

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**

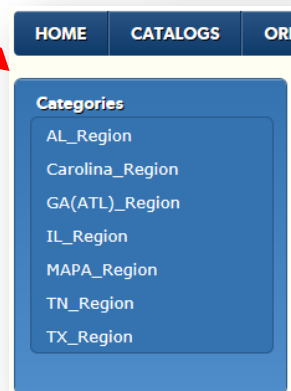


NOTE: Do not use your browser's   buttons. If you need to go back, use the navigation prompts available on most pages throughout the site, or select the CATALOGS pulldown menu and begin again. You can also select the "home" button to start a new order.

STEP 2

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

- › In the blue banner on the left, choose 2018 or 2019 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**



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STEP 3

A list of items appears in the center window

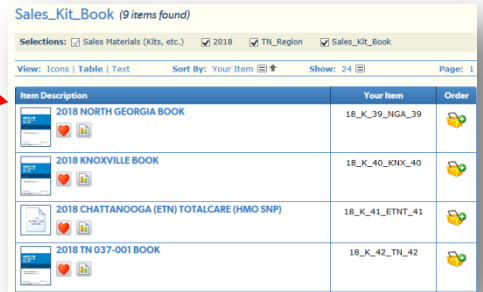
For this example, let's choose to view that list in the **Table View**

› 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



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

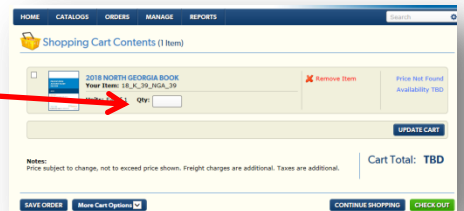
› If you have finished ordering, click **View Cart**

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**



Item	Qty	Remove Item	Price Not Found Availability TBD
2018 NORTH GEORGIA BOOK	<input type="text"/>		Price Not Found Availability TBD

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 UPDATE CART 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

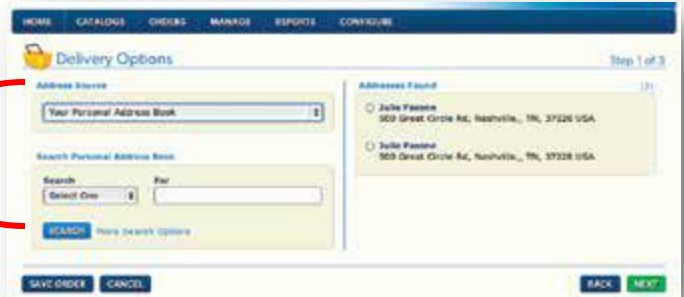
You may order Sales Books for only ONE region at a time. For example, if you place an order for the TN region, only TN materials may be ordered. If other regions appear in your cart, your order will be canceled. *Please order in multiples of 10 and only what you really need.*

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STEP 6

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



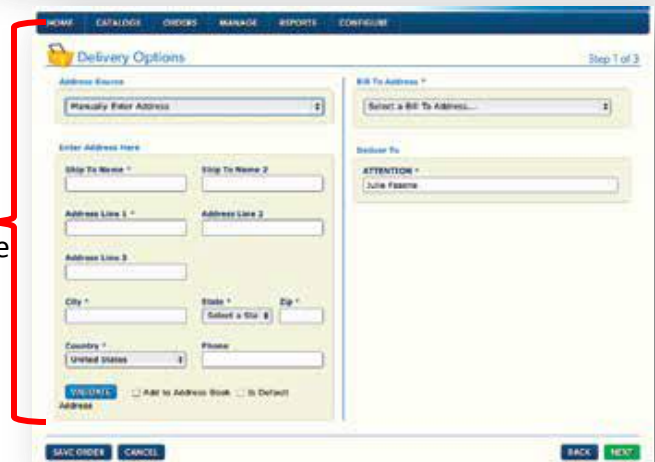
STEP 7

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**



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.



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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**



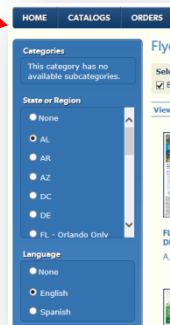
NOTE: Do not use your browser’s   buttons. If you need to go back, use the navigation prompts available on most pages throughout the site, or select the Catalogs pull down menu and begin again. You can also select the “home” button to start a new order.

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)



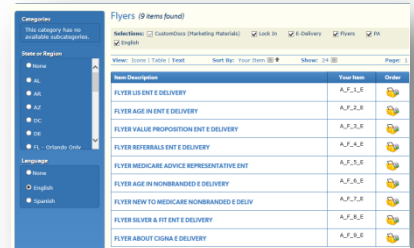
CUSTOMPOINT SALES AND MARKETING MATERIAL

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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 LIS 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 SILVER & 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**



Printing & Distribution Online

HOME CATALOGS ORDERS

Back To Results
FLYER AGE IN ENT E DELIVERY

Your Item: A_F_2_E

BASE INTO MEDICARE ADVANTAGE WITH PEACE OF MIND

Pricing By Quantity

Quantity	Unit	Price
Pricing information is currently not available.		

CUSTOMIZE



Printing & Distribution Online

HOME CATALOGS ORDERS

Back To Results
FLYER AGE IN ENT

Your Item: A_F_2

BASE INTO MEDICARE ADVANTAGE WITH PEACE OF MIND

Pricing By Quantity

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

Units: EA of 1 Quantity:

Select Units and Quantity **CUSTOMIZE**

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**

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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

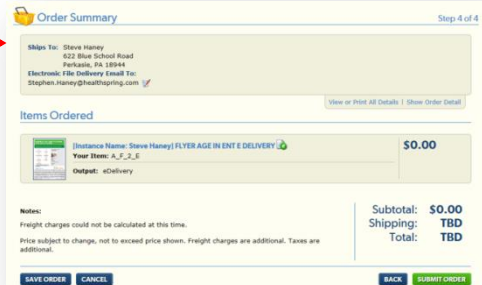
Order Confirmed screen with your **Sales Reference #**

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



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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 in the Cigna HealthSpring Printing & Distribution Online system. The page is titled 'Order Details' and is 'Step 2 of 3'. It features a navigation menu with 'HOME', 'CATALOGS', 'ORDERS', 'MANAGE', 'REPORTS', and 'CONFIGURE'. The main content area is divided into two columns: 'Customer Information' and 'Order Information'. The 'Customer Information' section includes fields for Name (Steve Haney), Phone Number (810-295-2464), and Email Address (Stephan.Haney@healthspring.com). The 'Order Information' section includes a Cost Center dropdown menu (TH-7920-10530-671000) and a 'Next' button. Below these sections is the 'Billing Information' section, which includes a Billing Method dropdown menu (Pay by New Credit Card), Card Holder Name, Card Type, Card Number, and Expiration Date. There is also a checkbox for 'Save Card for Future Orders' and an 'Email Receipt' checkbox.

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.