

CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering sales material

IMPORTANT



Please remember: You cannot order sales materials and marketing material in the same order

STEP 1

To begin, log into <https://custompoint.rrd.com>

- › Enter your **User ID** which is your Agent Number, Writing Number, or Agency ID (i.e. "B123456")
- › Your **NEW Password is Health1!** (Exclamation point after the "1" and password is case sensitive)
- › Then enter **hspring** (not case sensitive) in the Account field and click **Login**

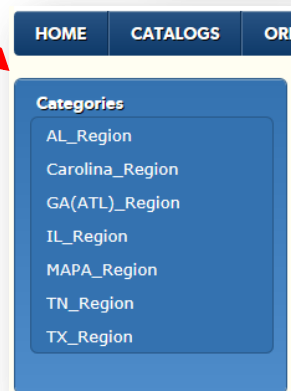


NOTE: Do not use your browser's   buttons. If you need to go back, use the navigation prompts available on most pages throughout the site, or select the CATALOGS pulldown menu and begin again. You can also select the "home" button to start a new order.

STEP 2

Mouse over **Catalogs** and in the dropdown, select **Sales Materials**

- › In the blue banner on the left, choose Lock In or AEP appropriately
- › Select your state or region from the list that appears
- › For this example we'll click the region category **TN_Region** and then the document **Sales_Kit_Book**



CUSTOMPOINT SALES AND MARKETING MATERIAL

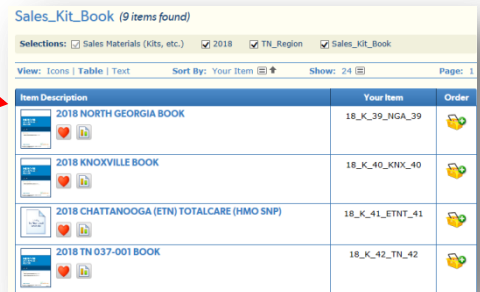
Ordering sales material

STEP 3

A list of items appears in the center window

For this example, let's choose to view that list in the **Table View**

- › If you prefer, you can select the **Icon** or **Text** view instead
- › If you don't see the product you need on your screen, click the **Show** icon to see additional items from your list
- › When you find the Sales Book you wish to order, click the shopping cart inside the **Order** column to add it to your shopping cart
- › A pop-up will appear to confirm that the item is now part of your order



Sales_Kit_Book (9 items found)

Selections: ☐ Sales Materials (Kits, etc.) ☒ 2018 ☒ TN_Region ☒ Sales_Kit_Book

View: ☒ Icons ☒ Table ☐ Text Sort By: Your Item Show: 24 Page: 1

Item Description	Your Item	Order
2018 NORTH GEORGIA BOOK	18_K_39_NGA_39	
2018 KNOXVILLE BOOK	18_K_40_KNOX_40	
2018 CHATTANOOGA (ETN) TOTALCARE (HMO SNP)	18_K_41_ETNT_41	
2018 TN 037-001 BOOK	18_K_42_TN_42	

STEP 4

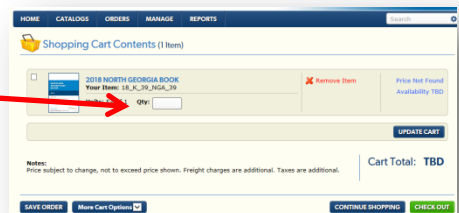
To add additional items click **Stay Here** and repeat the process

- › If you have finished ordering, click **View Cart**

STEP 5

When the **Shopping Cart Contents** window appears, enter your desired quantities and carefully check your order

- › If you need to remove or update an item, click **Update Cart** before you select **Check Out**



Shopping Cart Contents (1 item)

	2018 NORTH GEORGIA BOOK Your Item: 18_K_39_NGA_39	Remove Item	Price Not Found Availability TBD
--	--	-------------	-------------------------------------

Qty:

Update Cart

Notes: Price subject to change, not to exceed price shown. Freight charges are additional. Taxes are additional.

Cart Total: TBD

SAVE ORDER More Cart Options CONTINUE SHOPPING CHECK OUT

Maximum Quantities – must click on “update cart” to do this: **Agents 20 | GAs 100 | FMOs 300**

ATTENTION FMO's & GA's

You may order Sales Books for only ONE region at a time. For example, if you place an order for the TN region, only TN materials may be ordered. If other regions appear in your cart, your order will be canceled. *Please order in multiples of 10 and only what you really need.*

CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering sales material

STEP 6

When the **Delivery Options** screen appears, click the **Your Personal Address Book** drop-down and select **Manually Enter Address**

HOME | CATALOG | ORDERS | MANAGE | REPORTS | CONFIGURE

Delivery Options Step 1 of 3

Address Source: Your Personal Address Book

Search Personal Address Book:

Search: Select One

Addresses Found:

- Julie Fawcett
350 Great Circle Rd, Nashville, TN, 37226 USA
- Julie Fawcett
350 Great Circle Rd, Nashville, TN, 37226 USA

SAVE ORDER CANCEL BACK NEXT

STEP 7

Then enter the **Ship To Name, Company Name** (which goes in the **Ship To Name 2** box) and **Address** in the fields listed

› Choose the **Bill To Address** from the dropdown menu (even if there is no charge) and complete the **Attention** line

› At the bottom, click **Validate** and then **Add to Address Book** to skip this step in the future.

› Now click **Next**

HOME | CATALOG | ORDERS | MANAGE | REPORTS | CONFIGURE

Delivery Options Step 1 of 3

Address Source: Manually Enter Address

Enter Address Here:

Ship To Name 1: Ship To Name 2:

Address Line 1: Address Line 2:

Address Line 3:

City: State: Zip:

Country: United States Phone:

Validate Add to Address Book Is Default Address

Bill To Address: Select a Bill To Address...

Attention To: Julie Fawcett

SAVE ORDER CANCEL BACK NEXT

STEP 8

Fill in your **Name, Phone Number** and **Email Address** and then choose **Cost Center** you are associated with from the dropdown menu and click **Next**

Note: All orders are shipped UPS Ground delivery and usually arrive within 3 days.

HOME | CATALOG | ORDERS | MANAGE | REPORTS | CONFIGURE

Order Details Step 2 of 3

Customer Information:

Name: Julie Fawcett Phone Number: 6155555555

Email Address: Julie.Fawcett@HealthTraining.com

Shipping Information:

Carrier/Service Level: Standard Shipping Method

Order Information:

Cost Center: 00000000000000000000

SAVE ORDER CANCEL BACK NEXT

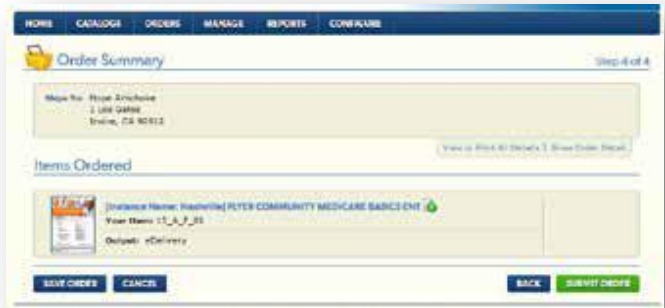
CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering sales material

STEP 9

Review the order and click **Submit Order**

› The **Order Confirmed** screen will appear with your **Sales Reference Number** followed immediately by an email confirming the transaction



STEP 10

To check the status of your order, mouse over **Orders** (found on the top blue menu bar) and select **Order Status** from the dropdown menu

› There you'll be able to order search, including the UPS tracking of your order.

When will my order get processed? After your market management approves the order:

- › Orders approved prior to noon EST are processed for shipping the same business day.
- › Orders approved after noon EST are processed for shipping the following business day.

CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering marketing material

IMPORTANT

Please remember:



1. You cannot order sales kits and marketing materials in the same order
2. You cannot order printed material and e-delivery material in the same order

STEP 1

To begin, log into <https://custompoint.rrd.com>

- › Enter your **User ID** (your Agent Number, Writing Number, or Agency ID)
- › Your **Password is Health1!** (Exclamation point after the “1” and password is case sensitive)
- › Enter **hspring** (not case sensitive) in the Account field and click **Login**



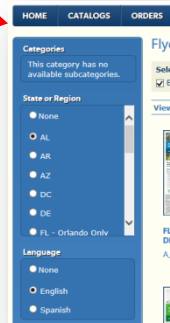
NOTE: Do not use your browser's   buttons. If you need to go back, use the navigation prompts available on most pages throughout the site, or select the Catalogs pull down menu and begin again. You can also select the “home” button to start a new order.

STEP 2

Mouse over **Catalogs** and in the dropdown, select **Marketing Materials**

› In the Blue Banner choose:

1. The appropriate category (AEP or Lock In)
2. The format of the material
(e-delivery = free PDF, Print = payment required)
 1. The type of material (Brochures, Cards, Flyers, etc.)
 2. The state or region you are marketing in
 3. The language you need (English or Spanish)



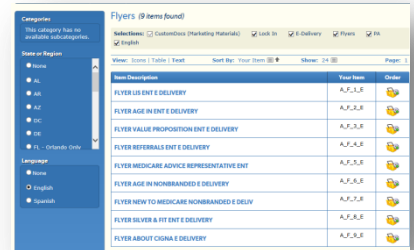
CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering marketing material

STEP 3

A list of items appears in the center window – depending on how you have set up your preferences, the list of items will appear as either **icons**, **table** or **text** – to change the view, click on each one

› For this example, let's choose **Flyer Age In Ent E Delivery**



Item Description	Your Item	Order
FLYER AGE IN ENT E DELIVERY	A_F_2_E	
FLYER AGE IN ENT E DELIVERY	A_F_2_E	
FLYER VALUE PROPOSITION ENT E DELIVERY	A_F_2_E	
FLYER REFERRALS ENT E DELIVERY	A_F_2_E	
FLYER MEDICARE ADVISE REPRESENTATIVE ENT	A_F_2_E	
FLYER AGE IN NONBRANDED E DELIVERY	A_F_2_E	
FLYER NEW TO MEDICARE NONBRANDED E DELIV	A_F_2_E	
FLYER DELIVER A FIT ENT E DELIVERY	A_F_2_E	
FLYER ABOUT CIGNA E DELIVERY	A_F_2_E	

STEP 4

IF YOU CHOSE E-DELIVERY IN STEP 2, the document will appear on your screen

- › Click on **Customize**, complete each field, then click **Next**
- › Review the proof (by clicking on the image) – if correct click **Ad to Cart** and **PROCEED TO STEP 5**



IF YOU CHOSE PRINT IN STEP 2, the pricing table and quantity you want will appear on your screen

- › Enter the quantity and click on **Customize**
- › Complete each field and then click on **Next**
- › Review the proof (by clicking on the image) – if correct click **Ad to Cart** and **PROCEED TO STEP 5**



Pricing By Quantity	Unit	Price
1 - 24	EA of 1	\$0.50
25 - 49	EA of 1	\$0.24
50 - 99	EA of 1	\$0.18
100 - 199	EA of 1	\$0.14
200 - 999,999,999	EA of 1	\$0.13

STEP 5

IF YOU CHOSE E-DELIVERY IN STEP 2:

- › Review your order. If you have no changes and you are done shopping, click **Check Out**
- › When the **Electronic File Delivery Destinations** window appears, check that your email address is correct. Click **Next** and proceed to Step 6

IF YOU CHOSE PRINT IN STEP 2:

- › Review your order. If you have no changes and you are done shopping, click **Check Out**



CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering marketing material

STEP 6

IF YOU CHOSE E-DELIVERY IN STEP 2 the **Delivery Options** window appears - click **Next**

- › If the address doesn't appear at the right side of the screen, go to **Address Source** at the left and choose **Manually Enter Address** from the dropdown menu – then click **Next**

- › In the **Bill to Address** field, select the sales office you are aligned with and click **Next**

- › In the **Cost Center** field, select the sales office you are aligned with and click **Next**

IF YOU CHOSE E-DELIVERY IN STEP 2 PROCEED TO STEP 7

IF YOU CHOSE PRINT IN STEP 2 CLICK ON NEXT AND PROCEED TO STEP 8

STEP 7

The **Order Summary** screen appears

Review the information on this screen,

click **Submit Order**, and you will receive the

Order Confirmed screen with your **Sales Reference #**

in the upper right corner

- › Expect to receive your order confirmation email immediately after placing your order
- › For E-delivery orders, your high-resolution PDF file will arrive within 2 hours by email

NOTE – THIS IS THE END OF THE E-DELIVERY PROCESS

CUSTOMPOINT SALES AND MARKETING MATERIAL

Ordering marketing material

STEP 8

- › When the **Order Details** screen appears, enter your credit card information in the **Billing Information Fields**
- › Choose the appropriate method of **Shipping**
- › In the **Cost Center** field, select the sales office you are aligned with and click **Next**
- › Review the order and click **Submit order**
- › The **Order Confirmed** screen will appear with your **Sales Reference #** followed immediately by an email confirming the transaction.

The screenshot shows the 'Order Details' screen for Cigna HealthSpring's 'Printing & Distribution Online' system. The page is titled 'Step 2 of 3'. It features a navigation bar with links: HOME, CATALOGS, ORDERS, MANAGE, REPORTS, and CONFIGURE. The main content area is divided into two columns. The left column contains 'Customer Information' (Name: Steve Haney, Phone Number: 810-295-2464, Email Address: Stephen.Haney@healthspring.com) and 'Billing Information' (Billing Method: Pay by New Credit Card, Card Holder Name, Card Type, Card Number, Expiration Date, Save Card for Future Orders, Email Receipt). The right column contains 'Order Information' (Cost Center: TH-7520-10530-671000). A 'Next' button is visible in the top right corner.

STEP 9

- To check the status of your order, mouse over **Orders** (found on the top blue menu bar) and select **Order Status** from the dropdown menu.
- › There you'll be able to accomplish many tasks, including the UPS tracking of your order.