



The Vault

by

LPMA powered by **Interchange 360**

Training Manual #2

*Producer Homepage, Manage Users
& Support Cases*

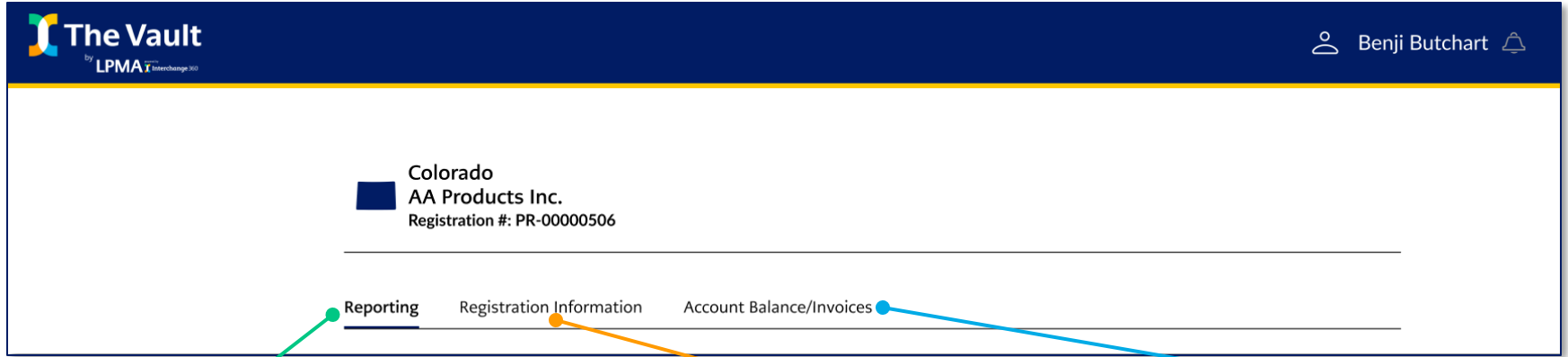
October 6, 2025

The Vault Homepages

Landing page per program (state) where users can view and manage information related to their registration, reports, invoices, manage users and manage supports cases.

The Vault Homepage

The Member/Participant Homepage in The Vault consists of three tabs:



Reporting

View/manage Reports or Report Adjustments.

This is the default tab for the homepage.

Registration Information

View information that was submitted as part of the Program Registration.

Account Balance/Invoices

View Program Statements, Invoices, Payments and Refunds.

Homepage Header and Notifications

The homepage for each Member/Participant will default to the *Reporting* tab.

Page Header:

The page header on the homepage displays the:

- Program Icon
- Program Name
- Account Name
- Unique Program Registration Number

The screenshot shows the member homepage for Colorado AA Products Inc. The header includes the LPMA logo and the user's name, Benji Butchart, next to a bell notification icon. A green box highlights the program information: Colorado AA Products Inc., Registration #: PR-0000506. The main content area has tabs for Reporting, Registration Information, and Account Balance/Invoices. The Reporting tab is active, showing a Program Account Balance of \$766.70. Below this is a section for Reports with a search bar and a filter button. A table lists reports, with one report for Apr - Jun 2024, Report Type: Report, Due Date: September 1, 2024, Status: Submitted, and a View button. The footer contains the LPMA logo, Privacy Policy link, and Contact Us information (Email: info@interchange360.com, Create a Support Case button).

Bell Notification:

New notifications will display here to alert the Member/ Participant of a pending action item (refer to [Communications](#) for additional details)

Navigation Menu

Member/Participant can access a Navigation Menu by clicking on their name at the top right of the page.

The screenshot shows the user interface for 'The Vault' by LPMA. The user is logged in as Benji Butchart. The navigation menu is open, showing options: Program Dashboard, Manage Users, My Communications, My Support Cases, and Logout. The main content area displays the user's profile for Colorado AA Products Inc. (Registration #: PR-00000506) and a 'Reporting' section with tabs for 'Reporting', 'Registration Information', and 'Account Balance/Invoices'. The 'Reporting' tab is active, showing a 'Program Account Balance' of \$766.70. Below this is a 'Reports' section with a search bar and a 'Filter' button. A table of reports is displayed with columns for Report, Report Type, Due Date, Status, and Manage.

Report	Report Type	Due Date	Status	Manage
Apr - Jun 2024	Report	September 1, 2024	Submitted	View ...

Navigation Menu Options:

- **Program Dashboard:** Allows users to access the Program Selection page to register in a new Program and access all their registered Programs.
- **Manage Users:** Only visible for Account and Program Admins, this allows for managing which users can access The Vault on their organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** Users can view their submitted Support Cases and check the status.

Reporting Tab

The Reporting Tab is the default page that a user will land on when accessing a Program. It displays information about current and historic reports.

Page Banner:

If a Member/Participant has pending or overdue reports to be completed, a message will be displayed here.

Reports Table:

This table displays all Reports, organized by their Report Name (i.e., the reporting period). They are categorized by type (Report or Adjustment), due date, and status.

The screenshot shows the 'Reporting' tab for 'Colorado AA Products Inc.' with registration number PR-00000506. The user is Benji Butchart. A message box states: 'You have pending reports to be completed.' Below this is the 'Program Account Balance' section, which shows a balance of \$0.00. A note below the balance reads: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied.' At the bottom, there is a 'Reports' table with the following data:

Report	Report Type	Due Date	Status	Manage
Apr - Jun 2024	Report	September 1, 2024	Not Started	Start

Program Account Balance:

The Members/Participant's current Account Balance for this Program is displayed.

*Program Account Balance = Starting Balance + Invoices - Payments - Refunds

Manage Action Column:

Shows the action available depending on the status of each Report.

Registration Information Tab

The Registration Information Tab displays program specific business information for the Member/Participant Organization

The screenshot shows the 'Registration Information' tab for 'AA Incorporated Inc.' (Registration #: CO-00000506). The 'Business Information' section is highlighted with a red box and an arrow pointing to the detailed view on the right. The 'Additional Locations' section shows a table with one entry: 'Colorado ABC Used Oil' at '2001 Colorado Blvd, Denver, Colorado 80202' with phone number '303-555-1234'. Below this are sections for 'Program Eligible Materials' and 'Suppliers'.

Business Information

Business Name AA Products Inc. **Program Registration #:** CO-00000506

Primary Line of Business Importer **Secondary Line of Business** Distributor, Other

Business Start Date August 14, 2024

Additional Locations Please list out all additional locations for the company in the state. [Add Location](#)

Location Name	Location	Phone Number	Manage
Colorado ABC Used Oil	123 Fake Rd, Aspen, CO 81611	(303) 123-1231	Edit ...

1 Result 5 entries per page

Business Information Displays key Member/Participant details including account name, program registration #, primary and secondary lines of business and business start date. Users can also add additional locations within the registered jurisdiction.

Registration Information Tab

The Registration Information Tab lists Suppliers and Customers for the Member/Participant Organization

Reporting Information

Reporting Frequency: Quarterly
Next Report Generation Date: December 3, 2023

Business Information

Account Name: ABC Incorporated Inc.
Program Registration #: CD-00000001

Additional Locations

Location Name	Address	Phone Number	Manage
Colorado ABC User 01	2001 Colorado Blvd, Denver, Colorado 80202	888-511-5111	Edit ...

Suppliers

Please select all companies who supply your business with Program Eligible Materials.

Search for a business:

Company Name	Address	Manage
Aspen ABC Oil	123 Demo Street Busy City, Colorado ATATAT,US	Delete

1 Result

Customers

Please select all companies to whom your company supplies Program Eligible Material. Include customers who are resellers only, do NOT include end users.

Search for a business:

Company Name	Address	Manage
California CDE Oil	100 Mt Wilson Circle Road Mt Wilson, California 91023,US	Delete

1 Result

Suppliers

Please select all companies who supply your business with Program Eligible Materials.

Search for a Business

Company Name	Address	Manage
Aspen ABC Oil	123 Demo Street Busy City, Colorado ATATAT,US	Delete

1 Result

Customers

Please select all companies to whom your company supplies Program Eligible Material. Include customers who are resellers only do NOT include end users.

Search for a Business

Company Name	Address	Manage
California CDE Oil	100 Mt Wilson Circle Road Mt Wilson, California 91023,US	Delete

1 Result

Suppliers/Customers

Displays all companies that supply or purchase program eligible materials to or from the Member/Participant. Users can also add additional Suppliers and Customers within the registered jurisdiction.

Account Balance/Invoices Tab

The Account Balance/Invoices tab displays pertinent financial information for this specific state/program

The screenshot displays the 'Account Balance/Invoices' tab for Colorado AA Products Inc. (Registration #: PR-00000506). The page is divided into several sections:

- Program Account Balance:** Shows a balance of \$766.70. A note states: "The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied."
- Program Statements:** A table with columns: Statement Name, Created Date, Statement Amount, and Manage. It lists two statements: "2024-08-15 Statement of Account" (Aug 15, 2024, \$0.00) and "2024-07-15 Statement of Account" (Jul 15, 2024, \$52,012.37).
- Invoices:** A table with columns: Invoice Number, Invoice Name, Amount, Invoice Date, Status, and Manage. It shows one invoice: "00000189" for "AA Products Inc. Apr 2024 - Jun 2024" with an amount of \$52,012.37, dated July 4, 2024, and status "Paid".
- Payments and Refunds:** A table with columns: Transaction Number, Reference Number, Type, Amount, and Date. It shows one payment: "T-0000012" with reference number "RN000182", type "Payment", amount "\$52,012.37", and date "June 16, 2024".

At the bottom, there is a footer with "The Vault LPMA" logo, a "Privacy Policy" link, and contact information: "Contact Us Email: info@interchange360.com Create a Support Case". A small note at the very bottom reads: "Interchange 360 is the trade name for the Lubricants Packaging Management Association (LPMA)."

Program Account Balance

This is the total of Invoices - Payments and Refunds

Program Statements

Monthly generated snapshot in time of the amount a Member/ Participant owes LPMA (or, in some instances, that LPMA owes to a Member/ Participant). It also includes any delinquent reports or invoices.

Invoices

Fees generated automatically or manually by LPMA that can be associated with a submitted Report, a penalty, etc. These are associated with an Account over time.

Payments and Refunds

Transactions (payment and refunds) associated with an Account over time.

Viewing a Program Account Statement

The details of each Program Statement can be accessed by clicking the View button on the Program Statements table

The screenshot shows the account dashboard for Colorado AA Products Inc. (Registration #: PR-00000506). The Program Account Balance is \$766.70. Below this is a table of Program Statements:

Statement Name	Created Date	Statement Amount	Manage
2024-08-15 Statement of Account	Aug 15, 2024	\$0.00	View
2024-07-15 Statement of Account	Jul 15, 2024	\$52,012.37	View

A green arrow points from the 'View' button in the second row of the table to the right-hand screenshot.

The screenshot shows the 'Program Statement' page for Colorado AA Incorporated Inc. (Registration #: CO-00000419). A yellow arrow points to the 'Generate PDF' button in the top right corner. The page displays the following sections:

- Program Statement:** September 11, 2025. Program Balance As Of September 11, 2025: \$308.20.
- Payments and Refunds:** Table with columns: Transaction Number, Reference Number, Type, Date, Amount. Results include a payment of \$22.96 and a refund of \$1.00.
- Outstanding Invoices:** Table with columns: Invoice Number, Invoice Name, Invoice Date, Due Date, Amount. Result: \$81.20 due on September 10, 2025.
- Outstanding Reports:** Table with columns: Report Name, Type, Due Date. Results: Report due September 10, 2025.
- Available payment options:** Remittance and payments are due 30 days following the close of the related reporting period.

Generate PDF:
Download the invoice as a PDF from The Vault.

Program Statements

Program Statements are generated on a monthly basis and give the Member/Participant a snapshot of activities that took place within that period of time, and any outstanding obligations that may exist for that Program Registration.

The screenshot shows a program statement for AA Incorporated Inc. with the following sections:

- Program Statement:** September 11, 2025. AA Incorporated Inc., 2300 Steele St, Denver, Colorado 80202, United States. PROGRAM NAME/REGISTRATION NUMBER: Colorado ICD-00000419. Program Balance As Of September 11, 2025: \$308.20.
- Payments and Refunds:** Reflects payments and refunds that have been issued to your account between August 1, 2025 to August 31, 2025. Table with 5 columns: Transaction Number, Reference Number, Type, Date, Amount. Data: 1.000000069 (Payment, \$23.96), 1.000000077 (Refund, \$1.00).
- Outstanding Invoices:** Our records indicate that you have the following outstanding invoices. Please remit payment as soon as possible to avoid potential additional charges. Table with 5 columns: Invoice Number, Invoice Name, Invoice Date, Due Date, Amount. Data: 00000729 (AA Incorporated Inc. Jan 2025 - Mar 2025, \$81.20).
- Outstanding Reports:** Our records indicate that you have the following delinquent reports. Please submit these as soon as possible. Table with 3 columns: Report Name, Type, Due Date. Data: Jun 2025 - Aug 2025 (Report, Sep 10, 2025), Apr 2025 - Jun 2025 (Report, Sep 10, 2025).
- Available payment options:** Remittance and payments are due 30 days following the close of the related reporting period. Late payments will incur an interest charge of 1.5% per month.
- Accepted methods of payment are EFT/ACH.**
- Beneficiary Name:** Lubricants Packaging Management Association. Bank Name: Bank of America. Bank Address: 1301 Queen Anne Ave, Seattle, WA 98109. Beneficiary Account Number: 1381 3479 8745. Beneficiary ACH/Routing Number: 120000024.

Payments and Refunds

This displays all Payments and Refunds made towards the account during the statement period

Outstanding Invoices

A summary of Invoices that have not yet been paid

Outstanding Reports

A summary of Reports that have not yet been submitted

Viewing an Invoice

The details of each invoice can be viewed directly from The Vault.

The screenshot shows the 'The Vault' interface for Colorado AA Products Inc. (Registration # PR-00000504). The 'Account Balance/Invoices' section displays a program account balance of \$766.70. Below this, there are sections for 'Program Statements' and 'Invoices'. The 'Invoices' table shows one invoice from AA Products Inc. for \$52,012.37, dated July 4, 2024, with a 'View' button highlighted by a green box. A green arrow points from this 'View' button to the second screenshot.

Statement Name	Created Date	Statement Amount	Manage
2024-06-15 Statement of Account	Aug 15, 2024	\$0.00	View
2024-07-15 Statement of Account	Jul 15, 2024	\$52,012.37	View

Invoice Number	Invoice Name	Amount	Invoice Date	Status	Manage
00000189	AA Products Inc. Apr 2024 - Jun 2024	\$52,012.37	July 4, 2024	Paid	View

The screenshot shows the 'Invoice' details page for the same invoice. A yellow box highlights the 'Generate PDF' button, with a yellow arrow pointing to the text 'Generate PDF: Download the invoice as a PDF from The Vault.' The page displays invoice metadata, a 'Sales Data' table for Motor Oils, Aerosols, and Coolants, and available payment options.

Product	FCPL/MaxVol	FCPL%	Units	Gallons	Rate	Fees/Dues
1 Hve	<input checked="" type="checkbox"/>	0-25%	100	12.5	\$ 0.56 / gal	\$7.00
3 Hve	<input type="checkbox"/>	0-25%	100	12.5	\$ 0.56 / gal	\$7.00
Total			25			\$14.00

Generate PDF:
Download the invoice as a PDF from The Vault.

Invoice

Invoices are generated based on the data that was submitted as part of a Report. See Training Materials #3 for details on how and when invoices are generated. The Invoice page on the Vault shows the user what they how, and how to pay.

Colorado
AA Products Inc.
Registration #: CO-0000007

Invoice

Lubricants Packaging Management Association (LPMA)
1121 Broadway Street, Suite 100
Palo Alto, CA
94304-1121

800 80
AA Products Inc
1121 Broadway
San Francisco, California
94103
Program Name/Registration Number
California (CA-00000000)

Invoice Number
00001913
Total Invoice Amount
\$2,400.00
Sales Total
\$2,400.00
Tax
\$0.00

Invoice Name
AA Products Inc. Apr 2025 - Jun 2025
Invoice Type
Single Period Invoice
Invoice Period
August 9, 2024 at 6:55AM

Sales Data

Motor Oils

Product	PCPS/Actual	PCPS	Units	Gallons	Rate	Fees/Chgs
1 line	0	0.25%	100	12.5	\$ 0.56 / gal	\$7.00
1 line	0	0.25%	100	12.5	\$ 0.56 / gal	\$7.00
tax			25			\$14.00

Aerocoils

Product	PCPS	Units	Rate	Fees/Chgs
Auto Changer	0.25%	100	\$ 0.56 / unit	\$56.00
tax		100		\$56.00

Coolants

Product	PCPS	Units	Gallons	Rate	Fees/Chgs
1 line	0.25%	100	12.5	\$ 0.56 / gal	\$7.00
1 line	0.25%	100	12.5	\$ 0.56 / gal	\$7.00
tax		25			\$14.00

Available payment options:
Payment is due on X.
Bills and payments are due 30 days following the close of the related reporting period. Late payments will incur an interest charge of 1.5% per month.
All remittance advice should be sent to accounting@interchange360.com

Accepted methods of payment and EFT/ACH.
Beneficiary Name: Lubricants Packaging Management Association
Bank Name: Bank of America
Bank Address: 1301 Queen Anne Ave, Seattle, WA 98109
Beneficiary Account Number: 108 3476245
Beneficiary ACH/Routing Number: 12000024

The Vault
Privacy Policy
Contact Us
Email: info@interchange360.com
Create a Support Case

Invoice Details

Summary information of the billed customer, invoice name, due date and total amounts

Sales Data

Summary of the invoice line items, grouped by Product reporting category

Available Payment Options

Instructions for the user on how to make a payment towards this invoice, and any other applicable invoicing terms



Manage Users

Members/Participants can use this functionality to add/manage the access that other users in their organization can have to The Vault

Manage Users Model

The Manage Users functionality in The Vault enables Members/Participants to manage the users that have the ability to access the portal on their behalf. These users are tagged to a department(s), for which they can receive targeted communication.

Roles	Assigned By	Can Register for New Programs?	Can Add New Users?	Can Edit Existing Users?	Can Deactivate Existing Users?	Role Can Be Updated By
Account Administrator	By default, to the user who created the Account (or has been assigned the role during data migration).	Yes	Yes	Yes	Yes	LPMA
Program Administrator	By the Account Admin to one of the Programs that the Account is registered for.	No	Yes <i>(within assigned program)</i>	Yes <i>(within assigned program)</i>	Yes <i>(within assigned program)</i>	Account Admin

Departments: Users can be attributed to one or multiple Departments within the registered Programs, allowing them to receive targeted communications. These users cannot manage other users. Available departments are Finance, Operations, Administration, Legal, Marketing, and Environmental/Sustainability.

Manage Users in The Vault

From the Navigation Menu, Members/Participants can access the Manage Users landing page by clicking on “Manage Users”.

The screenshot displays the 'The Vault' LPMA user interface. At the top left, the logo 'The Vault LPMA' is visible. The user's name 'Benji Butchart' is shown in the top right corner. A navigation menu is open, listing 'Program Dashboard', 'Manage Users', 'My Communications', 'My Support Cases', and 'Logout'. The 'Manage Users' option is highlighted with a green box. Below the navigation menu, the user's organization details are shown: 'Colorado AA Products Inc. Registration #: PR-00000506'. The 'Reporting' section includes tabs for 'Reporting', 'Registration Information', and 'Account Balance/Invoices'. The 'Program Account Balance' is displayed as '\$766.70'. Below this, a 'Reports' section features a search bar and a 'Filter' button. A table of reports is shown with columns for Report, Report Type, Due Date, Status, and Manage.

Report	Report Type	Due Date	Status	Manage
Apr - Jun 2024	Report	September 1, 2024	Submitted	View ...

Navigation Menu:

- **Program Dashboard:** Allows users to access the Program Selection page to register in a new Program and access all their registered Programs.
- **Manage Users:** Only visible for Account and Program Admins, this allows for managing which users can access The Vault on their organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** Users can view their submitted Support Cases and check the status.

Manage Users: Landing Page

Upon selecting “Manage Users” from the Navigation Page, the user will be redirected to the Manage Users landing page.

Active Users:

Shows active users within the Account.

Inactive Users:

When a user's access is deactivated, they are moved to the *Inactive Users* tab.

Add a User:

Account or Program Administrators can add a new user to assist in managing the account.

Manage Options:

Account or Program Administrators can edit access or deactivate active users.

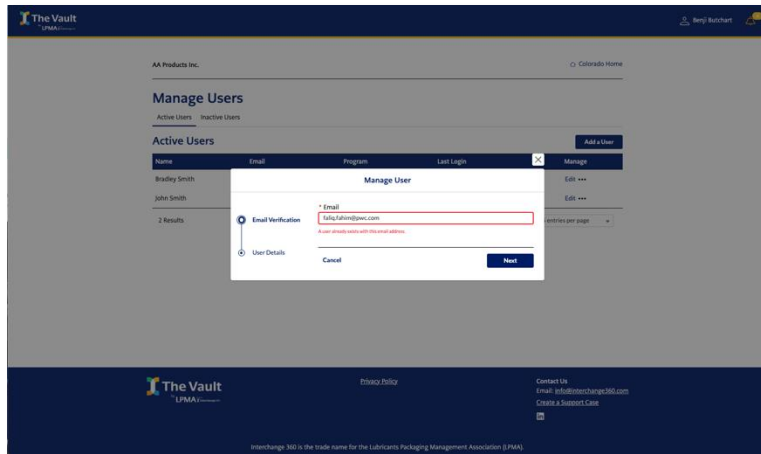
The screenshot displays the 'Manage Users' page within 'The Vault LPMA' interface. At the top, the user 'Benji Butchart' is logged in. The page title is 'BB Processor Services' with a 'Program Home' link. Below the title are two tabs: 'Active Users' (selected) and 'Inactive Users'. A table titled 'Active Users' contains one entry for 'Jessica Battersea'. The table has columns for Name, Email, Program, Last Login, and Manage. The 'Manage' column for Jessica Battersea has 'Edit' and 'Deactivate' links. An 'Add a User' button is located to the right of the table. The footer includes 'The Vault LPMA' logo, 'Privacy Policy', 'Contact Us' (with email 'info@interchange360.com' and a 'Create a Support Case' link), and a LinkedIn icon. A small note at the bottom states 'Interchange 360 is the trade name for the Lubricants Packaging Management Association (LPMA)'.

Name	Email	Program	Last Login	Manage
Jessica Battersea	jessica.battersea@pwc.com	California, Colorado	January 6, 2025	Edit Deactivate

Adding a New User to The Vault

Account and Program Administrators can manage user access to The Vault for their business. They can add, edit or deactivate users. To add a user, the Account or Program Admin begins by clicking “Add a User” and entering the new user’s email address.

There are **three scenarios** when adding a User:



1. User does not exist in The Vault

- If the entered email address is not found, the administrator can continue to enter in the contact details for that new user and send them a registration email.

2. User already has a Vault login for this organization

- If the entered email matches an existing contact within the same account, the system will navigate the admin directly to the Edit modal. No new registration email is sent.

3. User already has a Vault login, but for a different organization

- If the entered email matches one associated with a different account, an error message will be displayed indicating that the email is already in use, and the administrator cannot proceed with adding this user. A different email address must be entered to continue.

Adding a New User to The Vault

Once the user's email is populated, the Member/Participant can enter the new user's contact information as well as define the Program(s) they wish to enroll them in and assign them to a specific Department(s) per Program.

Manage User

✓ Email Verification
● User Details

Email
bradley.smith@pwc.com

* First Name * Last Name

* Title

* Business Phone Phone Extension

Program

California
Colorado

California Department(s)

- Program Admin
- Finance
- Operations
- Administration
- Legal
- Marketing
- Environmental/Sustainability

* I hereby authorize this user to create/modify data

Previous Cancel Save

Departments:

The Account Admin or Program Admin can assign Department(s) to the user.

Note: Multiple Departments can be assigned to one user and Different Departments can be assigned per user per Program. This is where a user can also be assigned the Program Admin access level. Program Admin access allows the user to manage other users within this Program.

Attestation:

The Account or Program Admin has to check the attestation box to authorize the new user to create or modify data.

Deactivating a User

The **Account Admin** or users with the **Program Admin** department assigned can disable a user's access to The Vault by clicking on the "Deactivate" button in the Manage column of the Active Users table. This moves the user to the Inactive tab.



Manage Users

Active Users Inactive Users

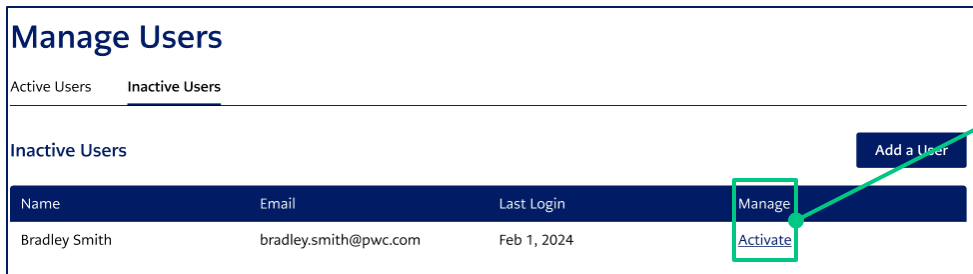
Active Users Add a User

Name	Email	Program	Last Login	Manage
Bradley Smith	bradley.smith@pwc.com	California, Colorado	January 6, 2025	Edit Deactivate

1 Result 5 entries per page

Deactivate User:

Account Admin or Program Admin can deactivate a user's access to The Vault by using the "Actions" button from the **Active Users** table. This will move the user to the **Inactive Users** table. The user will not receive any notifications.



Manage Users

Active Users Inactive Users

Inactive Users Add a User

Name	Email	Last Login	Manage
Bradley Smith	bradley.smith@pwc.com	Feb 1, 2024	Activate

Reactivate User:

To restore access, find the user in the **Inactive Users** table and click 'Activate'. They must then be re-assigned to their applicable department(s). This will move the user to **Active Users** table. The user will receive a notification.



Communications

Users will receive targeted communications based on the departments they are tagged to in their registered Programs. Communications are either emails or new bell notifications that display in The Vault to alert a Member/Participant of a pending action item.

Accessing the Communications Centre in The Vault

From the Navigation Menu, Members/Participants can access the Communications Centre by clicking on “My Communications”.

The screenshot shows the 'The Vault' LPMA interface. At the top left is the logo. The user is logged in as 'Benji Butchart'. A navigation menu is open on the right, listing: Program Dashboard, Manage Users, My Communications (highlighted in green), My Support Cases, and Logout. The main content area shows the user's profile: Colorado AA Products Inc., Registration #: PR-00000506. Below this are tabs for Reporting, Registration Information, and Account Balance/Invoices. The 'Reporting' tab is active, showing a 'Program Account Balance' of \$766.70. A note states: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied.' Below the balance is a 'Reports' section with a search bar and a 'Filter' button. A table lists reports with columns: Report, Report Type, Due Date, Status, and Manage.

Report	Report Type	Due Date	Status	Manage
Apr - Jun 2024	Report	September 1, 2024	Submitted	View ...

Navigation Menu:

- **Program Dashboard:** Allows users to access the Program Selection page to register in a new Program and access all their registered Programs.
- **Manage Users:** Only visible for Account and Program Admins, this allows for managing which users can access The Vault on their organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** Users can view their submitted Support Cases and check the status.

The Communications Center

Emails that have been sent as part of a mass mailing (either via Campaign or via a List View) will be made accessible to the User via the Communications Center. By clicking View the user will be shown a web version of the communication sent.

The screenshot shows the 'The Vault LPMA' interface. At the top left is the logo, and at the top right is the user name 'Benji Butchart'. Below the header, there is a breadcrumb 'AA Products Inc.' and a link 'Colorado Home'. The main heading is 'Communications Center'. Underneath is a search bar with the placeholder 'Enter search terms here' and a 'Filter' button. A table lists communications with columns for 'Received On', 'Subject', and 'Manage'. The table contains two entries: one from September 9, 2025, and another from June 9, 2025. Below the table, it shows '2 Results' and a dropdown for '5 entries per page'. The footer contains the logo, a 'Privacy Policy' link, and 'Contact Us' information including an email address and a 'Create a Support Case' link.

Received On	Subject	Manage
September 9, 2025 at 02:29 PM	September Newsletter	View
June 9, 2025 at 02:27 PM	June Newsletter	View

Summary of Automated Communications (Part 1 of 2)

Communication	Notifications		Frequency	Departments Sent To			
	Email	Portal Bell					
Welcome to the Vault	✓	✗	Once - after Account Creation	✓	Account Admin	✓	Marketing
				✓	Program Admin	✓	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.
Reset Password	✓	✗	Once - after Account Creation	✓	Account Admin	✓	Marketing
				✓	Program Admin	✓	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.
Verification Code	✓	✗	Once - after Account Creation	✓	Account Admin	✓	Marketing
				✓	Program Admin	✓	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.
Report is Ready To Be Completed	✓	✓	Once - after Report generation	✓	Account Admin	○	Marketing
				✓	Program Admin	○	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.
Report is Due in 5 Days	✓	✓	Once - Five (5) days before the Report due date	✓	Account Admin	○	Marketing
				✓	Program Admin	○	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.
Report is Past Due	✓	✓	Day that the Report becomes delinquent and every fifteen (15) business days after the due date; ends when the Report is successfully submitted.	✓	Account Admin	○	Marketing
				✓	Program Admin	○	Legal
				✓	Finance	✓	Administration
				✓	Operations	✓	Env/ Sust.

Summary of Automated Communications (Part 2 of 2)

Communication	Notifications		Frequency	Departments Sent To							
	Email	Portal Bell		Account Admin	Program Admin	Finance	Operations	Marketing	Legal	Administration	Enviro/Sustain
Report Adjustment is Initiated by LPMA	✓	✓	Once - after the Report Adjustment has been created by LPMA.	✓	✓	✓	✓	○	○	✓	○
Report is Rejected	✓	✓	Once - after a Report Adjustment or FRR has been <i>rejected</i> by LPMA.	✓	✓	✓	✓	○	○	✓	○
Report is Approved	✓	✓	Once - after a Report Adjustment or FRR has been <i>approved</i> by LPMA.	✓	✓	✓	✓	○	○	✓	○
Invoice is Generated	✓	✓	After invoice is moved to Payable	✓	✓	✓	✓	○	○	✓	○
Invoice is Past Due	✓	✓	Day that the invoice becomes delinquent and every fifteen (15) business days after the due date; ends when the invoice is marked as paid.	✓	✓	✓	✓	○	○	✓	○
Program Registration is Approved	✓	✓	After a Program Registration has been moved to 'Active' by LPMA.	✓	○	○	○	○	○	○	○



Support Cases

Members/Participants can access support from LPMA directly from The Vault by creating a support case. They can also track the status of their cases on the Support Cases landing page.

Accessing Support Cases in The Vault

Members/Participants can access current or historic Support Cases by clicking on “My Support Cases” from the menu.

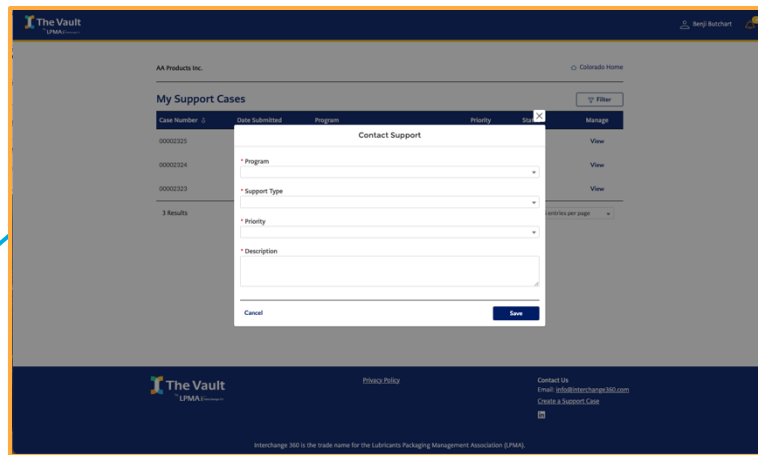
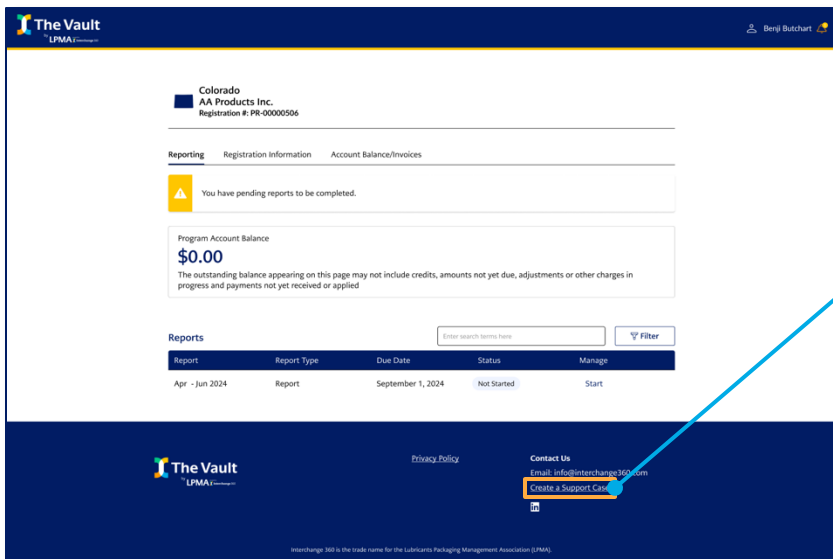
The screenshot shows the 'The Vault' LPMA interface. At the top left is the logo. The user is logged in as 'Benji Butchart'. A navigation menu is open on the right, listing: Program Dashboard, Manage Users, My Communications, My Support Cases (highlighted with a green box), and Logout. The main content area shows the user's profile for 'Colorado AA Products Inc.' with registration number 'PR-00000506'. Below this are tabs for 'Reporting', 'Registration Information', and 'Account Balance/Invoices'. The 'Reporting' tab is active, displaying a 'Program Account Balance' of '\$766.70'. A note below the balance states: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied'. At the bottom, there is a 'Reports' section with a search bar and a 'Filter' button. A table below shows a report for 'Apr - Jun 2024' with a 'Report Type' of 'Report', a 'Due Date' of 'September 1, 2024', and a 'Status' of 'Submitted'. A 'View' link and a three-dot menu are also present.

Navigation Menu:

- **Program Dashboard:** Allows users to access the Program Selection page to register in a new Program and access all their registered Programs.
- **Manage Users:** Only visible for Account and Program Admins, this allows for managing which users can access The Vault on their organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** Users can view their submitted Support Cases and check the status.

Creating a Support Case

Users can request help from LPMA by creating a ticket (a Support Case) in The Vault from the “Create a Support Case” link that is accessible from the footer throughout The Vault.



Creating a Case:

Users select the Program, Support Type, Priority, and provide a description of their support request. This is sent directly to LPMA.

My Support Cases in The Vault

By clicking on “My Support Cases” in the Navigation Menu, the *My Support Cases* page is displayed. This allows users view details of the submitted Support Cases, including its Status.

The Vault
LPMA

AA Products Inc. Colorado Home

My Support Cases

[Filter](#)

Case Number	Date Submitted	Program	Priority	Status	Manage
00002131	August 28, 2025	Colorado	High	Open	View

1 Result 5 entries per page

The Vault
LPMA

Privacy Policy

Contact Us
Email: info@interchange360.com
[Create a Support Case](#)

Interchange 360 is the trade name for the Lubricants Packaging Management Association (LPMA).

Case 00002131

Status: Open

Program: Minnesota

Support Type: Reporting

Priority: Medium

Description: I don't see my July 2025 Report on the Reporting Tab

Date Submitted: August 28, 2025 at 03:58 PM