

Sales Toolkit Quick Start Guide

The basics to get you up and running with pre-sales marketing material.



o begin using the Sales Toolkit, first set up your profile. Once completed, it will be used to customize your material.

On your initial visit, the profile window will come up. If it does not, select your User Profile from your name icon.

A Home	Martin Kircher			
	My Profile 2			
Shop	User Profile			
Cart	Seminar Information 2017			
12	Seminar Information 2018			
Martin Kircher	Profile and Permission Management			
	My Orders			

Fill out the fields. Click the Edit button to begin.

Preferred First Name	Martin Kircher CA123456		Hours Of Operation Start	7:30		
Preferred Last Name			Hours Of Operation End	8		
License Number			Days Worked Per Week	1	<u>~</u>	
Telephone Number	1-805-555-1212	Ext.	XXX	Email Address or Website	martin.kircher@anthem.com	
TTY	711					



Add your agent photo.

1. Select **Upload Image** under the Profile Image (Optional) section.

Preferred First Name	Victoria		
Preferred Last Name	Sullivan		
License Number	123456		
Telephone Number	1-813-555-1212	Ext.	XXX
TTY	711		
		1	

2. Click **Upload Image** button, browse for your JPEG image, and double-click the JPEG file.

Reminder: JPEG file name must match your Sales Toolkit license number.

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Agent Photo Upload Upload Image		Clear	
		Canoel	
Choose File to Upload			
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Organize Vew f	older		
Organize Favorites	older Name	Туре	Size



 After uploading the image, you will have the opportunity to center it or zoom in and out using the buttons at the top right corner. Click the green checkmark once complete. Then click Save.





4. Your part is done. Your photo will be reviewed by the marketing team before it is available for use (the review process is one business day).

Photo Guidelines

- Smile 🙂
- Selfies are NOT acceptable
- Professional headshot only shoulders up
- Individual photos only (no pets, filters, family, friends, logos, cards, etc.)
- Portrait orientation
- Gray or white background
- Suggested Attire: Anthem and Amerigroup blue (Royal blue) polo with or without logo, or button-down shirt. Note: Studies have shown that agents who are dressed in polos (more casual) are more relatable than those in suits.
- Avoid hats, T-shirts, symbols, sunglasses, patterned clothes
- Business appropriate credible, confident and professional
- The photo's file name must be the same as your license number in your sales toolkit User Profile. For example, 12345.jpg. **Note: This is the license number that populates in the agent block on your materials.**
- Best size is 540x360



Placing an order

1. From the **Home** page, select **Shop** or your licensed state.



2. Depending on how you entered, click on your state and brand.





Placing an order continued

3. Click the Product type.



4. Click the Material type.

Medicare Advantage Plan			🐂 View Order
BROCHURES Brochures	CARDS/ POSTCARDS	FLIERS	PLAN HIGHLIGHT CHARTS PHC Plan Highlight Charts
POSTERS	PRESENTATIONS		



Placing an order continued

5. Click a document name. Once in the document, customize it using the dropdown and radio buttons (if available) and/or populating event locations, dates and times.



6. After viewing the proof, click **Next**. You can choose between print or electronic versions. If choosing print, enter the quantity. Then click the **Add To Order** button to place it in your cart.





Placing an order continued

7. You can continue to add marketing pieces by clicking the **Shop** button in the left margin and selecting more items, or clicking the "bread crumbs" across the top.

Arrow Home	Shop / CALIFORNIA / Anthem Blue Cross / Medicare Advantag	e Plan /	liers
Shop		Fliers 🕶	Search for

Completing your order

To submit your order, go to your cart by clicking the **View Order** button or or by clicking the **Cart** button in the left margin.

Ame	Shop / 2018 / CALIFORNIA / Anthem Blue Cross / Medicare	vantage Plan / Fliers	
Shop		Fliets - Search for	٩
Cart	-	Added to Order: S0 Premium Call Me Filer 2PG CA MA 2018	er

1. Review your order and click the **Proceed to Checkout** button.



Anthem.

Completing your order continued

2. Click **My Addresses**, select a shipping address, and click **Next**.

Shipping Addresses		
	Click on image in the header to see customized or larger version	
	Y0114_18_32050_U_001 Total: 1	
My Addresses		◆ Next

- 3. Click **Next** on the **Shipping Methods** window.
- 4. To submit your order, click the **Submit Order** button.



5. You will receive an automated email confirming your order. Your items should arrive in approximately five business days.



