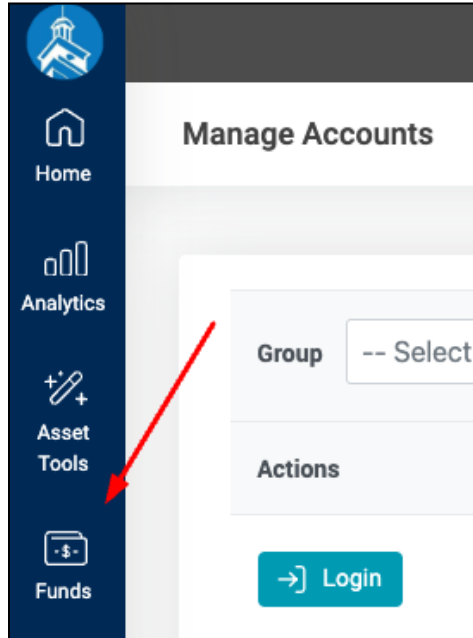




HOW TO:

Disburse Funds

Step 1: To begin Disbursing Funds, select **Funds** from the left navigation menu.



Step 2: From the **My Funds** tab, click the **Actions** dropdown and select **Disburse Fund**.



Step 2B: You can also check to see if a fund has already been disbursed by selecting the **Manage Accounts** tab, finding the account and clicking **Actions > Manage Funds**.



Step 3: Select Recipient Account by typing in the Name, Company Name or TP ID of the Store that will receive the funds. It will appear in the dropdown, at which point you can select it.

Parent Fund Name: 2023 MarketShare (TESTING) | Expires: 12/31/2023 | Currency: USD

Select Recipient Account *

Search by name, company name or tp id

agency

ASR PA1 Test Agency1 I - I Test Agency (TPID: AA9500)

ASR PA1 Test Agency1 I - Test Agent Notes Book 22 (TPID: AA9579)

Step 4: Enter the **Fund Balance** to disburse to the store selected. This is the only required field on the fund disbursement form. Click **Save Changes** when complete.

The optional fields are as follows:

- **Fund Name:** Auto-filled - this can be ignored, no need to change.
- **Fund Tags:** Not Applicable - this can be ignored.
- **Available for Administrators only:** Not Applicable - this can be ignored.
- **Notes:** You can add internal notes or select the **Display this note to the subaccount** box, so the Agent can view the fund disbursement notes.

Parent Fund Name: 2023 MarketShare (TESTING) | Expires: 12/31/2023 | Currency: USD

Select Recipient Account *

ASR PA1 Test Agency1 I - I Test Agency (TPID: AA9500)

Only accounts with the same currency (USD) as the fund you're working with can be selected.

Fund Balance *

\$ 200 / \$1,000.00

Fund Name *

2023 MarketShare (TESTING)

Fund Tags

Fund tags allow your network to target this fund based on rules for budgets.

☐ Available for Administrators only

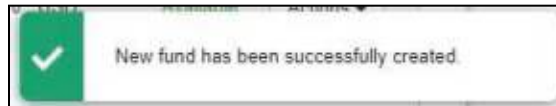
Notes

☐ Display this note to the subaccount

Notes are only saved during initial disbursement or when adjusting the balance.

Save Changes Cancel

Funds disbursed will be deducted from the balance of your fund, and a message will appear in the bottom right corner: **“New fund has been successfully created”**.



Step 5: To review the funds in the Agent Account, **Login** to the account in question under the **Actions** column on the homepage.

| Group | Account Type | Status | Company, Account Id, Us... | | | | |
|-----------------------|-----------------|------------------------|--|------------------|------------------|-------------------|-----------|
| Actions | Company Name ↑↓ | Full Name ↑↓ | Address ↑↓ | Account ID ↑↓ | TP Account ID ↑↓ | Account Type ↑↓ | Status ↑↓ |
| Login | I Test Agency | ASR PA1 Test Agency1 I | 100 Erie Insurance Place Erie, Pennsylvania 16530 | AC22090002091244 | AA9500 | Additional Office | Activated |

Step 6: Select **Funds** from the left navigation menu to find the fund you disbursed. Click on the fund in question.

[Home](#)[My Contacts](#)[Get Started](#)[Orders & Activity](#)[Marketing Claims](#)[Funds](#)

My Funds

Funds

Available ▾

Search by Fund Name or ID

1

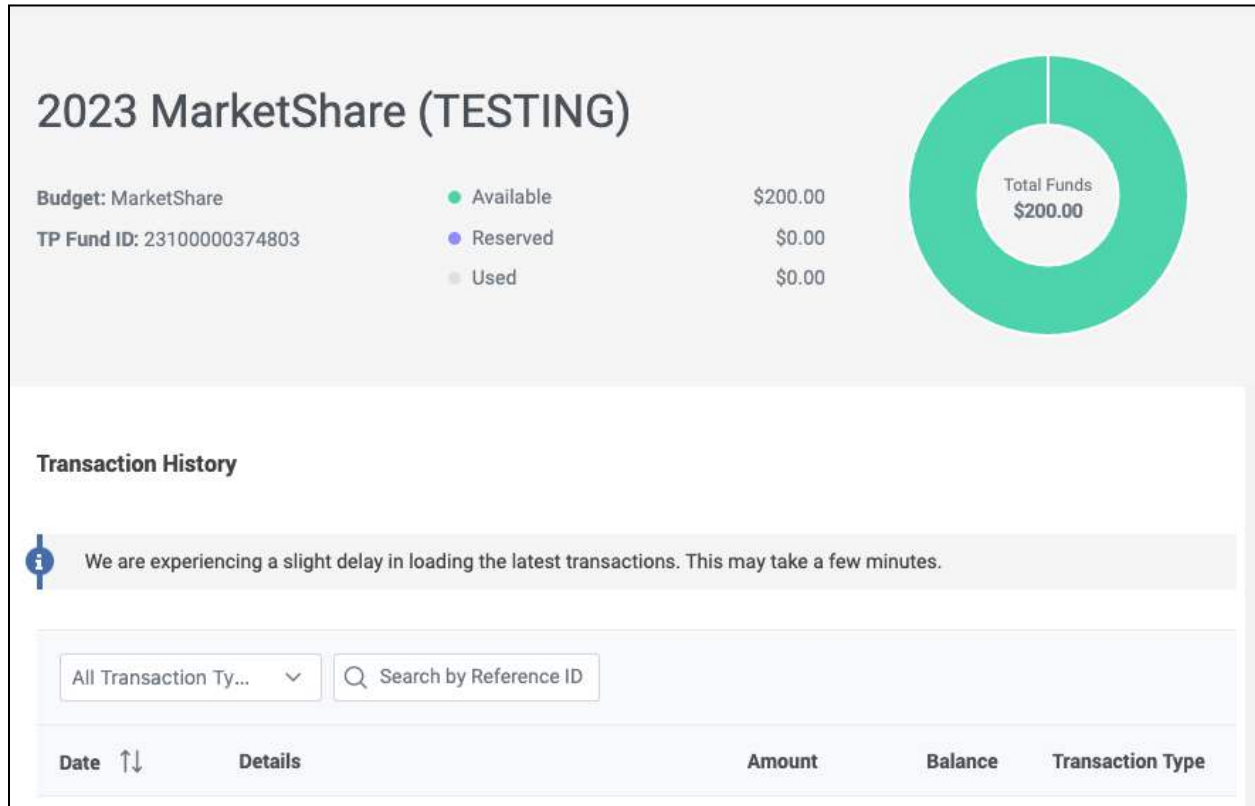
DEMO - MarketShare (Fund Pool)
MarketShare\$5,000.00
Exp: 12/31/2023

DEMO - MarketShare (Fund Tra...
MarketShare\$1,140.03
Exp: 12/31/2023

2023 MarketShare (TESTING)
MarketShare\$200.00
Exp: 12/31/2023
New

Step 7: Review the details of the fund.

**Please note, this page may take a few minutes to update. If you view the transactions immediately after disbursing funds, the disbursement may not appear yet.*



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Have additional questions?

SproutLoud's expert customer support team is here to help.

Monday-Friday from 9:00am – 8:00pm EST

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Live Chat: available online during business hours