

Frequently Asked Questions and General Guidance

Marketing On Demand is a storefront that leverages variable data where you can create customized, case-specific product and enrollment support materials to educate employees during upcoming enrollments. Advantages you and your clients will appreciate include:

- Give prominence to your client by adding their company logo.
- Show your commitment to service by including your contact information.
- Better serve your client's employees by showing only the specific features being offered.

What do you need help with?

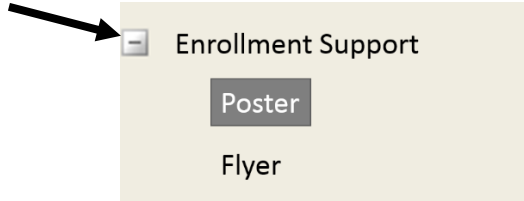
- [Customizing a Piece](#) (General Ordering Guide)
- [Navigating the Shopping Cart](#)
- [Draft Orders](#)
- [Previous Order Information](#)
- [Re-ordering Materials](#)
- [Return to Store Error Message](#)
- [Finding the Specific Product Material I Want](#)
- [Connecting to Harmony for a Product Piece](#)



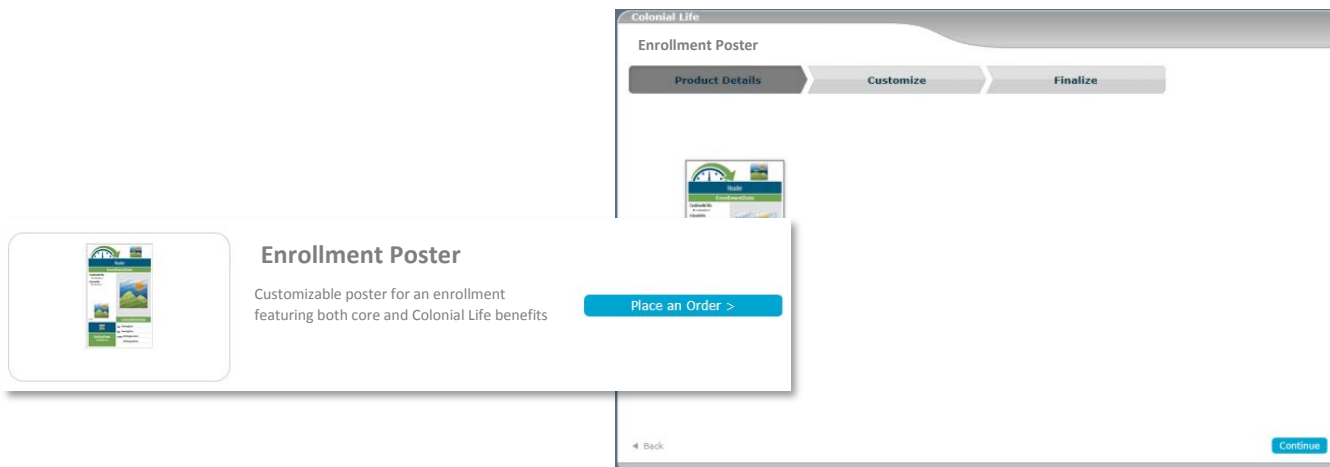
Are none of these what you are looking for? **Contact the Enrollment Solutions Service Desk at 1-800-438-6423, option 2, then 5.**

Customizing a Marketing Piece

1. In the left navigation, click the plus sign next to the category and view available options. The poster is found under Enrollment Support.
2. Click on the material type to select it.



3. Click **Place an Order >** to begin the customization. Click **Continue** on the Product Details screen.



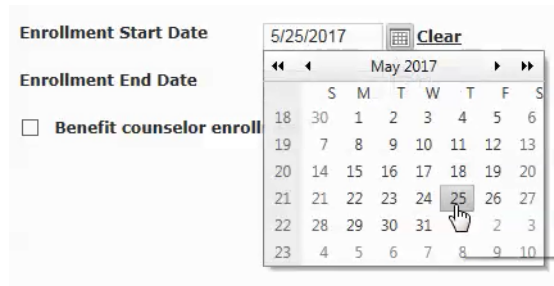
4. Customize the piece using the fields in the storefront.
5. Upload a logo for the company.
 - a. Click **Browse** to select the company logo.
 - b. Click **Upload**.



6. If you are selecting an already uploaded logo, click on it in the Logo Uploader and ensure it is highlighted.



7. If you don't have a logo, enter the **Company Name** instead and it will populate on the material.
8. For pieces that require dates:
 - a. Click the calendar icon to select the dates.
 - b. Click **Clear** to delete the selected date.





9. Click **Next** in the bottom right corner to continue to the Proof step.
10. Click the "PROOF" button to view a PDF proof of your customized piece.
11. Select the **Proof is approved** * checkbox to confirm the information entered and defaults are correct.






12. If you are printing materials, include the **Quantity** and **Ship Date** (the Ship Date is the date the materials will be *sent*, not *received*).
13. Click **Add to Cart** in the bottom right. The system will automatically take you to your Shopping Cart.

Navigating Your Shopping Cart

In your Shopping Cart, you can review the proof, label your order, delete it from your cart or save it for a later checkout.

1. To view a proof, select the thumbnail image of your material.
2. To label your order, hover to the right of the Product Name and a pencil icon will appear. Click the pencil icon and type in the field the detailed description.
3. The **X** can will remove the item from your shopping cart. 
4. The shopping cart with clock will save the item in your Saved Items – To Check out later. 
5. Click **Checkout** in the bottom right to complete your order.
6. Click **Home** in the top navigation or **Continue Shopping** in the bottom right, to place another order.

The screenshot shows the top navigation bar with 'Home', 'My Account', and 'Cart' buttons. Below is the 'Shopping Cart' section with a table of items. A 'Subtotal' box is at the bottom right with 'Continue Shopping' and 'Checkout' buttons.

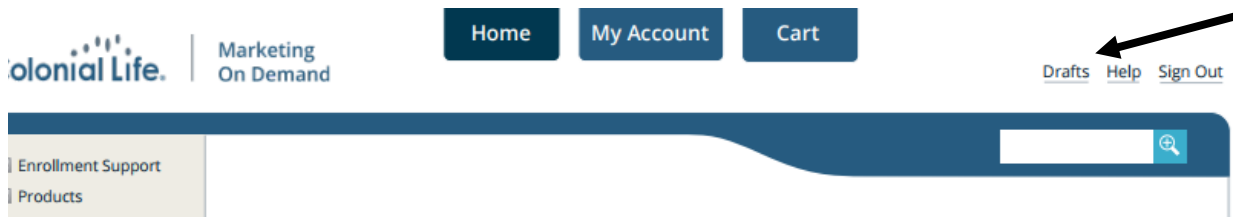
Name	Units	Price
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <p>3. and 4.</p>   </div> <div> <p>1.</p>  </div> <div style="margin-left: 20px;"> <p>2.</p> </div> </div> <p>Premier Client Poster</p> <p>Details</p> <p>Edit</p>	Total: 1 Item	-

Subtotal
6.
5.

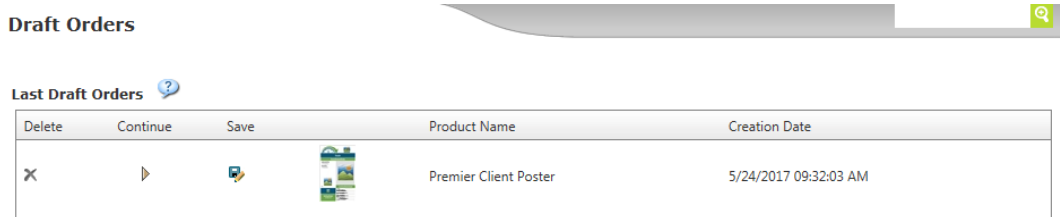
Continue Shopping
Checkout

Draft Orders: Accessing a Draft or Saving for Later

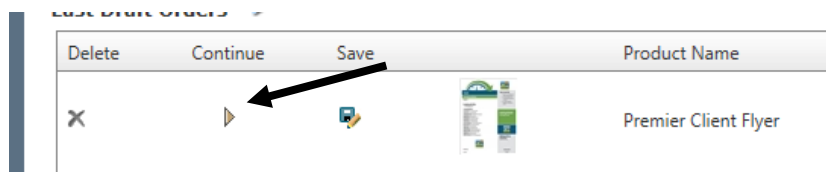
1. Click Drafts at the top right:



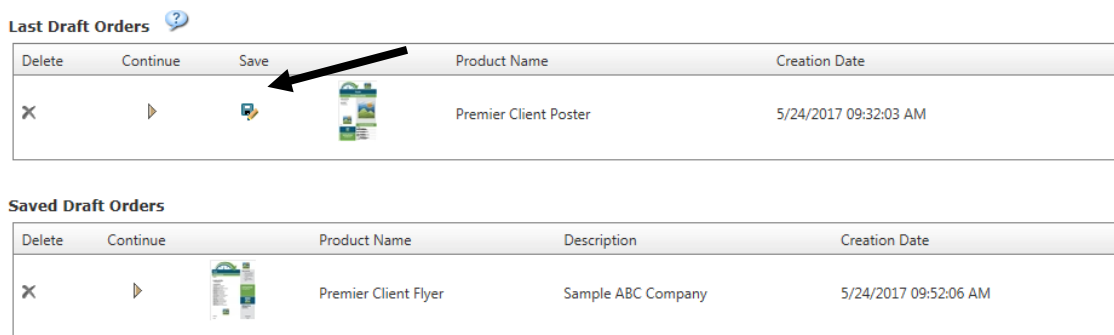
2. The three most recent pieces you have begun will show in **Last Draft Orders**.



3. Select the Continue arrow to resume work on a draft.

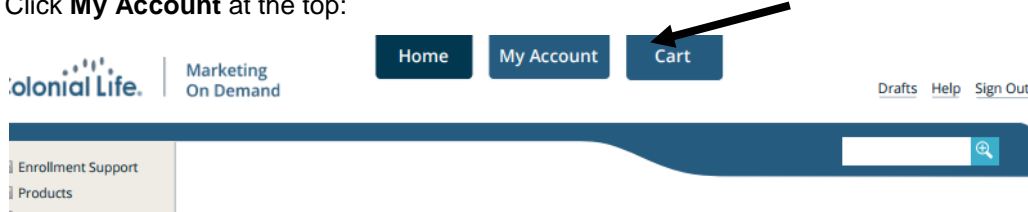


4. Only three drafts show in **Last Draft Orders**; each new draft deletes the oldest. Save any drafts that you want to continue working on in the future. Click the floppy disk and pencil icon and add a description to help identify the piece later. It will then appear in the **Saved Draft Orders** section:



Accessing Previous Order Information

1. Click **My Account** at the top:



2. Select **Order History**
3. View all materials in an order by scrolling over the Order# in the left column:

Orders List [Clear search results](#)



Order#	Order Date	Total Amount	Status	
821953	5/11/2017	\$11.86 USD	Shipped	Show receipt
660053	2/24/2017	\$0.00 USD	In Progress	Show receipt
Included products:				
43	Premier Client Poster (order item ID: 125993)		In Progress	Show receipt
	Premier Client Flyer (order item ID: 125996)			

4. Click **Order#** to see the details of the order. From this screen you are able to:
 - a. To reorder click Reorder next to the specific product.
 - b. View a proof by clicking the thumbnail image to the left of the material you want to see.
 - c. Download the PDF using the Download arrow.

Order Details

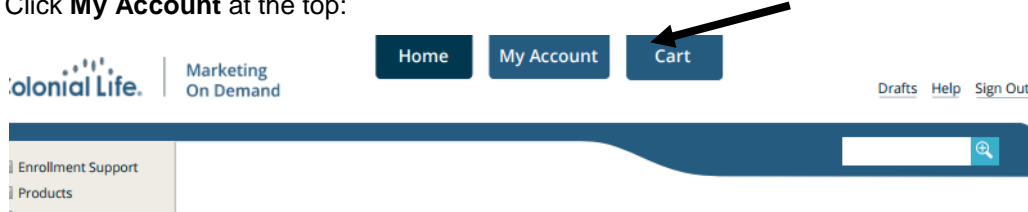
Order#: 821953 [Show receipt](#)
Payment details: Offline Billing

Purchase details

	Product	Units	Price	Download	
b.	 Premier Client Poster Details	a. Reorder	Total: 5 Items \$0.00 USD	c. 	125993

Re-ordering Materials

1. Click **My Account** at the top:



2. Select **Order History**
3. View all materials in an order by scrolling over the Order# in the left column:

Orders List [Clear search results](#)

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Order Details

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 Payment details: Offline Billing

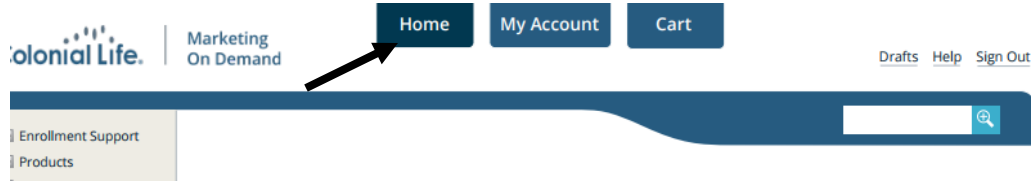
Purchase details

Product	Units	Price	Download
Premier Client Poster Details	Reorder	Total: 5 Items \$0.00 USD	 125993

Return to Store Error Message

If you receive a Return to Store message or the following: "Error occurred. Sorry for the inconvenience. Return to Store:"

1. Click back to the home page from the top navigation.

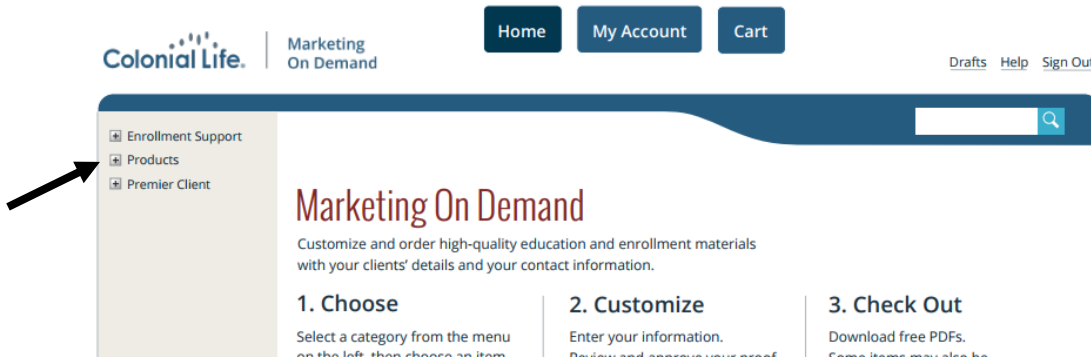


2. Re-select the product you are hoping to order. You also may be able to access an order from your Drafts (top right) if you were midway through an order.

This is a known system issue and unfortunately you must begin the customization process again when it happens.

Finding the Materials for a Specific Product

1. Select the Products section on the left-hand navigation, by clicking the + sign next to products.



2. This will show the list of Products you can create customized materials for. To begin, Individual Medical Bridge and Group Medical Bridge materials are available.
 - a. If you are not able to see IMB or GMB, it may be because you have not completed a Mastery Exam for that product.

Connecting to Harmony for a Product Piece

1. Select the Harmony account for your case from the Storefront dropdown menu.
2. If no Harmony cases are showing (“No Harmony accounts found”, click **Refresh Harmony data**.
3. If you select a case that does not have the correct product for the material you are creating, you will see a message that “[PRODUCT NAME] was not found for this account.”
 - a. Ensure you are selecting the correct account and that the product material you are creating is included in that account in Harmony.