has expired
6253	Item not included in TSP price authorization
6263	Purchase price is less than authorized price
6264	Rebate multiplier > or += stock multiplier
6268	Both rebate price and multiplier equal 0
6375	CSP authorization has expired
6377	No CSP authorization exists on rebate claim date

- Contact the Rebate Support Line at 1-888-774-1771 to:
 - g.** Discuss all other Error Codes
 - h.** Coordinate release of additional credit following confirmation of CSP/TSP modifications from Field Sales. Reference the Claim ID/Item involved.
- For any other questions/issues, send an email to e-Claimsetup@eaton.com. Include your Sender ID and a brief description of the issue (include Claim ID/Item).

Note: For further assistance, contact Eaton's Electrical Sector Enterprise Support at 1-800-468-1705, option 3.