Manufacturing (MFG) Supplier Training: Creating and Viewing a Claim

LAVANTE
A PRGX Company

Supplier Deduction & Claim Management Platform

⚠ Please read the below completely before submitting Manufacturing

Manufacturing Supplier Claims Policy

Manufacturing Claims Policies:

▶ All claims are due within 180 days of the deduction date

▶ All claims must have the required supporting documentation attached at the time the claim is entered.(See pg. 10)

▶ Submission of a claim without supporting documentation attached will result in the claim being denied. Suppliers will then be responsible to submit a new claim within the required 180 days.

   ▶ All required approvals/communication must happen before the claim is submitted.

▶ Questions/Comments on invoices do not replace claims. If you wish to dispute a deduction, please file a claim.

How To:
Create and View a
Manufacturing (MFG) Claim

LAVANTE
A PRGX Company

Supplier Deduction & Claim Management Platform
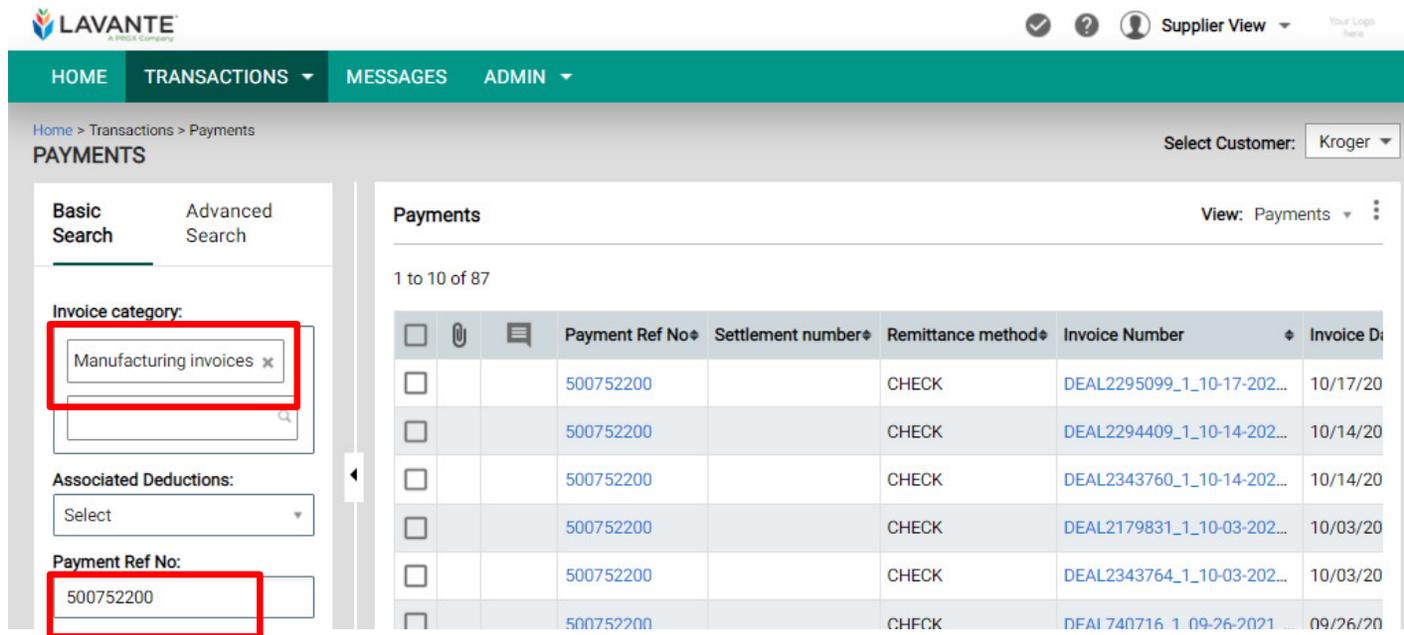
Step One: Navigate to Payments Screen

Logged into Lavante, click the **"Transactions"** tab at the top of the page of your menu bar.

Click on **"Payments"** to proceed.

Step Two: Search for Payment

By inputting **"Warehouse invoices"** in the **"Invoice Category"** box and the payment number in which you would like to create or view a claim for in the **"Payment Ref No"** box, all payments, invoices, and deduction amounts related to the payment number are displayed.

Note that promotion deduction data associated with payments takes a week to load in the system.

Step Three: View Payment Details

After selecting the desired payment reference number, the associated details will be generated in the **"Payment Details"** screen.

Step Four: Create a Claim

To create a claim for the payment directly within the **"Payment Details"** screen, click on the blue **"Create claim"** button in the top right of the screen.

Manufacturing (MFG) Claim Type Descriptions

Claim Type	Claim Type Description
MD - MFG Cash Discount	Deduction taken as "Discount Amount" on vendor invoice. Amount taken as a percentage per terms. Please research terms internally before submitting Cash Discount Claims. Support documents must include documentation that discount was erroneous.
MC- MFG Cost Difference	Deduction for unit cost difference from supplier's invoice
MO - MFG Overage	Overpayment made above the gross amount of a supplier's invoice or a duplicate payment on invoice.
MS - MFG Unit Shortage	Deduction for unit shortage from supplier invoice
MP - MFG Stop Payment	Requesting a check to be reissued if it has not arrived within 30 days of the check date listed on the platform. See "Stop Payment" Document before requesting stop payment
MW - MFG Wrong Vendor	Deduction or Payment made to the Wrong Vendor not sharing the Same Supplier ERP ID
MI- MFG Plant Billing	Billings generated by Plants to bill Supplier

Step Five: Enter Claim Details

After clicking on the blue "**Create claim**" button on the "**Payment Details**" screen, you will have the ability to enter information about the claim on the "**Create Claim**" screen.

Required Supporting Documents by Claim Type:

Supporting Documents ⓘ

Add Document

Document Type	Upload Document	Document Visibility	Uploaded By	Uploaded On	Buyer/Supplier	Action
- Select Document Type - ▼	Choose File No file chosen	◉ Public ○ Private				🗑

Claim Type	Required Documents
MD - MFG Cash Discount	• Invoice Copy • Support showing communication that terms are not correct in Kroger systems between the
MC- MFG Cost Difference	• Invoice Copy • Support showing that communication between suppliers' sales team (who negotiate cost) and Kroger Sourcing Managers (who agree to and confirm cost) has taken place and cost. Sourcing Manager must confirm cost on the PO and should be repaid.
MO - MFG Overage	• Invoice Copy • Pack List (optional but preferred) • Signed Proof of Delivery from the Plant (must include plant signature)
MS - MFG Unit Shortage	• Invoice Copy • Pack List (optional but preferred) • Signed Proof of Delivery from the Plant (must include plant signature)
MP - MFG Stop Payment	• Stop Payment Form (See Manufacturing Plant Payables section of the Help/FAQ on Lavante Home Screen) • Confirmation of correct mailing address as shown in Kroger Supplier Hub (add to claim description field)
MW - MFG Wrong Vendor	• Deduction or Payment made to the Wrong Vendor not sharing the Same Supplier ERP ID
MI- MFG Plant Billing	• DDD#####DDTTTT –Support showing why it should be repaid based on the reason for deduction/Communication from the plant stating deduction made in error.

Step Six: Attaching Supporting Documents(Continued)

Attach Supporting Documents supporting documents as required for your claim type in the previous slide.

- Select the document type from the drop down that best describes the document you are attaching.
- Documents must have "Document Visibility" set to Public for Kroger Associates to view. No other suppliers will have access to your documents under your account.
- Documents can be .pdf, .doc, .xls, .pft, .msg, and .csv
- You may add multiple documents by clicking (Add Document)
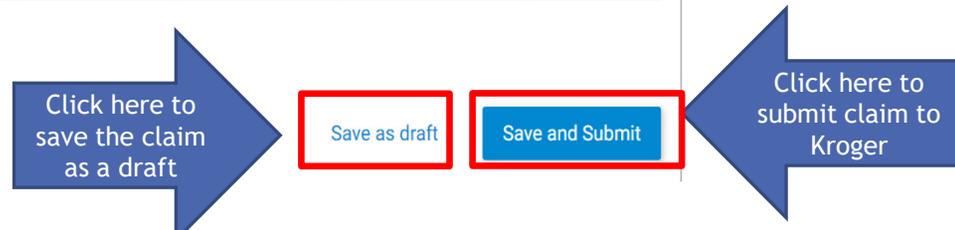
Step Seven: Save and Submit Claim

After you have entered all of the required fields and attached your Supporting Documents, click "Save and Submit" claim to be reviewed by Kroger.

You may also use the "Save as Draft" option to save your place and come back to your draft at a later date to complete.

Please note: Claims saved as draft will not be reviewed by Kroger and are not visible to our teams until they are "Save and Submitted"

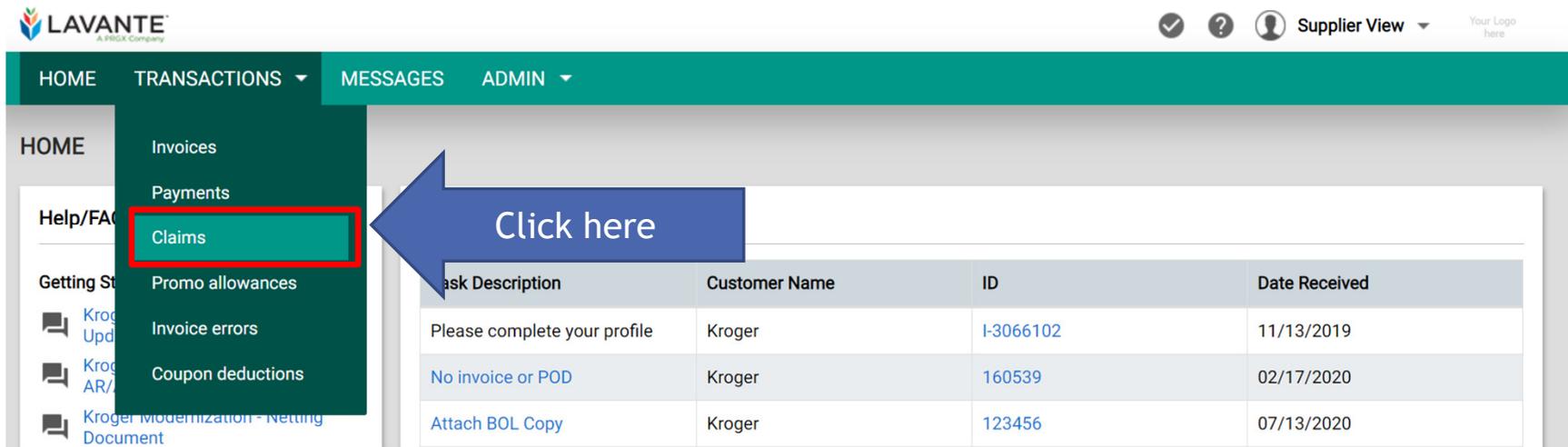# Optional Claim Entry Method: Entering Claim

In addition to creating a claim directly within the "**Payment Details**" screen, a claim can be created in the "**Payments**" screen. After searching for the desired payment number, simply click on the checkbox next to the applicable records, then click the blue "**Actions**" button and finally click "**Create Claim**".

Step Eight: View Previously Submitted Claims

In order to view submitted claims, you must navigate to the **"Claims"** screen within the system.

Logged into Lavante, click the **"Transactions"** tab at the top of the page of your menu bar.

Click on **"Claims"** to proceed.

Step Eight: View Previously Submitted Claims (continue)

After filling in the search criteria under the "**Claims**" header, a population of claims records will generate on the "**Claims**" screen. Simply click on the applicable "**Claim ID**" to open the claim details.
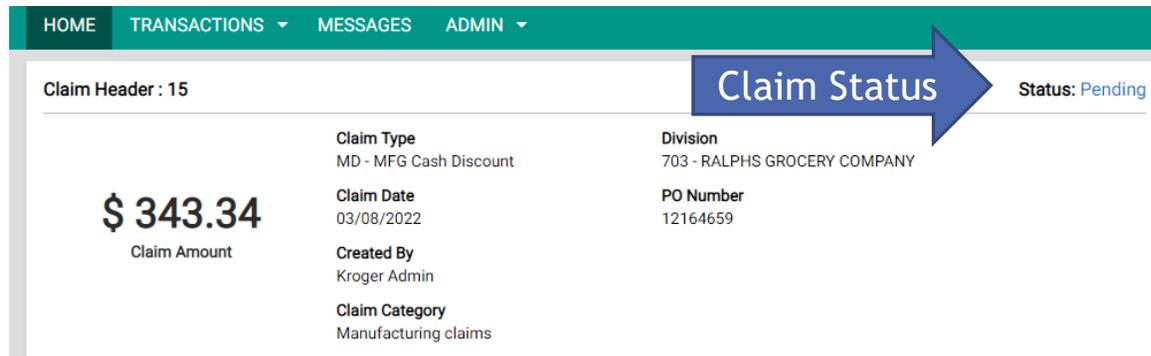
Step Eight: View Previously Submitted Claims (continue)

After clicking on a specific claim, the claim details will open in the "**Claim Details**" screen.

Claim Status Definitions:

You may view the status of your claim at any time by reviewing your claim header

▶ Open: You have not fully saved and submitted your claim, and it is not in Kroger's team to review.

▶ Pending: The Claim has been sent to the next workflow for review.

▶ Closed: Claim was closed by Kroger and feedback provided on research findings/resolution decision.

▶ Pending Updated: Claim is assigned to the supplier user/submitter and needs attention to be considered valid for review. If that user/submitted does not go into the and click Edit -> Save & Submit, the claim is not in queue to review by our teams.

   ▶ See "Lavante How To- Updating PENDING Update outstanding task" on the Help/FAQ section of the Home screen for more information.

Step Eight: View Previously Submitted Claims (Continued)

After clicking on a specific claim, the claim details will open in the "**Claim Details**" screen. In addition to general claim details and supporting documents, links to the payment details and associated deductions are located towards to the bottom of the screen.
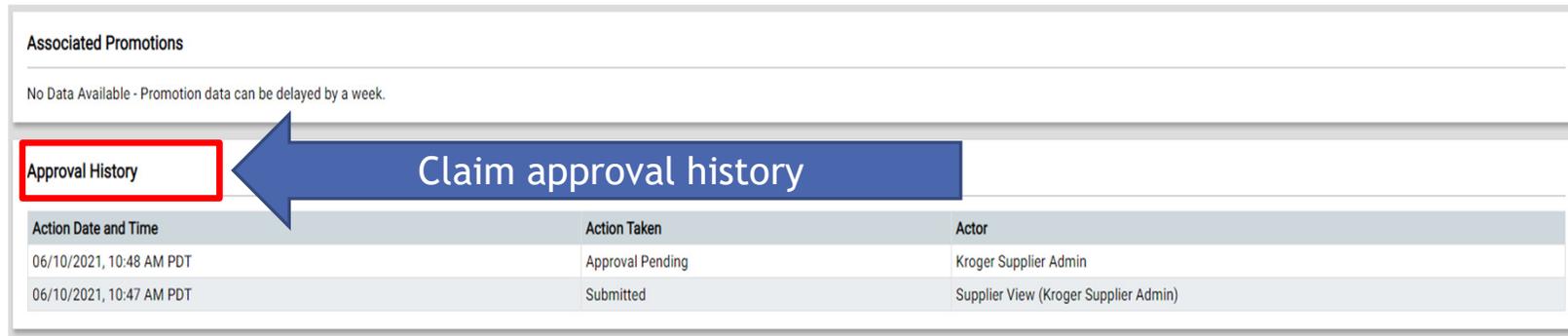
Step Eight: View Previously Submitted Claims (Continued)

After clicking on a specific claim, the claim details will open in the "**Claim Details**" screen. Approval history is located towards to the bottom of the screen.

Optional Step Nine: Adding Comment to Closed Claim

After clicking on a specific claim, click the blue "**Add comment/question**" button in the top right corner of the "**Claim Details**" screen.

Optional Step Nine: Adding Comment to Claim (Continued)

After clicking the blue "**Add comment/question**" button, an "**Add comment**" pane will open on the right side of the screen. Type any necessary comments in the "**Add comment**" box, and then click on the blue "**Add comment**" button below when you are ready to submit the comment.
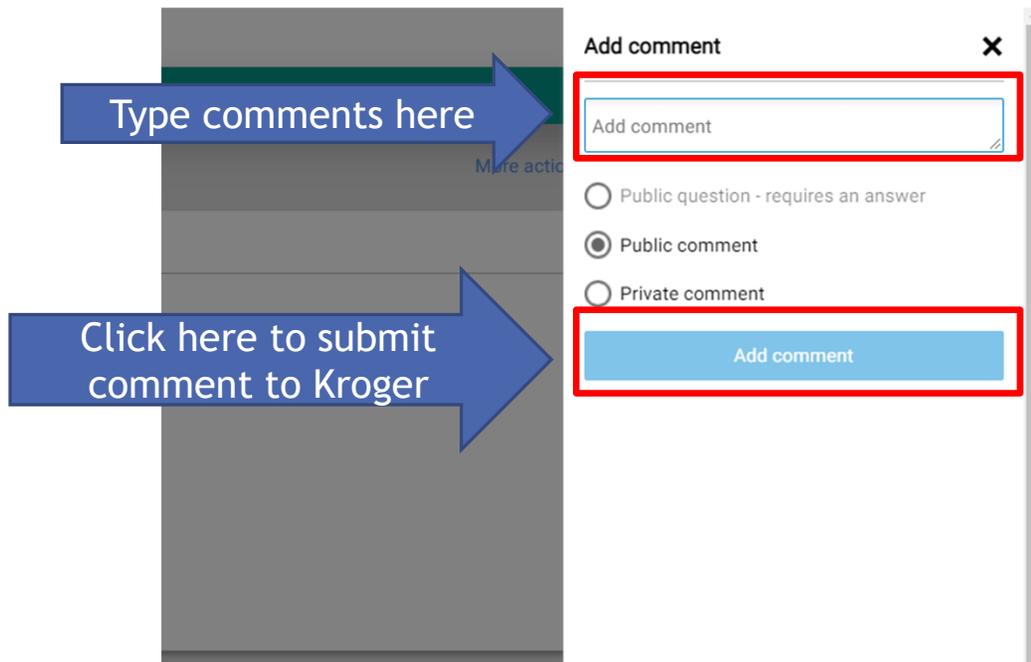
Type comments here

Click here to submit comment to Kroger

Add comment ✕

Add comment

◯ Public question - requires an answer

◉ Public comment

◯ Private comment

Add comment

Important: Questions are not allowed on pending/open/pending update claims. Adding comments requesting status update on your claims will not receive response. The comment section is intended to only provide addition information to your claim. These comments are not viewed until your claim is being reviewed.

Claims are reviewed in the order they are received and most often in the SLA Responses times published in the MFG FAQ Document.

Technical Use Support Information:

Lavante has replaced shared email addresses for research requests, however at times you may have a need for instructions submitting your claim or question.

All efforts should be made to utilize the training documents, such as this document before making contact with Technical Support.

The below contact is for technical use support **only**. Do not submit any other question or claim to this contact.

Email: productsupport@kroger.com

Lavante Technical Support *will not provide*: status on payments, review of your statement, provide you status on previously filed claims, policy exemption or review, grant user access, or answer questions that do not relate to technical use of the Lavante Platform.

Service Lavante Technical Support will provide: helping you navigate submitting your claim or help understanding an error message.

Lavante Technical Support should not be listed as your AP contact or on any contact list sending automated emails.