


# Convenient Material Ordering

## Ordering Materials

Quick Links	
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In the “Quick Links” section on the left side of the page, click on “Marketing Materials” and then click “Order Materials Here.”

You will be directed to a page with the link below, “Click here to Order Material.” Click on the link and it will direct you to another site to order materials.

 [Click here to Order Material](#)

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Broker Material Supply Portal

HOME CATALOGS ORDERS Search

Freedom Health  
Optimum Health

Click the Company you want to start with.

**General**

**CustomPoint Order Entry Guide** 05/29/2015  
Click [here](#) to view the CustomPoint Order Entry Guide.

**VIP Agent Support Team** 09/09/2011  
Please contact VIP Agent support team at 1-877-877-0539 to get more information about your material allocation.

**Technical Difficulties?** 09/22/2008  
Experiencing technical difficulties with our site? Please contact the CustomPoint Support Group @ 866-362-3230. Available Monday through Friday from 7am to 7pm EST.

**Order Reminders**  
Here are your saved or pending orders awaiting completion:  
[User and System Saved \(6\)](#)

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- Click on “CATALOGS” and then select the company that you would like to shop for first.
- Once you have completed Freedom, then move on to Optimum (if you need both).

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## Broker Material Supply Portal

HOME CATALOGS ORDERS

**Categories**

- Formulary
- Pre-Enrollment Kit
- Provider and Pharmacy Directory
- Scope of Appointment

**Freedom Health (0 items found)**

Selections: Freedom Health

CLICK EACH ITEM INDIVIDUALLY.

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There is a blue box on the left-hand side of the screen titled “Categories”. You will need to then click on each individual item to add to your cart:

- 1 Formulary for each Line of Business
- Multiples of 8 for Pre-Enrollment Kits (so if you need 2 boxes, you must have a quantity of 16)
- 1 Provider Directory for each county group you service
- 1 Scope of Appointment each (pack of 25)

Welcome, nathan markowitz

My Profile

Sign Out



Cart 2

Help ?

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## Broker Material Supply Portal

HOME

CATALOGS

ORDERS

Search



### Categories

This category has no available subcategories.

CLICK/HOVER  
ON THE ITEM  
YOU NEED.

### Provider and Pharmacy Directory (4 items found)

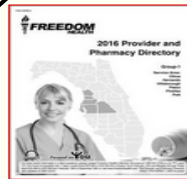
**Selections:** ☒ Freedom Health ☒ Provider and Pharmacy Directory

View: Icons | Table | Text

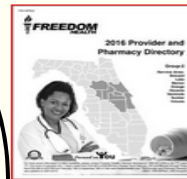
Sort By: Catalog Sequence

Show: 8

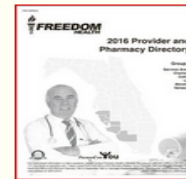
Page: 1



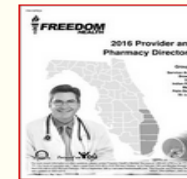
**FRH-Provider & Pharmacy Directory-1**  
FRH16PRD1



**FRH-Provider & Pharmacy Directory-2**  
FRH16PRD2



**FRH-Provider & Pharmacy Directory-3**  
FRH16PRD3



**FRH-Provider & Pharmacy Directory-4**  
FRH16PRD4

View: Icons | Table | Text

Sort By: Catalog Sequence

Show: 8

Page: 1

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When you click on each category, a screen will appear with all the items available:

- You can either hover over the item you want, and a box will appear to add quantities and add the item to cart;
- Or you can click on the item and it will take you to the item's page where you can click the image to enlarge it, add the quantity you need, and add the item to your cart.  
(See next page for examples)

If you click on the item, you will be brought to this page. You can click on the image to enlarge, add the quantity you need, and add the item to cart.

ENTER THE QUANTITY THEN ADD TO CART.

If you use your mouse to hover over the item, you can type in the quantity you want and then add the item to your cart directly from the category page.

ENTER THE QUANTITY THEN ADD TO CART.

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[Back To Results](#)

**FRH-Provider & Pharmacy Directory-1**

Your Item: FRH16PRD1 Vendor Item: FRH16PRD1 Used: 0 of 2 (Until 12/31/2015)



Units: EA of 1 Quantity:  [ITEM IS IN CART](#)

[Show Full Size Image](#)

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**Categories**

This category has no available subcategories.

**Provider and Pharmacy Directory (4 items found)**

**Selections:** ☒ Freedom Health ☒ Provider and Pharmacy Directory

**View:** Icons | Table | Text **Sort By:** Catalog Sequence **Show:** 8 **Page:** 1




**Ordering Options**

Units: EA of 1  
Qty:   
[Select Units and Quantity](#)  
[ADD TO CART](#)

**FRH-Provider & Pharmacy Directory-2**

Your Item: FRH16PRD2  
Vendor Item: FRH16PRD2



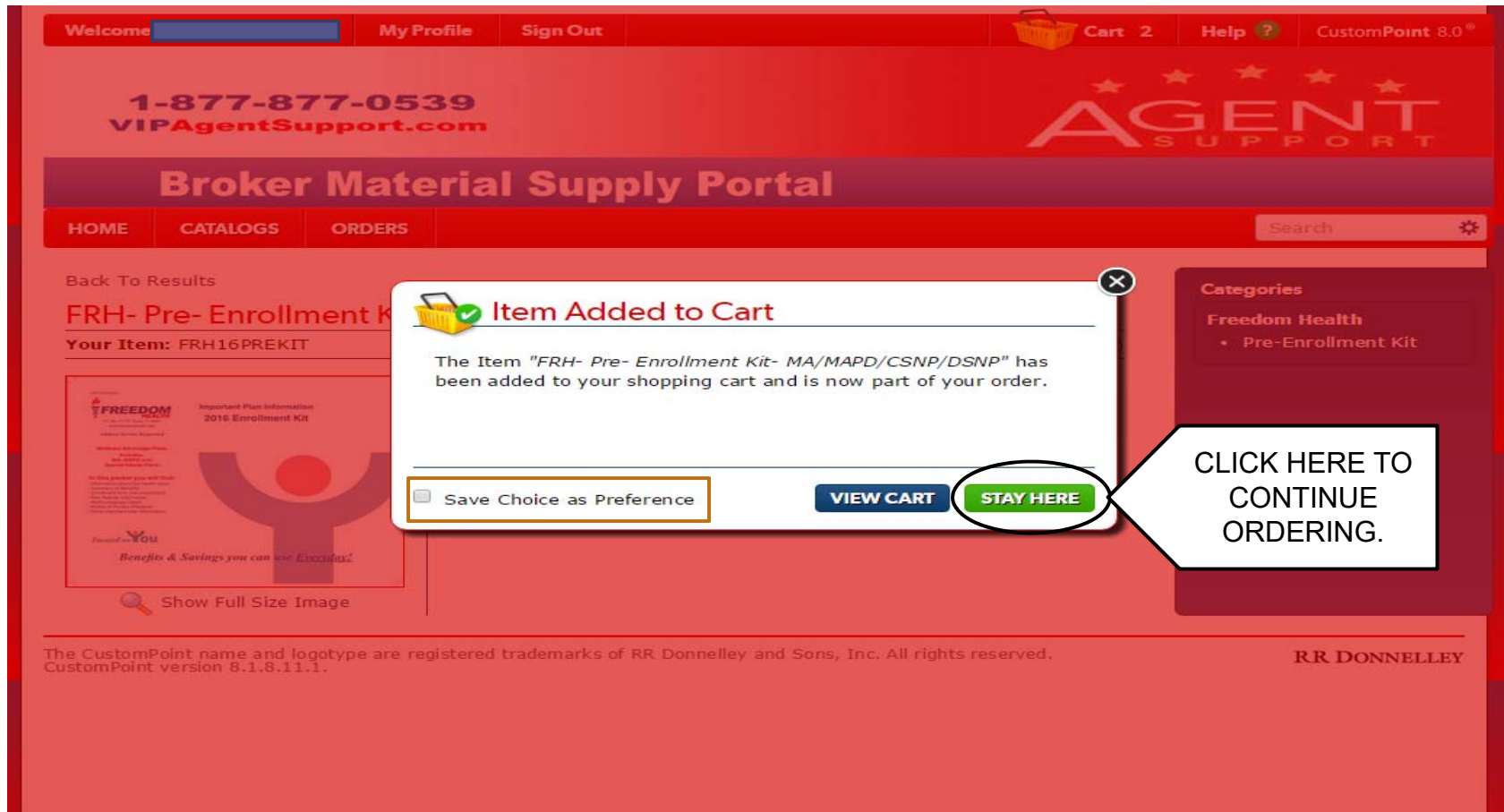
**FRH-Provider & Pharmacy Directory**

FRH16PRD1 FRH16PRD2 FRH16PRD3 FRH16PRD4

**View:** Icons | Table | Text **Sort By:** Catalog Sequence **Show:** 8 **Page:** 1

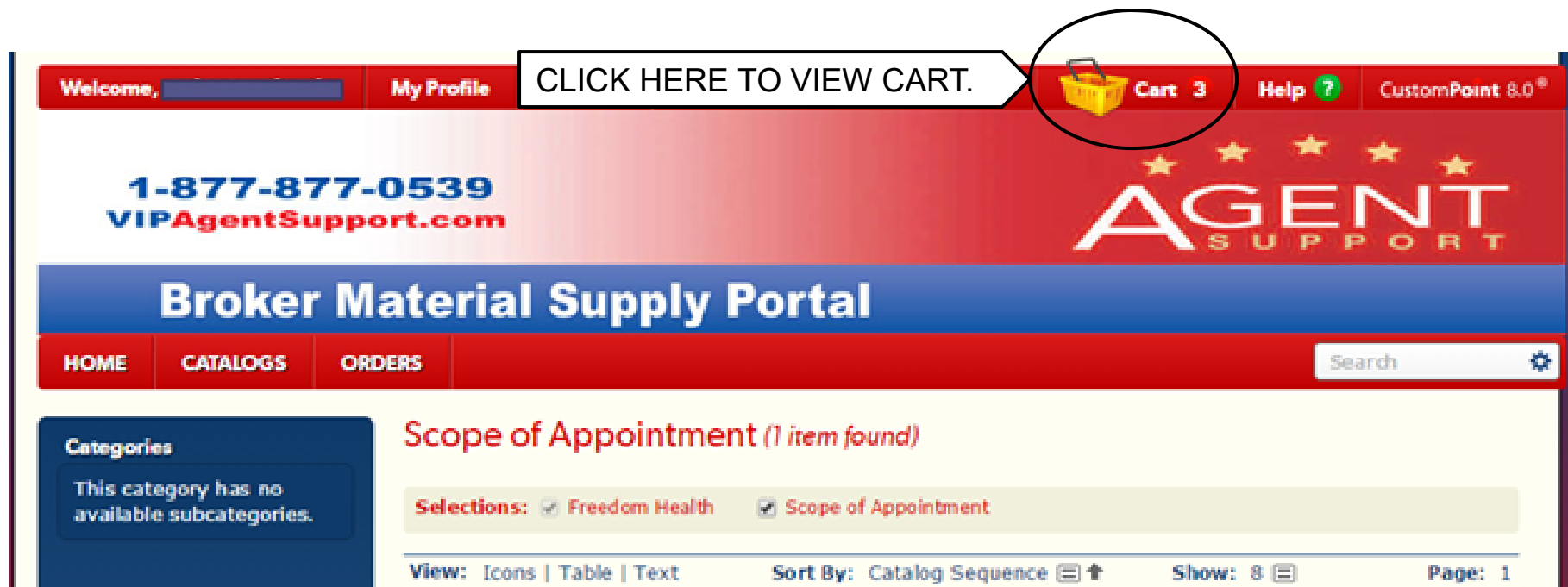
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Once you click “Add to Cart”, a message box will appear:

- Confirming the item was added to your cart and giving you the option to “Save Choice as Preference” for faster ordering later.
- Also gives you the choice to view your cart as it is currently or “stay here” to continue shopping.



Once you have added all the necessary items to your cart:

- You can click on the yellow basket at the top of the screen that has the number of items in the cart next to it.

(Or you could have clicked on 'view cart' when the last pop-up appeared)

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## Broker Material Supply Portal

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Shopping Cart Contents (4 Items)

	<b>FRH-FORMULARY - COMBINED (AGENT USE)</b> Your Item: FRH16COMFORM Vendor Item: FRH16COMFORM Units: EA of 1 Qty: <input type="text" value="2"/>	Remove Item	Availability TBD
	<b>FRH- Pre- Enrollment Kit- MA/MAPD/CSNP/DSNP</b> Your Item: FRH16PREKIT Vendor Item: FRH16PREKIT Units: EA of 1 Qty: <input type="text" value="8"/>	Remove Item	Availability TBD
	<b>FRH-Provider &amp; Pharmacy Directory-1</b> Your Item: FRH16PRD1 Vendor Item: FRH16PRD1 Units: EA of 1 Qty: <input type="text" value="2"/>	Remove Item	Availability TBD
	<b>FRH-SCOPE OF APPOINTMENT-SOA</b> Your Item: FRH12SOA Vendor Item: FRH12SOA Units: PK of 25 Qty: <input type="text" value="1"/>	Remove Item	Availability TBD

**UPDATE CART**

[SAVE ORDER](#)
[More Cart Options](#)
[CONTINUE SHOPPING](#)
[CHECKOUT](#)

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REVIEW ALL  
ITEMS AND  
QUANTITIES.

### Shopping Cart Contents:

- You can update your cart here if needed.
- You can save your order for future placement.
- You may continue shopping
- Or you may click the green 'CHECKOUT' button on the bottom right hand side.

The screenshot shows a web browser window with a shopping cart page. The URL is <https://custompoint.rrd.com/cp/orders/shoppingcart.cp?ttsessionid=VWJGSmtMbmkwRlo3OVp2Mk1aRmlGZHizWm9IWGNmT1pEZA%3D%3D>. The cart contains several items, each with a 'Remove Item' button and a status indicator. A red bar with a warning icon and text is highlighted by a black oval. A callout box on the left points to this bar.

IF YOU CANNOT PROCEED, SEE IF THERE ARE ANY RED BARS, IF YES, SEE BELOW ON WHAT TO DO.

Item	Your Item	Vendor Item	Status
FRH-SCOPE OF APPOINTMENT-SOA	FRH12SOA	FRH12SOA	In Stock
OPT-FORMULARY - COMBINED (AGENT USE)	OPT16COMFORM	OPT16COMFORM	In Stock
OPT-Pre-Enrollment Kit- MAPD/CSNP/DSNP	OPT16PREKIT	OPT16PREKIT	In Stock
OPT-Provider & Pharmacy Directory-1	OPT16PRD1	OPT16PRD1	In Stock
<b>BACKORDER WARNING: This item is not available for the specified quantity at this time. This item will be backordered if submitted.</b>			
OPT-Provider & Pharmacy Directory-2	OPT16PRD2	OPT16PRD2	Backordered
OPT - Scope of Appointment	OPT12SOA	OPT12SOA	In Stock

Buttons at the bottom: SAVE ORDER, More Cart Options, CONTINUE SHOPPING, CHECK OUT.

Once the 'Checkout' button is clicked, the cart will update with whether or not the items in the cart are available.

- If a red bar appears that has an allocation discrepancy, enter the quantity given.
- If a red bar appears because the item is out of stock and will be back logged, you can either remove the item and order it separately when it becomes available again or you can choose to keep the item and it will ship separately once it is restocked.

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HOME CATALOGS ORDERS Search

**Delivery Options** Step 1 of 3

**Address Source**

- Your Personal Address Book
- Your Personal Address Book
- Manually Enter Address
- Your Company's Master List of Approved Addresses

**Search** For

Select One

**SEARCH** More Search Options

**Addresses Found** (1)

Nathan

**Deliver To**

Nathan

**Ship To Attention \***

Nathan

**SAVE ORDER** **CANCEL** **BACK** **NEXT**

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HOME CATALOGS ORDERS Search

**Delivery Options** Step 1 of 3

**Address Source**

Your Personal Address Book

**Search Personal Address Book**

**Search** For

Select One

Select One

Company Name

Ship to Attention

City

Country

State

Zip

**Addresses Found** (1)

Nathan

**Deliver To**

Nathan

**Ship To Attention \***

Nathan

**SAVE ORDER** **CANCEL** **BACK** **NEXT**

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Once you have clicked 'Checkout' from shopping cart, you will need to provide Delivery Options (Step 1 of 3); you may:

- Choose an address source
- Or Search Personal Address Book

Click 'NEXT' when you are ready.

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HOME CATALOGS ORDERS Search

Order Details Step 2 of 3

**Customer Information**

Name \* Phone Number \*

nathan

Email Address \*

**Order Information**

Order Placed By \*

AGENCY ID \*  
258

User Name \*

Select User Name  
Select User Name  
A165207  
a165207  
2029

SAVE ORDER CANCEL BACK NEXT

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You will now be at 'Order Details' step 2 of 3.

- You will need to fill in all the boxes with an asterisk next to it (i.e. Name, Phone Number, etc.)
- Click 'NEXT'

(If you have had multiple agencies in the past, you will need to select your current agency ID.)

REVIEW THE  
INFORMATION  
IS CORRECT;  
MAKE SURE  
ALL ITEMS ARE  
ADDED TO THE  
CART; AND  
CLICK SUBMIT  
ORDER.

Order Summary Step 3 of 3

**Ships To:** Nathan [Redacted]

**Customer Information**

**Name** [Redacted] **Phone Number** [Redacted]

**Email Address** [Redacted]

**Billing Information**

**Billing Method**  
Invoice Your Account

**Order Information**




**Order Placed By**  
Nathan

**AGENCY ID**  
258

**User Name**  
[Redacted]

**VIP Agency ID**  
2029

**Items Ordered**

	<b>FRH-FORMULARY - COMBINED (AGENT USE)</b> Your Item: FRH16COMFORM Vendor Item: FRH16COMFORM Units: EA of 1 Quantity: 2
	<b>FRH-Pre-Enrollment Kit- MA/MAPD/CSNP/DSNP</b> Your Item: FRH16PREKIT Vendor Item: FRH16PREKIT Units: EA of 1 Quantity: 8
	<b>FRH-Provider &amp; Pharmacy Directory-1</b> Your Item: FRH16PRD1 Vendor Item: FRH16PRD1 Units: EA of 1 Quantity: 1

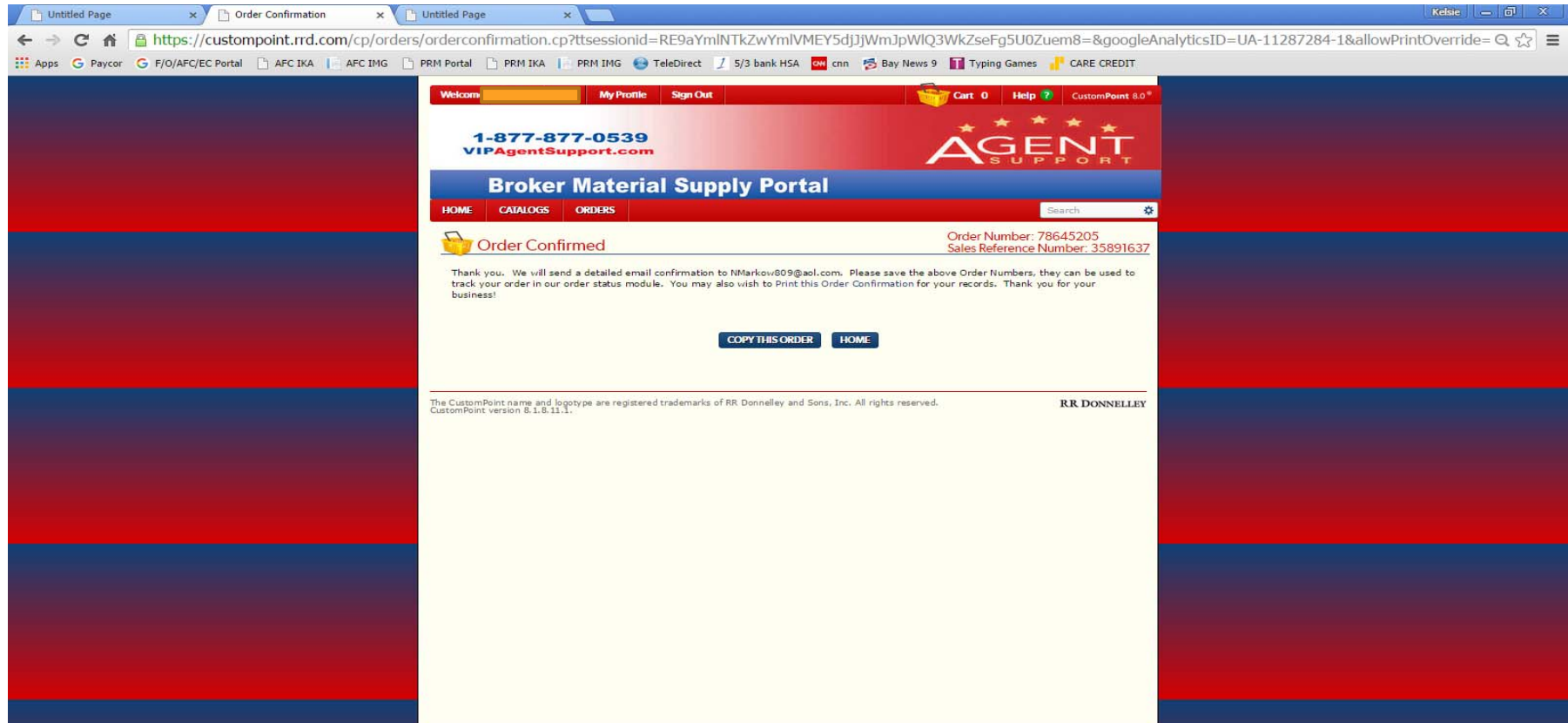
**SAVE ORDER** **CANCEL** **BACK** **SUBMIT ORDER**

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The 'Order Summary' is step 3 of 3. Here the you will:

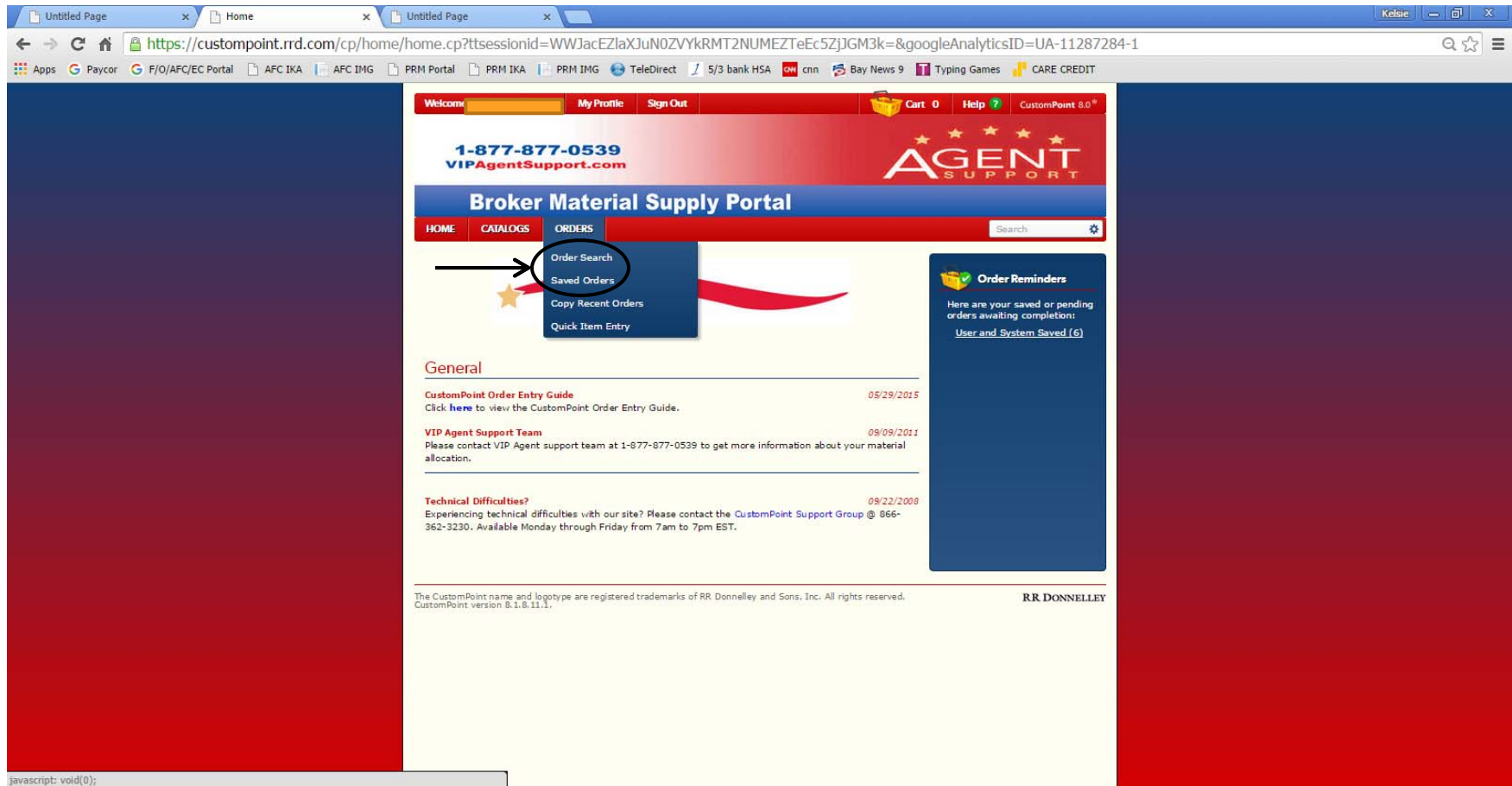
- Confirm the 'Ships To:' address is correct
- All 'Items Ordered' are in your cart with the correct quantities.
- If anything is missing or incorrect, you can go 'Back' or 'Cancel' the order.
- Once everything is reviewed, click 'SUBMIT ORDER'



Order Confirmed Page will have the order number, sales reference number, and a “thank you for placing your order.”

A **confirmation e-mail** will be sent to the e-mail address that you provided; it will contain the order number, the items ordered, and any additional info regarding the order.

You can click “home” to go back to the homepage, or click “copy this order” to save for a later date.



If you want to check your order status:

- You can click 'ORDERS' at the top of the page
- Click 'Order Search', and see all of your previous orders this year.

If you want to place a saved order:

- You can click 'ORDERS' at the top of the page
- Click 'Saved Orders', and select the one you wish to continue and place.

# Welcome!

Agent Services 1-877-877-0539

Monday - Friday 8:00am - 8:00pm

Saturday & Sunday 8:30am - 5:00pm during AEP