

# Toppan Merrill: CoBrand OnDemand

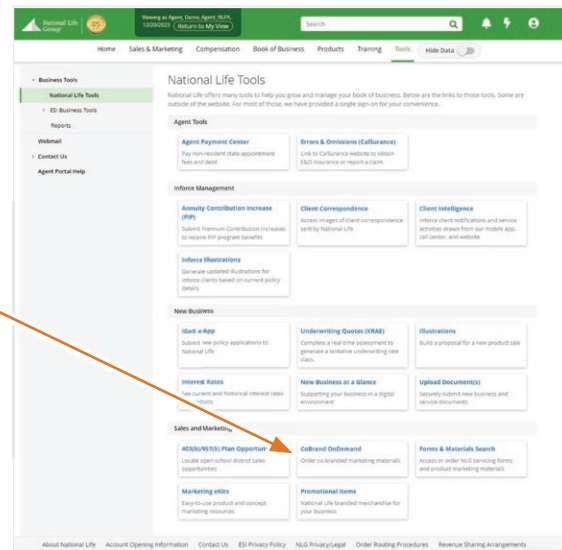
## HOW-TO AND FREQUENTLY ASKED QUESTIONS

Your all access platform to create custom marketing materials.

### STEP 1: Access CoBrand OnDemand

Log on to the National Life Agent Portal

Select **Tools** in the upper right corner, under Sales and Marketing, select **CoBrand OnDemand**.



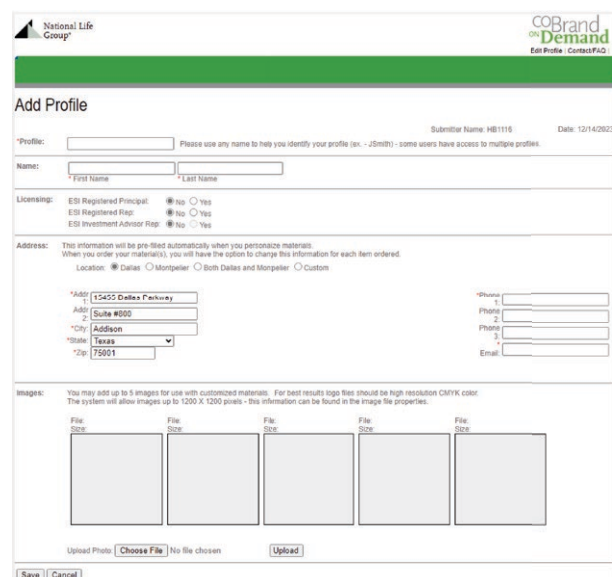
### STEP 2: Build Your Profile

Before you can begin creating custom materials, you will need to set up your profile. Your profile details automatically feed into the marketing pieces you select allowing you to customize easily and quickly.

1. Click **Add Profile** and enter the requested information. Upload up to 5 images to be used while personalizing pieces. Be sure to include an agency logo and headshot.

2. Click **Save** when complete.

It will then direct you to the Item Search screen where you can begin creating your first custom piece. (Agency staff will be prompted back to the Profile page where they should click **Continue**.)



National Life Group® is a trade name of National Life Insurance Company (NLIC), Montpelier, VT, Life Insurance Company of the Southwest (LSW), Addison, TX and their affiliates. Each company of National Life Group is solely responsible for its own financial condition and contractual obligations. Life Insurance Company of the Southwest is not an authorized insurer in New York and does not conduct insurance business in New York.

No bank or credit union guarantee | Not a deposit | Not FDIC/NCUA insured | May lose value | Not insured by any federal or state government agency

Guarantees are dependent upon the claims-paying ability of the issuing company.

### STEP 3: Add Images to Your Profile

You may add up to 5 images to your profile to use in customized materials.

*NOTE: For best results, logo files should be high-resolution images up to 1200 pixels. This information can be found by right clicking on the image file then: Windows users select file properties, Mac users select get info.*

Typically, agents will upload an agency logo and headshot. Anything uploaded is reviewed by compliance once it's added to an ordered piece.



Photos do not need to be approved by compliance before adding them in to the system. You can place images on any of the documents in the CoBrand library with a placeholder for an agency logo or agent photo.

### STEP 4: Item Search

Search for templates by:

- Catalog number (located in the lower right corner of the piece)
- Keyword (recruiting, Spanish, ESI, orphan)
- Type of material (flyer, postcard, brochure)
- Audience (business owner, consumer)
- Subject matter (annuities, living benefits, etc.)

### STEP 5: Select the Pieces in your Order

For each piece you want to use, enter the quantity you want to receive and select **Add to Order**. The system will allow you to enter up to 6 pieces. We ask that you wait a two weeks before entering more orders to allow compliance to expeditiously review all submissions.

*NOTE: To download a free, print-ready PDF file, enter "1" in the quantity field. This does not apply to stationery. You can still order stationery for email delivery to avoid print charges, but have to add the minimum number shown in the description.*

If you would like to order multiple pieces go back to the Item Search page and repeat these steps until you have added all the items you would like to personalize.

Once everything has been added, click on the shopping cart.

## STEP 6: Personalize Your Items In Your Cart

Once you have selected all the pieces for your order, click on the Shopping Cart in the upper right hand corner, open each piece, and select "Personalize". The areas available for personalization are pre-filled from your profile. If you would like to edit any of the personalization, simply re-enter the information.  
*NOTE: logos and photos will be pulled from your profile.*

The new information will not be saved to your profile but will change on the personalized piece. Once the information is correct, select **Next**.

The screenshot shows the 'Personalize' form in the National Life Group system. The form is titled 'Personalize' and has a 'Selected Template' dropdown set to 'More to Love Flyer with image options'. Below this are several input fields: 'Agent Name', 'Designations 1', 'Designations 2', 'Designations 3', 'Agency Name', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Phone Description 1', 'Phone 1', 'Phone Description 2', 'Phone 2', 'Email', 'Insurance License', and 'Insurance License Number'. Each field has a 'Please Select' or similar placeholder. At the bottom, there are '<< Back' and 'Next >>' buttons.

## STEP 7: Item Preview

Review any personalization to make sure it is correct. If correct, select the states where the piece will be distributed and select **Save Personalized Item**.

To download (and print) a watermarked PDF to review, click the save or download icon.

If edits are required, select **Back** and make the necessary edits.

The screenshot shows the 'Preview Document' page. It features a preview of a flyer with the National Life Group logo and the text 'The More You Have to Love, The More You Have to Protect'. Below the flyer is a list of states with checkboxes for selection. The states listed are: AK, CO, GA, IN, MD, ME, NH, OH, SC, VA, WY, AL, CT, HI, KS, MI, MN, NJ, OK, SD, VT, AR, DC, IA, KY, LA, NC, NM, OR, TN, WA, AZ, DE, ID, IL, MN, ND, NV, PA, TX, WI, CA, FL, IL, MA, MO, NE, NY, RI, UT, WV. There are 'Select All' and 'Deselect All' buttons. At the bottom, there are '<< Back' and 'Save Personalized Item >>' buttons. An orange arrow points from the text 'click the save or download icon' to the 'Save Personalized Item >>' button.

## STEP 8: Review Cart

### Delivery

Select Delivery Type first before selecting Personalize. You can choose whether to have the item printed and mailed to you, or have the print-ready file emailed to you *at no cost* once it has been approved.

### Shipping Address

If the items are being printed, the default address added in your profile will be listed as the shipping address. If you would like to have it shipped to a location other than your default address, simply click **Edit** and enter the new address.

The screenshot shows the 'Review Cart' page for National Life Group. The top navigation bar includes 'Home', 'Place Order', 'My Orders', and 'Admin Only'. The 'Review Cart' section displays 'Order Contents' with a table of items. The 'Delivery' section shows 'Delivery Type' with options for 'Print and Mail' and 'E-Mail'. The 'Shipping Address' section shows the default address and an 'Edit' link. The 'Billing Information' section shows a dropdown for 'Please Select Payment Option'.

### Order Contents

All items added to your cart for personalization will be listed. If the item needs further personalization, select **Personalize**

### Shipping Details

The estimated shipping costs can be viewed by clicking on the link. If you would like a shipping method other than Ground, select **Edit** and choose the shipping method you would prefer.

### Billing Information

If the item is being printed, add your credit card information here. If you are an office manager or agency staff in our Affiliated Distribution channel, it can be billed to the agency cost center.

## STEP 9: Completing and Ordering Item

Once in the review cart choose the delivery method (print and mail, or email order). If choosing the print and mail option, confirm the shipping address and complete the billing information. When complete, click **Save Changes/Submit Print Order**.

After your order is approved you will receive an email from compliance indicating that it has been approved and sent for printing. If you chose the option of having a print-ready file sent to you at no charge, you will receive a link to download the piece.

This screenshot is identical to the one in Step 8, showing the 'Review Cart' page. An arrow points from the text in Step 9 to the 'Save Changes/Submit Print Order' button at the bottom of the page.

## STEP 10: Status of Your Order

If at any time you would like to see the status of your order, click on the **My Orders** tab.

The screenshot shows the 'My Orders' page. The top navigation bar includes 'Home', 'Place Order', 'Order Search', 'My Orders', and 'Admin Only'. The 'Recent Orders' section displays a table with columns: ORDER #, CREATED, CREATED BY, CLIENT NAME / SHIPPED TO, SHIP METHOD, and STATUS. The table contains one order with ID 1353292, created on 12/14/2023 at 01:54 PM, shipped to National Life Group, via Best Way Ground, with a status of 'Saved'.

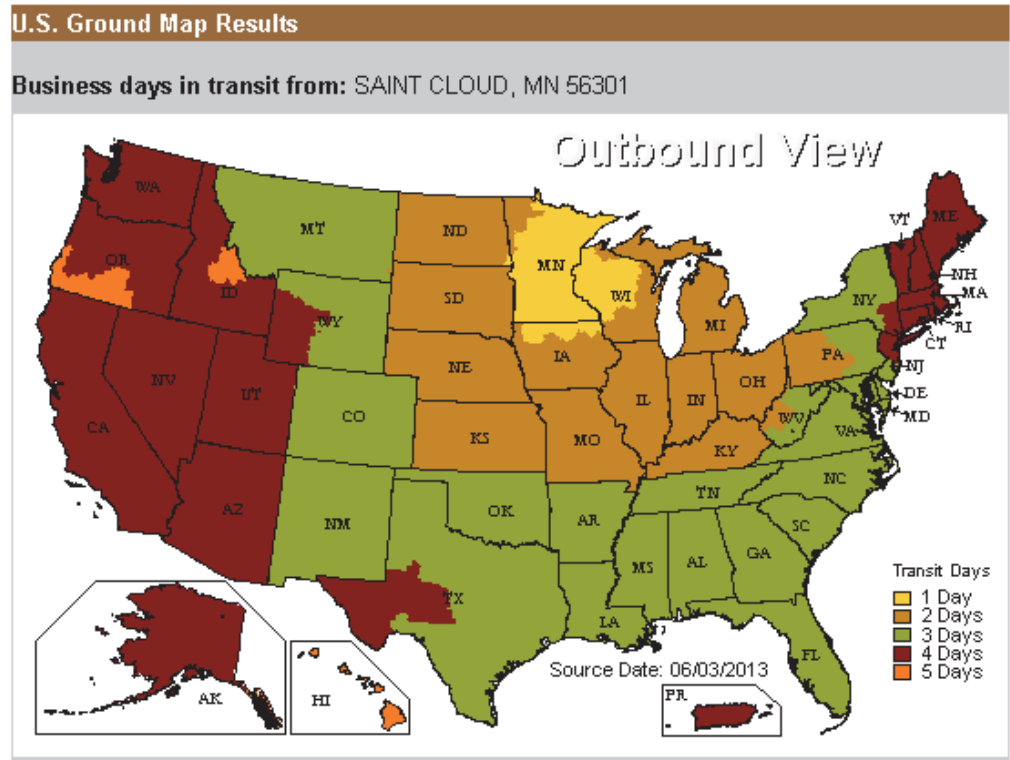
# Frequently Asked Questions:

## How long will my print order take to reach me?

Production time:  
5 business days or less

*Plus*

Shipping time  
from St. Cloud, MN:  
5 days or less



## How do I cancel my order?

There is a small window of time that an order can be canceled on the site. Once that window is closed, you will have to contact the Merrill Customer Service Group at [NationalLifeGroup@ToppanMerrill.com](mailto:NationalLifeGroup@ToppanMerrill.com)

## Can I print any of these materials on my own?

Yes. Once an item is approved, printing will be allowed without a "Proof" watermark.

## Can I add my website address?

Only if you have submitted your website for compliance review, and received an approval on it.

## When I setup my profile, what if the state I'm doing business in is *not* listed?

State license number is only required if you are doing business in Arkansas or California.

## More Questions?

Email [NationalLifeGroup@ToppanMerrill.com](mailto:NationalLifeGroup@ToppanMerrill.com)

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