

# COBRAND ONDEMAND

## Quick Reference Guide

### How to Access CoBrand OnDemand

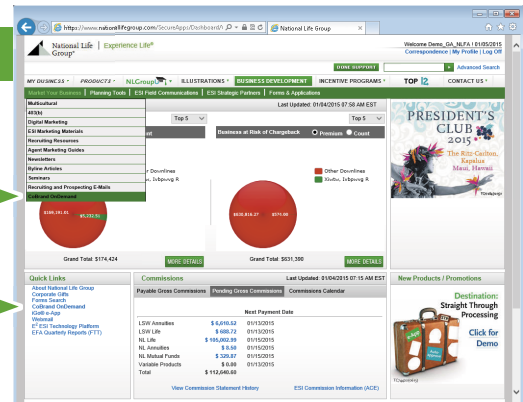
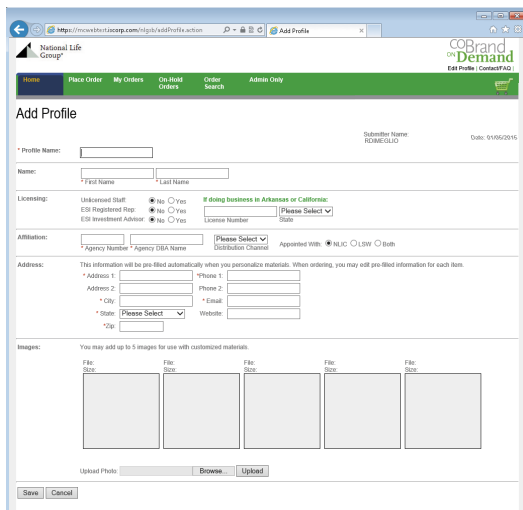
Log onto the NLGroup web site

Select the following drop down menu

Business Development/Market Your Business/CoBrand OnDemand

OR

click on CoBrand OnDemand in the Quick Links Section

**Add Profile**

\* Profile Name: \_\_\_\_\_ Subscriber Name: ROMEGLIO Date: 01/05/2015

Name: First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Licensing: Unlicensed Staff  Yes  No  If doing business in Arkansas or California:  Yes  No  License Number: \_\_\_\_\_ State: \_\_\_\_\_

ESR Registered Rep:  Yes  No  License Number: \_\_\_\_\_ State: \_\_\_\_\_

ESR Investment Advisor:  Yes  No  License Number: \_\_\_\_\_ State: \_\_\_\_\_

Attiliation: Agency Number: \_\_\_\_\_ Agency DBA Name: \_\_\_\_\_ Distribution Channel: \_\_\_\_\_ Appointed With:  NLC  LSW  Both

Address: This information will be pre-filled automatically when you personalize materials. When ordering, you may edit pre-filled information for each item.  
Address 1: \_\_\_\_\_ Phone 1: \_\_\_\_\_  
Address 2: \_\_\_\_\_ Phone 2: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_  
Zip: \_\_\_\_\_ Website: \_\_\_\_\_

Images: You may add up to 5 images for use with customized materials.  
Image 1: \_\_\_\_\_ Image 2: \_\_\_\_\_ Image 3: \_\_\_\_\_ Image 4: \_\_\_\_\_ Image 5: \_\_\_\_\_

Upload Photo: \_\_\_\_\_ Browse \_\_\_\_\_ Upload \_\_\_\_\_

Save Cancel

### Building Your Profile

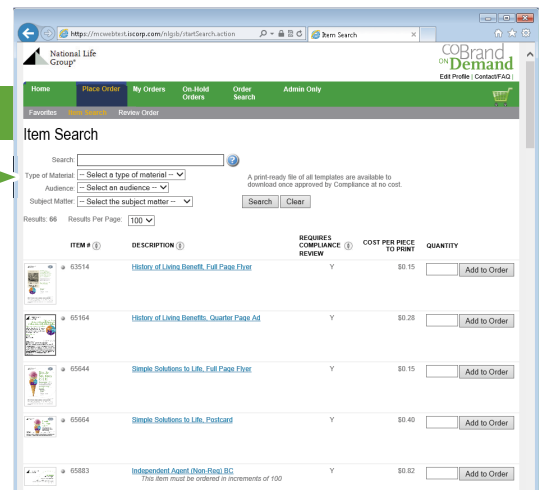
The first step is building your profile.

Click Add profile and enter the requested information. Upload up to 5 images (logos, photos, etc.) into your profile to be used while personalizing templates. For best results, use high resolution files in CMYK color.

Click Save when complete. You will be taken directly to the Item Search screen. (Agency Staff and Home Office users will be taken back to the Profile page where they should click Continue.)

### Item Search

Search for templates by keyword, type of material, audience or subject matter. To view an item prior to personalization click on the thumbnail located to the left of the item description.

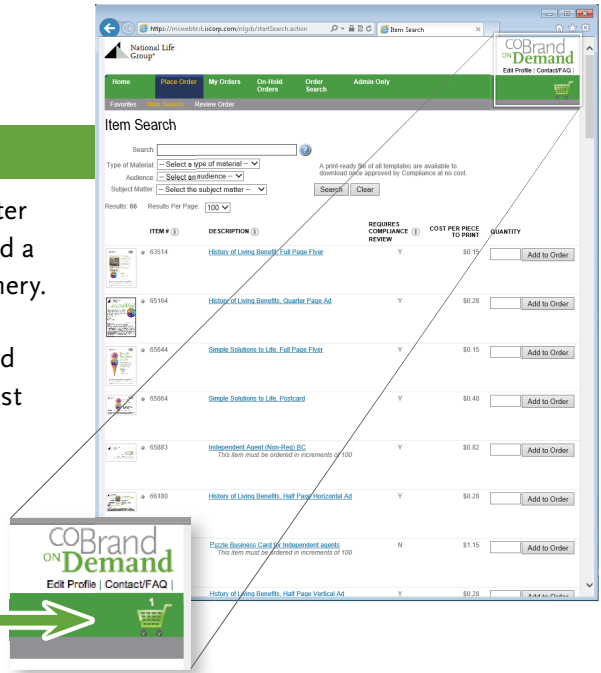


## Item Search (continued)

Once you have chosen the item you would like to personalize enter the quantity you would like to order. If you would like to download a free, print-ready file, type 1 in the quantity field, except for stationery.

You'll see that some items indicate they can be personalized and downloaded immediately without compliance review. We suggest you place separate orders for items requiring review, and those which don't require review.

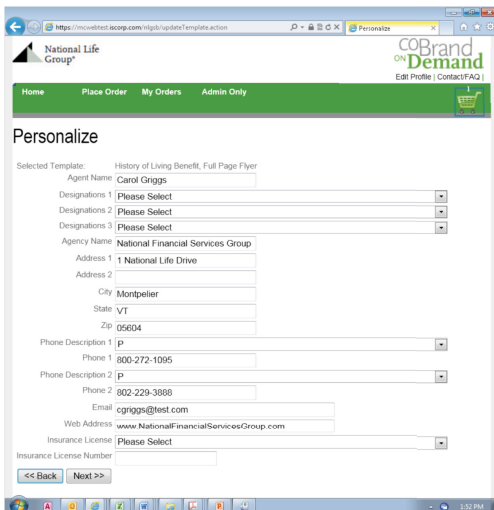
Once you have determined the quantity click Add to order. Repeat until you have added all the items you would like to personalize. Once complete click on the shopping cart



## Personalizing Your Item

The areas that are available for personalization will be pre-filled from your profile. If you would like to edit any of the personalization, simply re-type the information.

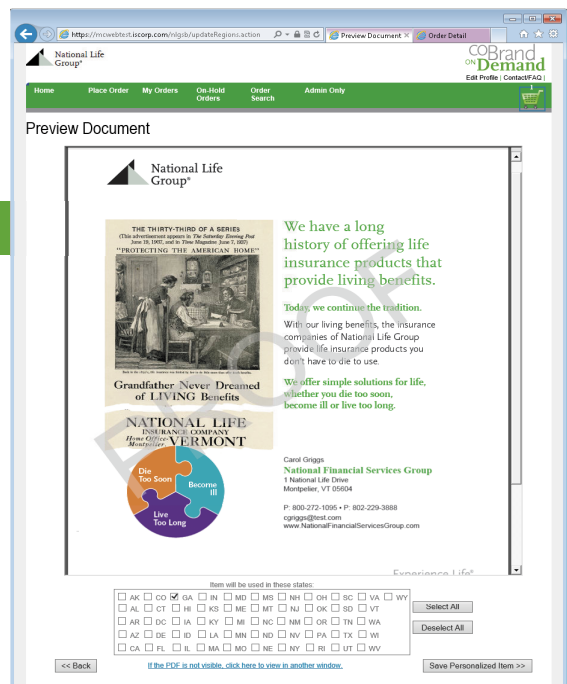
The new information will not be saved to your profile but will be changed on the personalized piece. Once the information is correct click Next.



## Item Preview

Review the personalization to make sure it is correct. If it is, click the states that the piece will be distributed in and click Save Personalized Item.

If it requires edits, click Back, and make the necessary edits.



## Review Cart

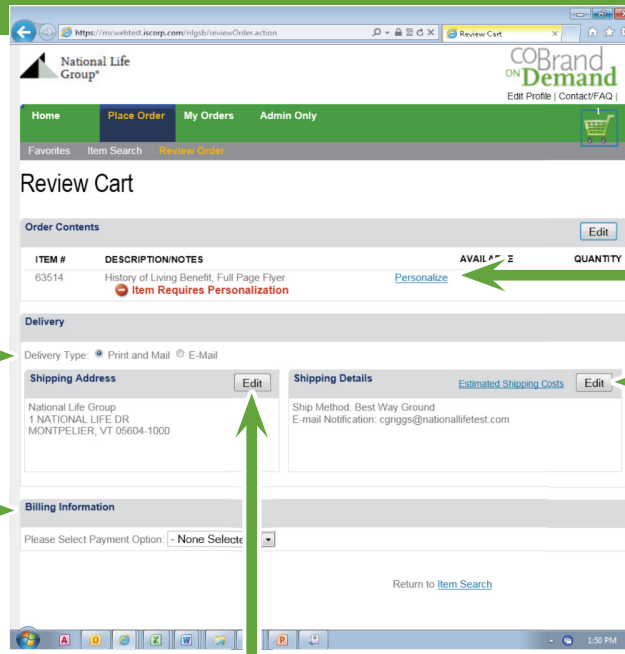
### Delivery

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 after it has been approved.



### Billing Information

If the item is being printed, add your credit card information here. Or, if you are an Office Manager or agency staff, it can be billed to the agency cost center.



### Order Contents

All the items added to your cart for personalization will be listed. If the item need further personalization click 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, click Edit and choose the shipping method you would prefer.



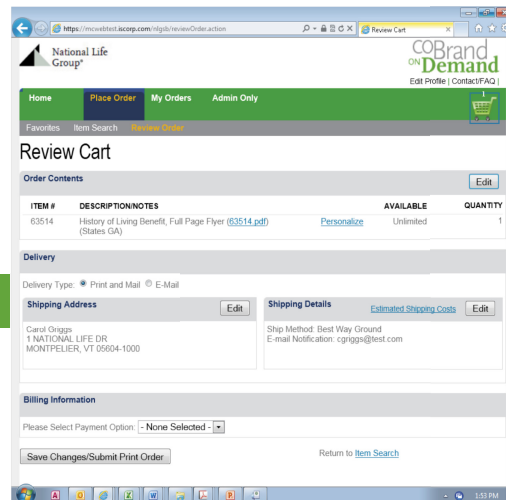
### Shipping Address

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 someplace other than your default address simply click Edit and type in the new address.



## Completing and Ordering Your 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 has been sent for printing. If you choose the option of having a print-ready file sent to you at no charge, you will receive a link to download the piece.

## Status of Your Order

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

