

CUSTOMPOINT

Sales Kit and Brochure Ordering Guide

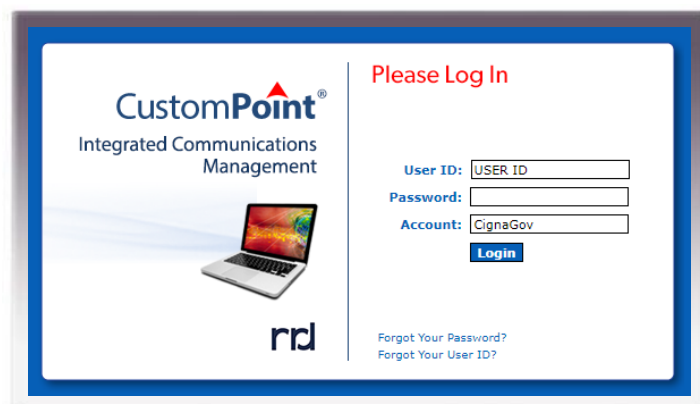
October 2023



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 **S3niOrs!**
(That's a lower case "i" after the "n" , Capital Alpha "O" and an exclamation point after the letter "s").
- › The password is case sensitive.
- › Then enter **CignaGov** (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. Select the Home button to refresh the site and begin again.

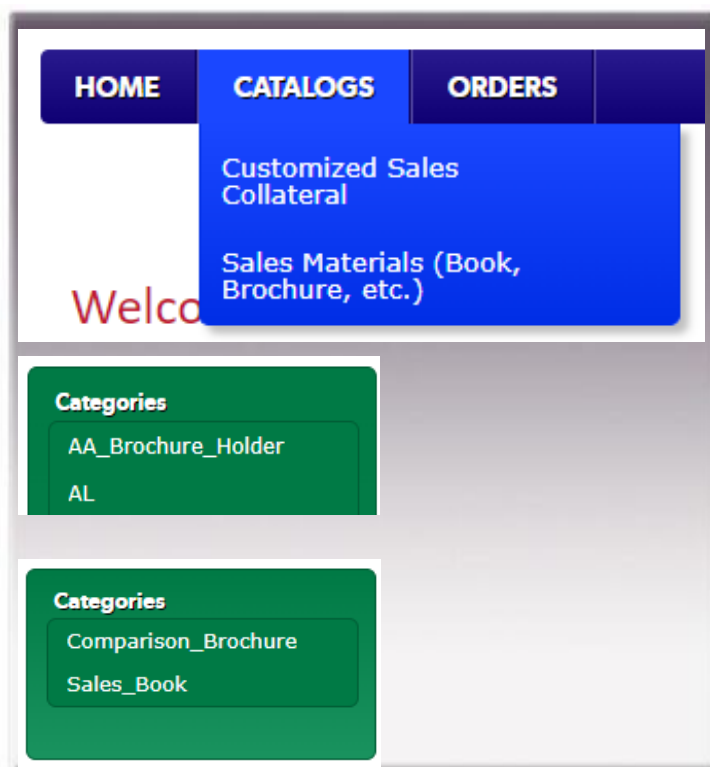
Ordering Sales Books

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Step 2




Mouse over **CATALOGS** and in the dropdown, select Sales Materials (Book, Brochure, etc.), followed by the year.

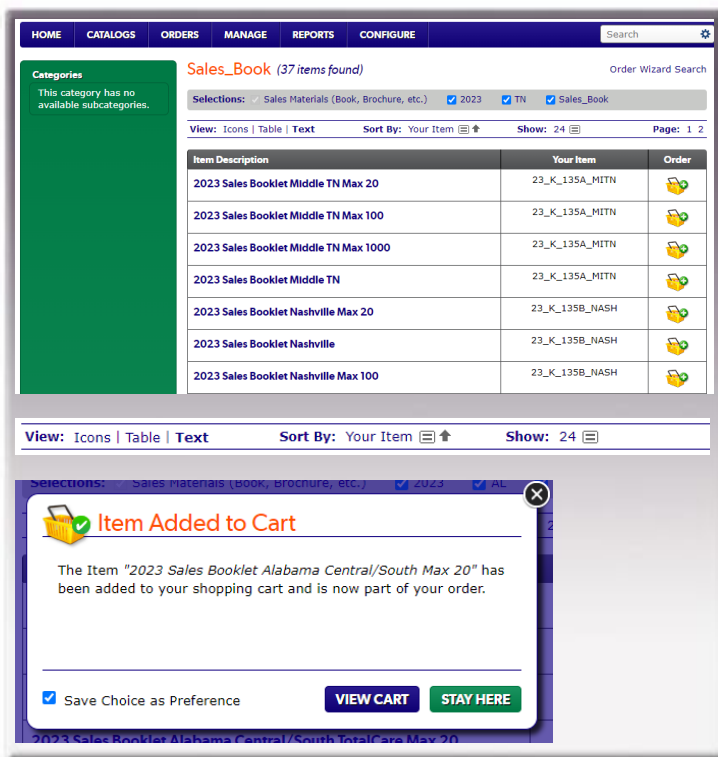
- In the green box on the left, select the state from the list of Categories that appear that you would like to order materials for.
- After selecting the state, in the green box on the left, select Sales Books or Comparison Brochure from the list of Categories that appear.



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 from the bottom of the list.
- If you don't see the product you need on your screen, click **SHOW** on the bottom row 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.
- You will either get a pop-up to confirm that the item is now part of your order. Either click **STAY HERE** to continue shopping or **VIEW CART**.
- OR
- the  will change to a check mark
- When you have finished shopping click **VIEW CART** or the  at the top of the screen.



Ordering Sales Books

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Step 4

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

- You will receive a warning message if you have not entered a quantity, enter the quantity and click **UPDATE CART** before you select **CHECK OUT**.
- If you need to remove an item, place a check mark in the box next to the item, click on **More Cart Options** and select **Remove Selected**.

Maximum Quantities

AGENTS	20
GAs	100
FMOs	1,000

Please try and order in multiples of 10 (if you do not need 10 then order less) and **only** what you really need.



ATTENTION FMO's & GA's

You may order Sales Books for only ONE State at a time. For example, if you place an order for TN , only TN materials may be ordered. If other states are required place you order CHECK OUT and then place another order. If you don't your orders may be canceled.

Step 5

When the **Delivery Options** screen appears, click **Your Personal Address** under **Addresses Found** (Move to Step 7)
Or
from the drop-down select **Manually Enter Address**. (Move to Step 6)



Ordering Sales Books (continued)

Step 6

Enter the **Ship To Name, Company Name** (which goes in the **Ship To Name 2** box) **Address** and **Phone Number** in the fields listed.

- › Complete the **ATTENTION** line.
- › At the bottom, click **VALIDATE**.
- › Click **Add to Address Book** to skip this step in the future.

The screenshot shows a web form for entering address information. At the top left, there's a dropdown menu labeled 'Address Source' with 'Manually Enter Address' selected. To the right is a dropdown for 'Bill To Address *' with 'Select a Bill To Address...' as the placeholder. Below these is a section titled 'Enter Address Here' containing several input fields: 'Ship To Name *' and 'Ship To Name 2', 'Address Line 1 *' and 'Address Line 2', and 'Address Line 3'. Below these are fields for 'City *', 'State *' (a dropdown with 'Select a Sta' visible), 'Zip *', 'Country *' (a dropdown with 'United States' selected), and 'Phone'. At the bottom of this section is an 'ATTENTION *' field containing 'SHARON SMITH'. Below the address fields are three checkboxes: 'VALIDATE' (checked), 'Add to Address Book', and 'Is Default Address'. At the very bottom of the form are three buttons: 'SAVE ORDER', 'CANCEL', and 'BACK NEXT'.

Step 7

- › Choose the Bill To Address from the Select a Bill To Address... drop down menu (this is the region you are ordering for).
- › Click **NEXT**.

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

The screenshot shows a dropdown menu for selecting a bill-to address. The dropdown is open, showing a list of addresses. The top of the dropdown shows 'USA'. The text 'Bill To Address *' is visible above the dropdown. The dropdown itself contains the text 'Select a Bill To Address...' and a downward arrow.

Step 8

Review the order

CONFIRM THE SHIP TO ADDRESS

and click **SUBMIT ORDER**.

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

The screenshot shows the 'Order Summary' page. At the top, it says 'Order Summary' and 'Step 3 of 3'. Below this is a section for shipping information: 'Ships To: SHARON SMITH, 176 BROWNS BRIDGE RD, PURVIS, MS 39475, ATTENTION: SHARON SMITH'. To the right of this section are links for 'View or Print All Details' and 'Show Order Detail'. Below the shipping information is a section for 'Items Ordered'. It shows a document icon for '2023 Sales Booklet Alabama North/Tuscaloosa TotalCare Max 20' with 'Your Item: 23_K_026_ALNT' and 'Units: KT of 1, Quantity: 10'. The price is listed as '\$0.00'. Below the items ordered section is a 'Notes' section with text about freight charges and price subject to change. To the right of the notes is a summary of costs: 'Subtotal: \$0.00', 'Estimated Shipping: TBD', and 'Total: TBD'. At the bottom of the page are three buttons: 'SAVE ORDER', 'CANCEL', and 'BACK SUBMIT ORDER'.



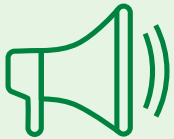
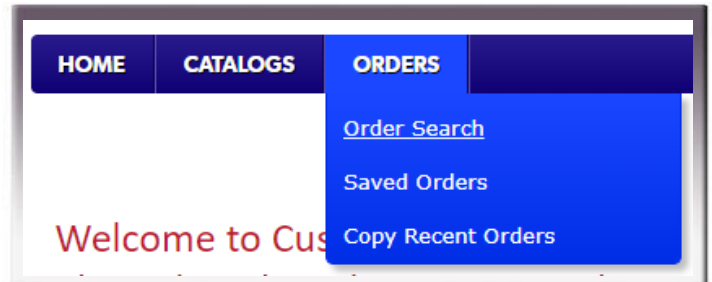
Ordering Sales Books

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CHECKING ORDERS

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.*

*The above is accurate for most of the year, during the run up to AEP and the first couple of weeks of AEP it may take an extra day due to the number of orders that are received and have to be fulfilled.

