CofaNet **Essentials**

GENERAL QUESTIONS ABOUT **COFANET ESSENTIALS**

GENERAL AND NAVIGATION

What are the minimum technical specifications required for CofaNet Essentials to operate?
Your internet access must be through one of the following browsers:

> Chrome 51
> E11
> Safari 9.0.3
> Mozilla Firefox 45

Is Cofanet Essentials optimized for my tablet, or smartphone?
CofaNet Essentials is designed for desktop and tablet. If you wish to use CofaNet Essentials on your smartphone, we recommend to download our app CofaMove.

Where can I find user guides about CofaNet Essentials?
All documents related to CofaNet Essentials functions are located in your portal under the Tool section.

How can I set up CofaNet Essentials?
To personalize CofaNet Essentials you can go to User/Profile/User Preferences. In this section you can customize language settings, contract and landing page per default, among others.

How can I personalize the quick access bar?
Underneath the header, the blue bar is the quick access bar. It enables you to get the functions you are using the most. You can customize the quick access bar in the menu user/ profile. You can set up to 4 functions.

What are the differences between the two search functions located at the top of the page?
You can either decide to search for a company via the quick search function, by filling in directly the company's name. As it is an autocomplete function powered by google, the service will return 5 proposals in which you may find the company.
Or you can use the Advanced Search function, and choose to search by Company's name and address, or legal identifier.

Who should I contact to get more information about CofaNet Essentials, or find answers to any question?
In your portal you can download different documents about CofaNet Essentials, and, or complete the contact form. You may also contact your account manager.

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PORTFOLIO

What does Portfolio view mean?

CofaNet Essentials provides you with a list of your customers' portfolio. In one glance you can visualize the creditworthiness of your customers, Coface risk underwriting decisions via the risk portfolio, and follow the indemnification process via the overdue portfolio.

Does the portfolio provide the full and exhaustive list of buyers, prospects?

By default, the portfolio view displays only the last 100 companies on which there have been some changes.

If you have more than 100 companies, you can use the Export functionality to retrieve your entire portfolio.

You can also use the search criteria to filter your portfolio and adapt it to your needs.

How can I export my portfolio?

From the menu Tools you can access to Customized export function. Your export is immediately available for exports containing less than 1000 lines, and available on the following day for all others.

What is imminent end date icon displayed on the top of my portfolio?

The imminent end date icon is a quick filter to visualize all decisions that will end in the next 30 days.

What does the star icon means?

To track one of your buyers more closely, you can tag the company as "My favourite". You can access and manage your favourite companies from menu/User/ favourite companies.

I have requested a credit decision, but I don't see Coface answer on my portfolio, how come?

As soon as your credit limit request is submitted, it is sent to the Coface risk underwriting department who will analyse the request.

Our decision may be immediate, and you will get immediately an update in your risk portfolio.

Sometimes, a deeper analysis is necessary to make a final decision. In that case, your request has a pending status, and is listed in Pending requests list, accessible from menu risk/pending requests.

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MANAGEMENT OF YOUR CREDIT INSURANCE POLICY

How can I add a new buyer/ prospect to my portfolio?

To add a new buyer or prospect to your portfolio you should look for the company in our worldwide database.

This function can be accessed by clicking on "Advanced Search" in the header. It allows you to search for a company by different criteria.

To finalize the action, you have to order a product.

How can I add cover on a buyer?

To add cover on a buyer, you should enter in the buyer's company's detail page, by clicking on its name from your portfolio, and select the cover type from the action box.

What is a Positive Credit Decision?

A Positive Credit Decision is a credit decision that grants a total or a partial cover compared to the requested amount.

What could happen in case of Refusal/Cancellation?

After a Refusal/Cancellation, deliveries you made after receipt of our notice won't be insurable.

I want to add a cover on a buyer, what amount should I request?

You should request the highest total outstanding amount forecasted with your Buyer.

You can also add a small margin for potential unplanned Delivery.

Avoid unnecessary oversizing of your credit limits, which may raise questions in our analysis or just delay our answer.

Can I see the reason for a restrictive decision?

For each restrictive decision, the detail of the decision provides you the reason of Coface's position. Click on Expand to see the full details about the decision.

How can I request an extension of due date for one buyer?

To request an extension of due date on a buyer, you should enter in the buyer's company details page, by clicking on its name from you portfolio. Then select "Extension of due date" from the action box.

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••• POLICY

How can I submit a notification of overdue accounts?

To submit a notification of overdue account, you should enter in the buyer's company detail page, by clicking on its name from you portfolio. Then select "Notification of overdue account" from the select action box.

To complete my notification of overdue accounts, how can I transfer my documents (Invoices, statement of accounts)?

After having submitted your notification of overdue accounst, you may upload any documents, by clicking on the action button "upload document".
The upload document is located on the synthetic view of the overdue account notification of the buyer on its company's detail page.

I wanted to send a Notification of Overdue Accounts (NOA) but my buyer is already insolvent, what can I do?

As soon as you are aware of its insolvency and at the latest within your contractual period set in the Special terms, you should send us your NOA. Your indemnification will then be triggered within 30 days from our receipt of the documents related to the Debt.

How can I add my internal reference(s) to identify more easily the buyers of my portfolio?

You can use the Customized user Fields, in Policy menu, thanks to which you can create up to 5 personalized fields.

Where can I find an overview of all my non-payment cases and their current status?

In the menu "Overdue" the portfolio provides an overview of all your non-payment cases. The Indemnity follow up view provides more details on the progress of your submitted claim cases.

How should I declare my Turnover?

To declare your Turnover, you should select the Policy menu / Activity Declaration. Reminders are sent to you when you need to complete your declaration. The notification list will be displayed automatically in this section.

What & when should I declare?

The whole turnover is defined as the total sales made during the insurance period minus the non-insurable Debts. It should be done for each reporting period within the declaration period (both stated in your Special Terms).

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