

# ORDERING 2016 SALES BOOKS AND CUSTOM DOCUMENTS

## Your Quick-Ref guide



Follow these steps to order your 2016 Sales Books and Custom Documents, but remember that **you cannot order Sales Books AND Custom Documents for Print/Ship delivery in the same transaction.**

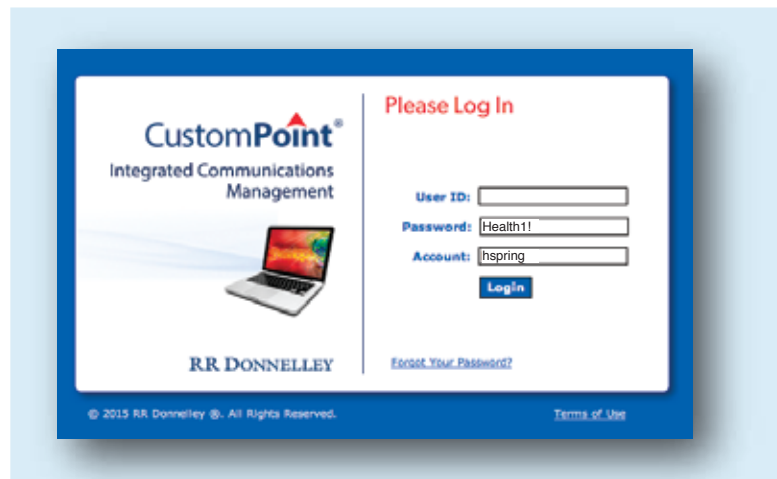
## ORDERING SALES BOOKS

### Step 1

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

- › Enter your **User ID** which is your Agent Number, Writing Number, or Agency ID (for example "B123456").
- › Your **NEW Password is Health!** (That's an exclamation point after the number "1" and the 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.



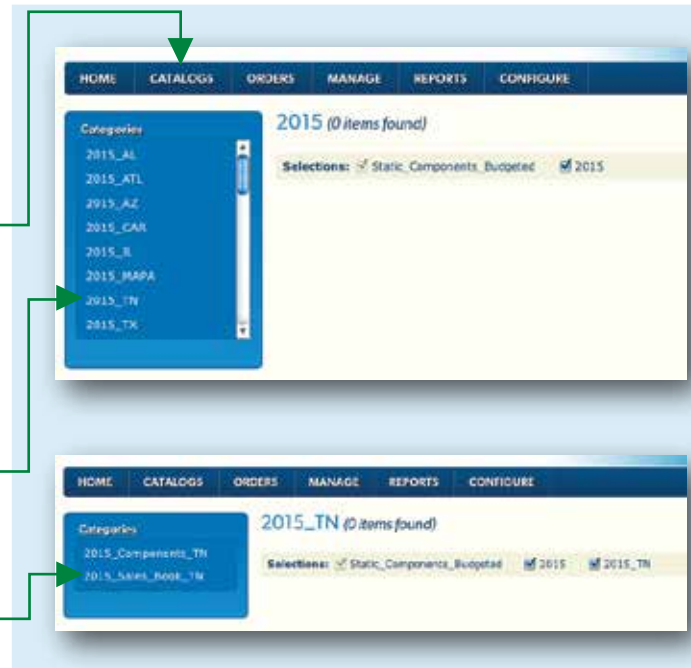
## Ordering Sales Books

(continued)

### Step 2

Mouse over **CATALOGS** and in the dropdown, select **Static\_Components\_Budgeted** (not shown here).

- › In the blue banner on the left, choose the appropriate year (not shown).
- › Select your region from the list that appears.
- › For this example we'll click the region category **2015\_TN** and then the document **2015\_Sales\_Book\_TN**.

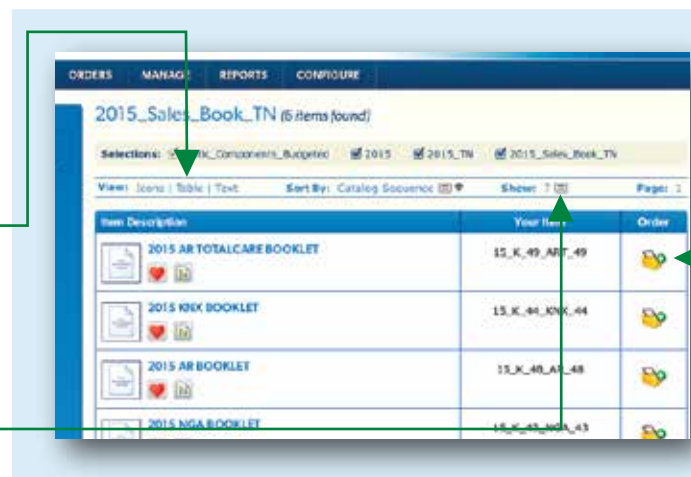


### Step 3

**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 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.



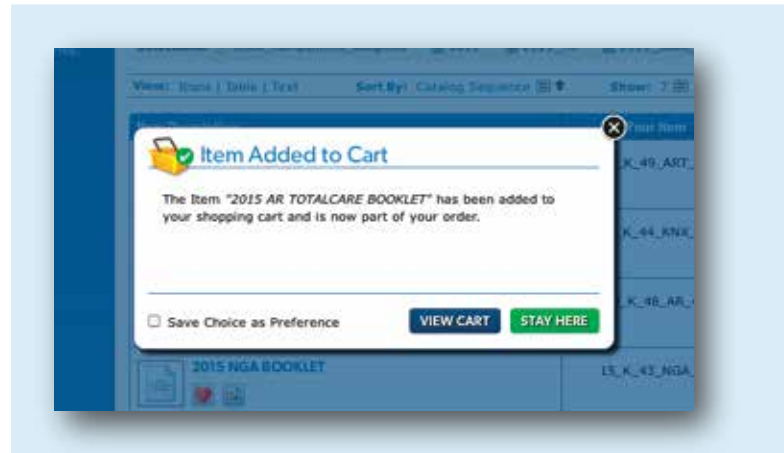
## Ordering Sales Books

(continued)

### Step 4

To add additional items click **STAY HERE** and repeat the process.

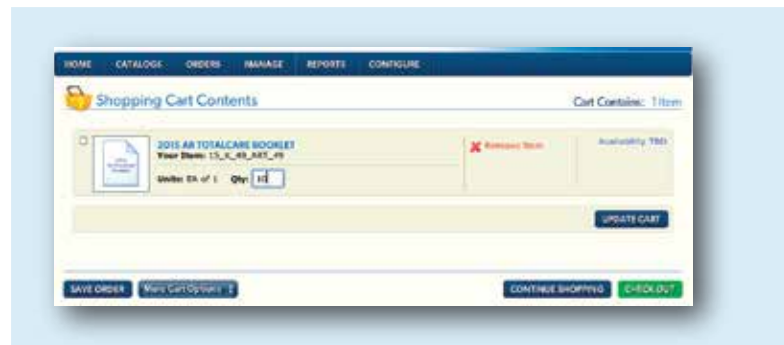
- › If you have finished ordering, click **VIEW CART**.



### Step 5

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

- › If you need to remove an item, click **UPDATE CART** before you select **CHECK OUT**.



### Maximum Quantities

<b>AGENTS</b>	20
<b>GAs</b>	100
<b>FMOs</b>	300

*Please order in multiples of 10 and only what you really need.*



### 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.

## Ordering Sales Books

(continued)

### 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 **Standard Shipping Method** from the dropdown menu. Click **NEXT**.

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

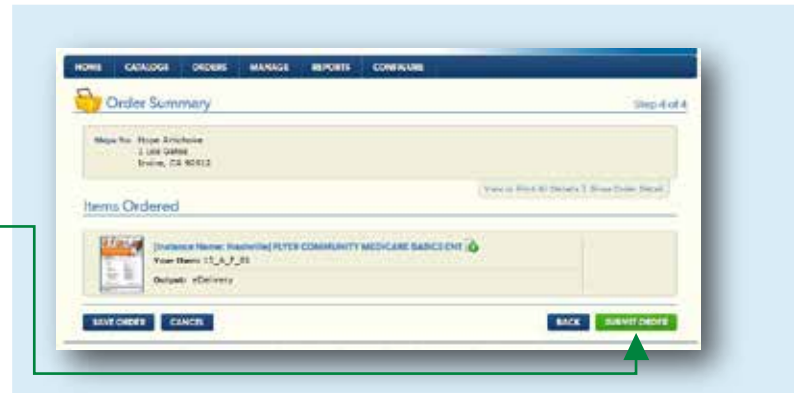
## Ordering Sales Books

(continued)

### Step 9

Review the order and click **SUBMIT ORDER**.

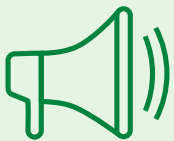
- › The **Order Confirmed** screen will appear with your **Sales Reference Number** followed immediately by an email confirming the transaction.



### 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 accomplish many tasks, including the UPS tracking of your order.



### When will my order get processed?

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

# ORDERING CUSTOM DOCUMENTS

## Step 1

Log into <https://custompoint.rrd.com>.

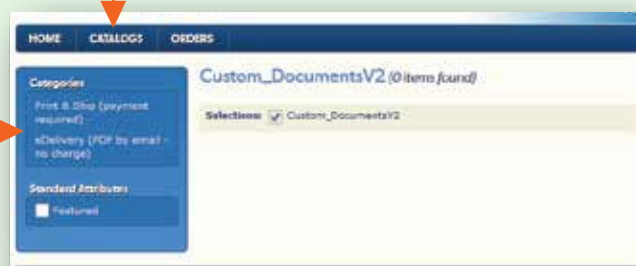
- › Enter your **User ID**
- › Your **Password** is **Health1!**
- › Now enter **Hspring** (not case sensitive) in the Account field and click **Login**.



## Step 2

Mouse over **CATALOGS** and select **Custom\_Documents**.

- › In the blue banner that appears, choose either **Print & Ship** to receive a quantity of printed copies (payment required) or **eDelivery** to receive a no-cost (\$0.00), high-resolution PDF file which can be used for local printing.





## Step 3

**Custom\_Documents** screen appears.

- › Next, select your document's category from the list that appears.
- › When you select that category, the center window populates with a list of available documents for you.



**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.

## Ordering Custom Documents

(continued)

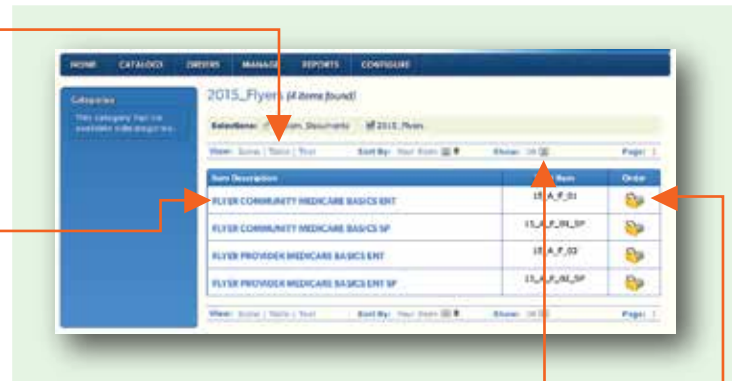
### Step 4

For this example, we'll choose to customize a Flyer (**Community Medicare Basics**).

We've selected the **Table View**.

› If you don't see the document you need on this screen, click the **SHOW** icon to see additional items from your list.

› When you find the document you wish to order, click inside the **ORDER** column.



### Step 5

The document will open on your screen.

› Complete the custom information for each field, following the suggested format prompts for entering your phone number, email, etc.

› Click **UPDATE PREVIEW** to check how your information appears on the document.

› Make any changes required and click **NEXT**.

## Ordering Custom Documents

(continued)

### Step 6

If you wish, you can download, print, or save a low-resolution version of your document by selecting **VIEW PDF PROOF**.

- › If your PDF proof is satisfactory, check **this box** and then click **ADD TO CART**.



### Step 7

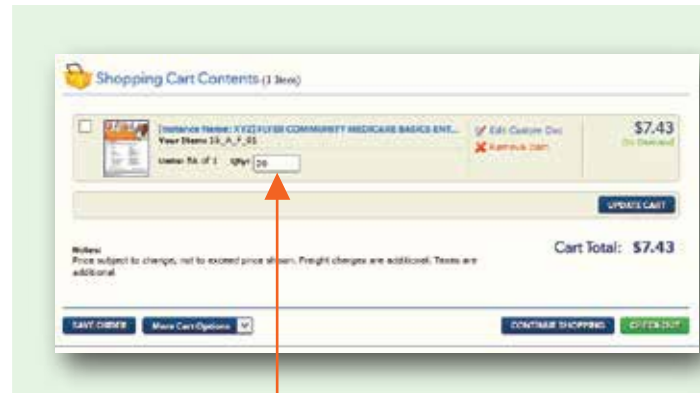
Your **Shopping Cart Contents** screen appears.

If you chose **eDelivery** in **Step 2**:

- › Review your order (screen not shown here). 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 8**.

If you chose **Print & Ship** in **Step 2**:

- › Enter your quantity of printed matter.
- › Review your order and click **CHECK OUT**.



### Step 8

The **Delivery Options** window appears (not shown here).

- › If the address doesn't appear at the right side of the screen, go to **Address Source** at the left.
- › Choose **Manually Enter Address** from the dropdown menu, and follow the instructions provided on Page 4 (Step 7) of this tool. Click **NEXT**.



## Ordering Custom Documents

(continued)

### Step 9

The **Order Details** screen appears.

If you chose **eDelivery** in **Step 2**:

- › Review the information on this screen, click **NEXT**, and proceed to **Step 10**.

If you chose **Print & Ship** in **Step 2**:

- › Enter your credit card information and check the **Email Receipt** box.
- › Click **NEXT**.

### Step 10

This is your last opportunity to make any changes to your order.

- › Click **SUBMIT ORDER** and you'll receive the **Order Confirmed** screen with your **Sales Reference Number** in the upper right corner.
- › To check the status of your order, follow **Step 10** on Page 5 of the **Sales Book Ordering** section above.
- › Expect to receive your order confirmation email immediately after completing your order.
- › For eDelivery orders, your high-resolution PDF file will arrive within 2 hours of your order.

Once you become more comfortable using our ordering system, you will find it an intuitive and powerful tool.

Together, all the way.<sup>SM</sup>

