

S3 – Web to Print Ordering System Getting Started Guide



Physicians
Mutual[®]

Insurance for all of us.[®]

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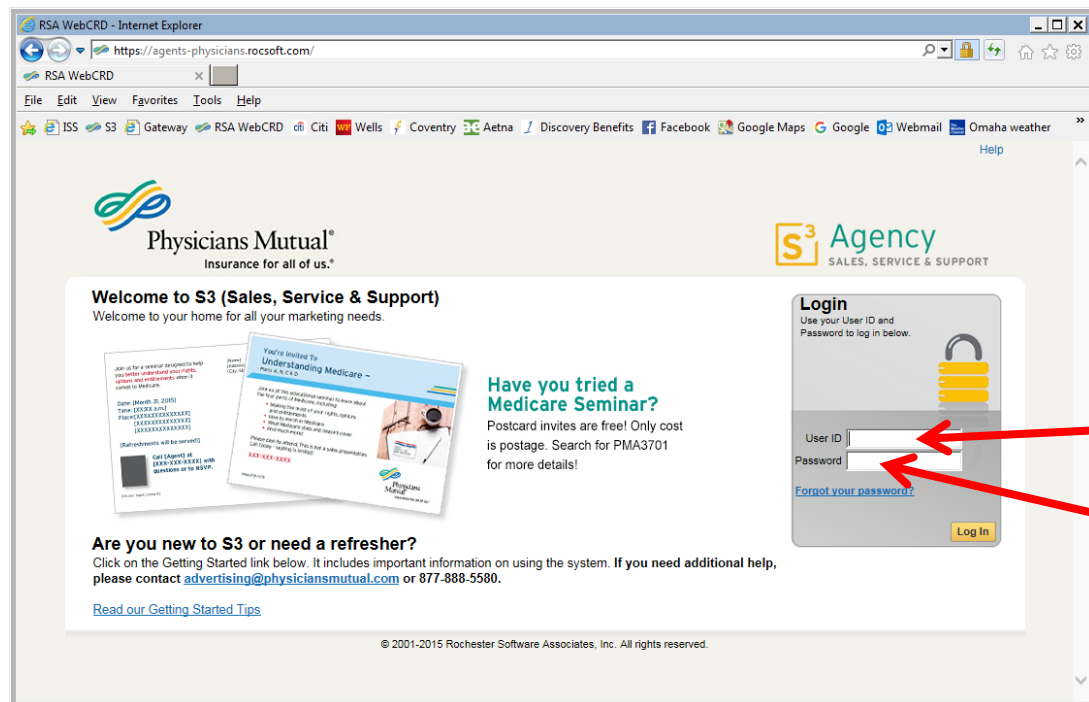
**If you need additional help, please contact the
Advertising Support Team at
advertising@physiciansmutual.com or 877-888-5580.**

Welcome to S3!

S3 is our sales, service and support system for all your marketing needs. It is a browser-based ordering system, enabling users to order, manage, and reorder documents and items at our in-house print facility.

Logging In

Initial Login



Go to S3 ([S3.physiciansmutual.com](https://s3.physiciansmutual.com)) to access the system.

User ID: Agents, Division Managers and Assistant Division Managers will use NPN
Initial password: Password1

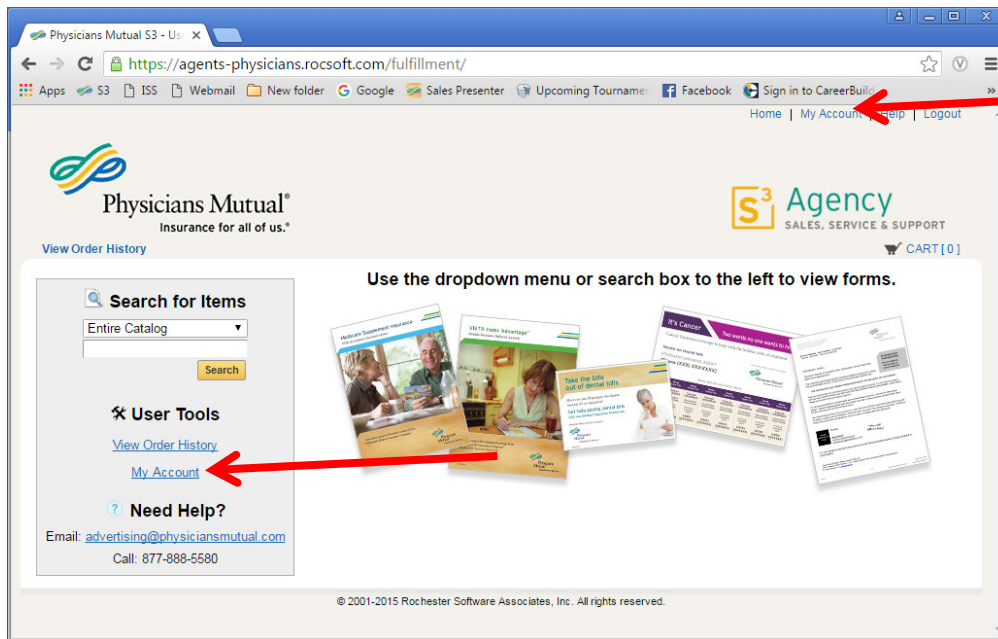
All information in the My Account screen is populated from an agent's DMS account. If any of the information is not correct, agent must request changes in DMS first. Agent should contact the DOC to make changes with the Contracting area to update DMS. Anytime a change is made to DMS contact information, it will populate the next day in S3.

Please note:

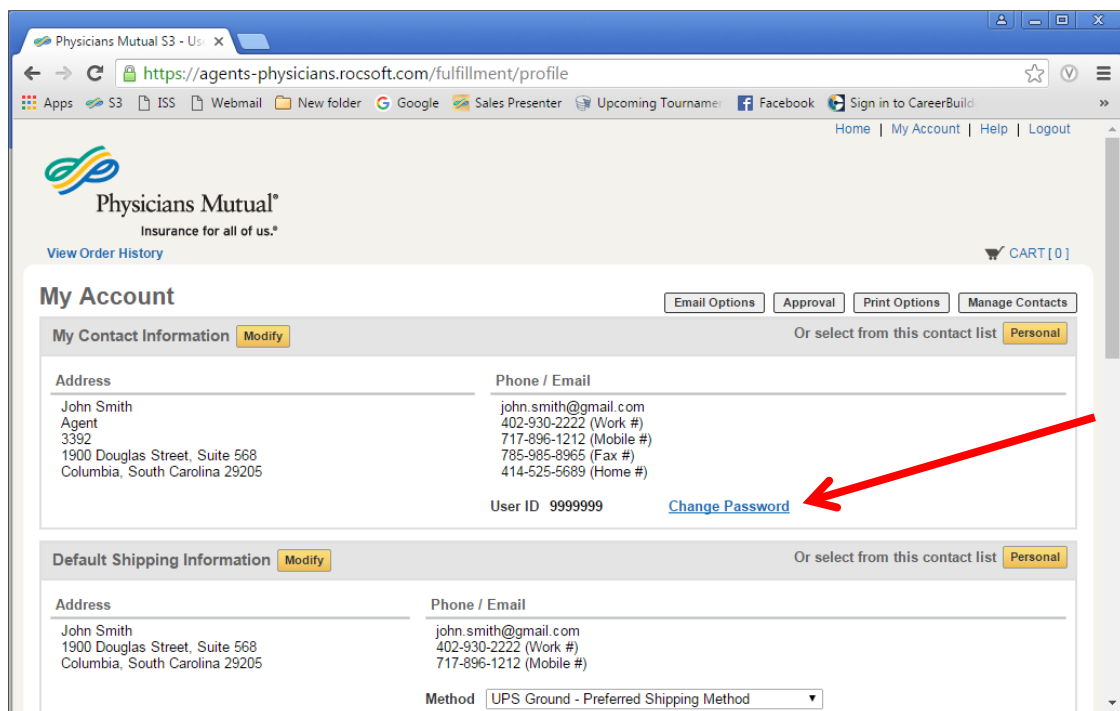
- Work phone and fax number must be the office numbers.
- Address in the "My Contact Information" section must be the Division Office address.

Reset Password During Initial Setup

At this time you also need to set a new password. Click My Account.



Click the Change Password Link.




Once you click the link, a pop up message will appear. Password must contain: Minimum 8 total character(s), Minimum 1 uppercase character(s), Minimum 1 lowercase character(s), Minimum 1 numeral(s)

Physicians Mutual S3 - User X

https://agents-physicians.rocsoft.com/fulfillment/profile

Apps S3 ISS Webmail New folder Google Sales Presenter Upcoming Tournament Facebook Sign in to CareerBuilder

Home My Account Help Logout

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[View Order History](#) CART [0]

My Account

Email Options Approval Print Options Manage Contacts

My Contact Information Modify

Or select from this contact list Personal

Address

John Smith
Agent
3392
1900 Douglas Street, Suite
Columbia, South Carolina 29205

Change Password

Enter current password

New Password **WEAK**

Password must contain: Minimum 8 total character(s),
Minimum 1 uppercase character(s), Minimum 1 lowercase
character(s), Minimum 1 numeral(s)

Confirm new password

Cancel Change Password

Default Shipping Information

Address

John Smith
1900 Douglas Street, Suite 568
Columbia, South Carolina 29205

Phone / Email

john.smith@gmail.com
402-930-2222 (Work #)
717-896-1212 (Mobile #)

Method UPS Ground - Preferred Shipping Method

Forgot Your Password

If you forget your password, you can reset on your own. Click the Forgot your password link.

RSA WebCRD - Internet Explorer
https://agents-physicians.rocsoft.com/

File Edit View Favorites Tools Help

ISS S3 Gateway RSA WebCRD Citi Wells Coventry Aetna Discovery Benefits Facebook Google Maps Google Webmail Help

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S³ Agency
SALES, SERVICE & SUPPORT

Welcome to S3 (Sales, Service & Support)
Welcome to your home for all your marketing needs.

Have you tried a Medicare Seminar?
Postcard invites are free! Only cost is postage. Search for PMA3701 for more details!

Login
Use your User ID and Password to log in below.

User ID
Password

[Forgot your password?](#)

Log In

Are you new to S3 or need a refresher?
Click on the Getting Started link below. It includes important information on using the system. If you need additional help, please contact advertising@physiciansmutual.com or 877-888-5580.

[Read our Getting Started Tips](#)

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Enter your user ID and email. Click Retrieve Password.

RSA WebCRD - Internet Explorer
https://agents-physicians.rocsoft.com/open/forgotpasswd

File Edit View Favorites Tools Help

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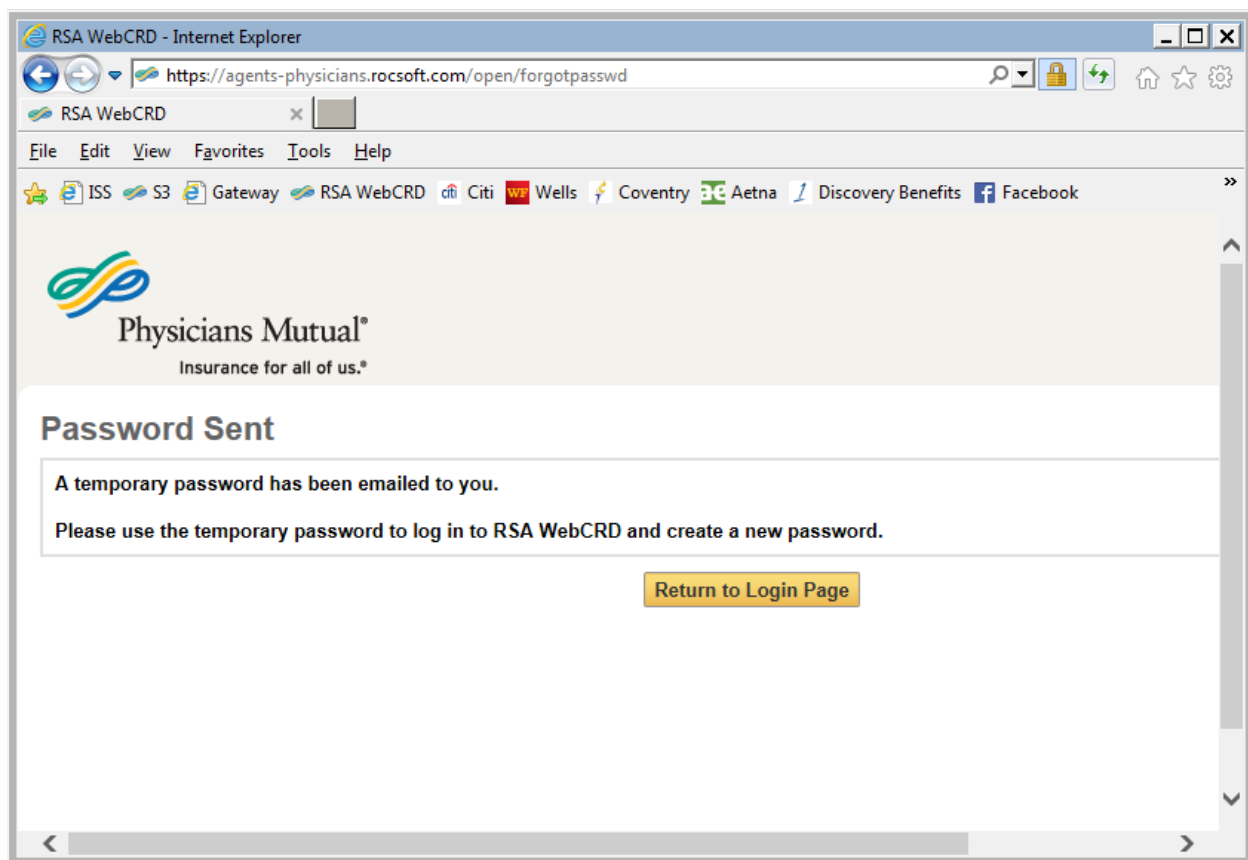
Retrieve Password

To retrieve your RSA WebCRD password, enter your User ID and the email address associated with your account:

User ID
Email

Cancel Retrieve Password

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My Account

The My Account section allows you to manage your shipping addresses and contact information. The contact information shown will be used to populate all variable data catalog items.

As a reminder: My Contact Information is populated from an agent's DMS account. If changes are needed in the system, agent must request update in DMS first. The My Contact Information address should always stay as the Division Office Address.

You can change the Shipping Information to include a home address to ship to. Click Modify.

Physicians Mutual S3 - User ID [14966645] - Internet Explorer

https://agents-physicians.rocsoft.com/fulfillment/profile/address/personal/detail

Physicians Mutual S3 - Us...

File Edit View Favorites Tools Help

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Home | My Account | Help | Logout

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View Order History

CART [0]

My Account

Email Options Approval Print Options Manage Contacts

Or select from this contact list **Personal**

My Contact Information [Modify](#)

Address	Phone / Email
John Smith Agent 3636 2377 Gold Meadow Way, Suite 878 Sacramento, California 94229	john.smith@gmail.com 402-930-3333 (Work #) 402-930-3343 (Mobile #) 402-930-4590 (Fax #) 402-930-8962 (Home #)

User ID 14966645 [Change Password](#)

Default Shipping Information [Modify](#)

Or select from this contact list **Personal**

Address	Phone / Email
John Smith 2377 Gold Meadow Way, Suite 878 Sacramento, California 94229	john.smith@gmail.com 402-930-3333 (Work #) 402-930-3343 (Mobile #)

Method

Default Billing Information [Modify](#)

Or select from this contact list **Personal**

Address	Phone / Email
John Smith 2377 Gold Meadow Way, Suite 878 Sacramento, California 94229	john.smith@gmail.com 402-930-3333 (Work #)

[Top](#)


Add your Home Address and click Apply changes to my Shipping address only. This will allow you to choose between shipping addresses once you are in the Cart page.

Physicians Mutual S3 - User ID [14966645] - Internet Explorer
https://agents-physicians.rocsoft.com/fulfillment/profile

Physicians Mutual S3 - Us...

File Edit View Favorites Tools Help

ISS S3 Gateway RSA WebCRD Citi Wells Coventry Aetna Discovery Benefits Facebook Google Maps Google Webmail
Home | My Account | Help | Logout

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[View Order History](#) CART [0]

Default Shipping Information

Make desired changes to your default shipping information. The Print Center may use this information to generate a shipping label.
Fields with an * are required at all times, fields with an * are required to submit an order.

Address		Phone / Email	
First name *	John	Email	john.smith@gmail.com
Last name *	Smith	Work #	402-930-3333
Department		Mobile #	402-930-3343
Street 1	1458 Oak Street		
City	Sacramento		
State	California		
Zip	94229		

Click this button after adding Home Address.

Actions:

☐ Apply changes to my default addresses that use this information:
Personal, Billing, Shipping

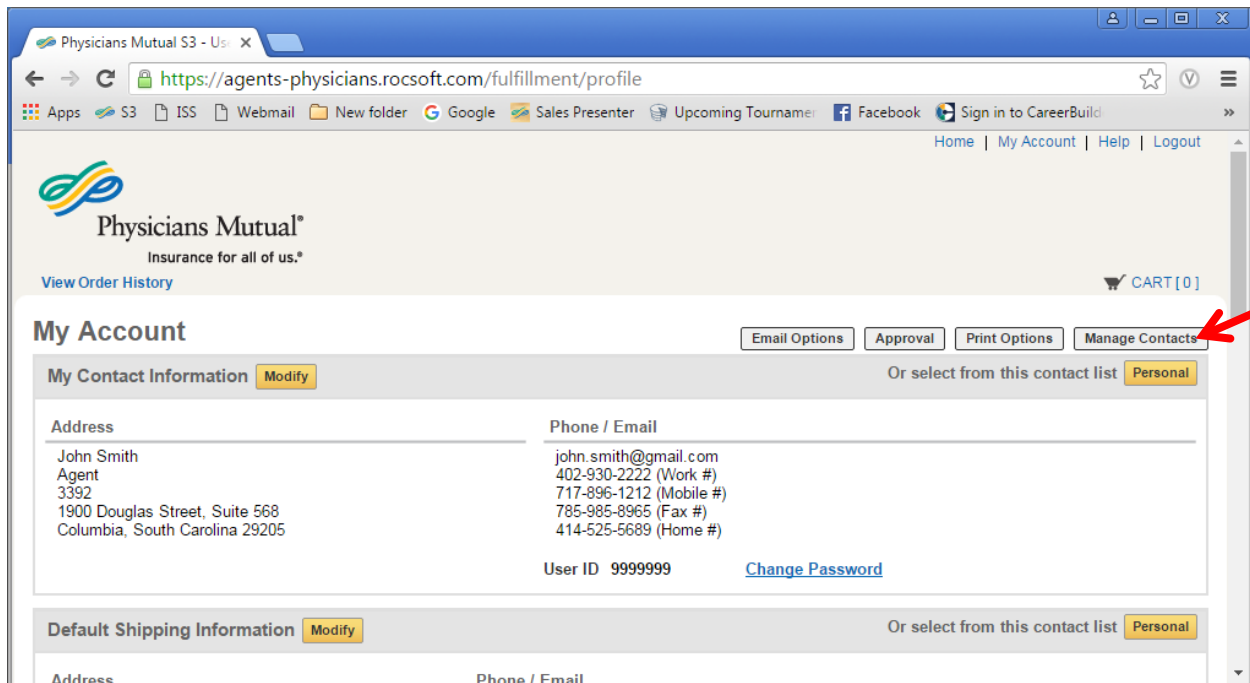
☒ Apply changes to my Shipping address only.
This will create a new contact in your Personal Contacts list.

Cancel Save

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Manage Contacts

You can add multiple contact addresses to ship your materials. Click Manage Contacts.



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https://agents-physicians.rocsoft.com/fulfillment/profile

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Home | My Account | Help | Logout

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View Order History

CART [0]

My Account

Email Options Approval Print Options **Manage Contacts**

My Contact Information [Modify](#) Or select from this contact list [Personal](#)

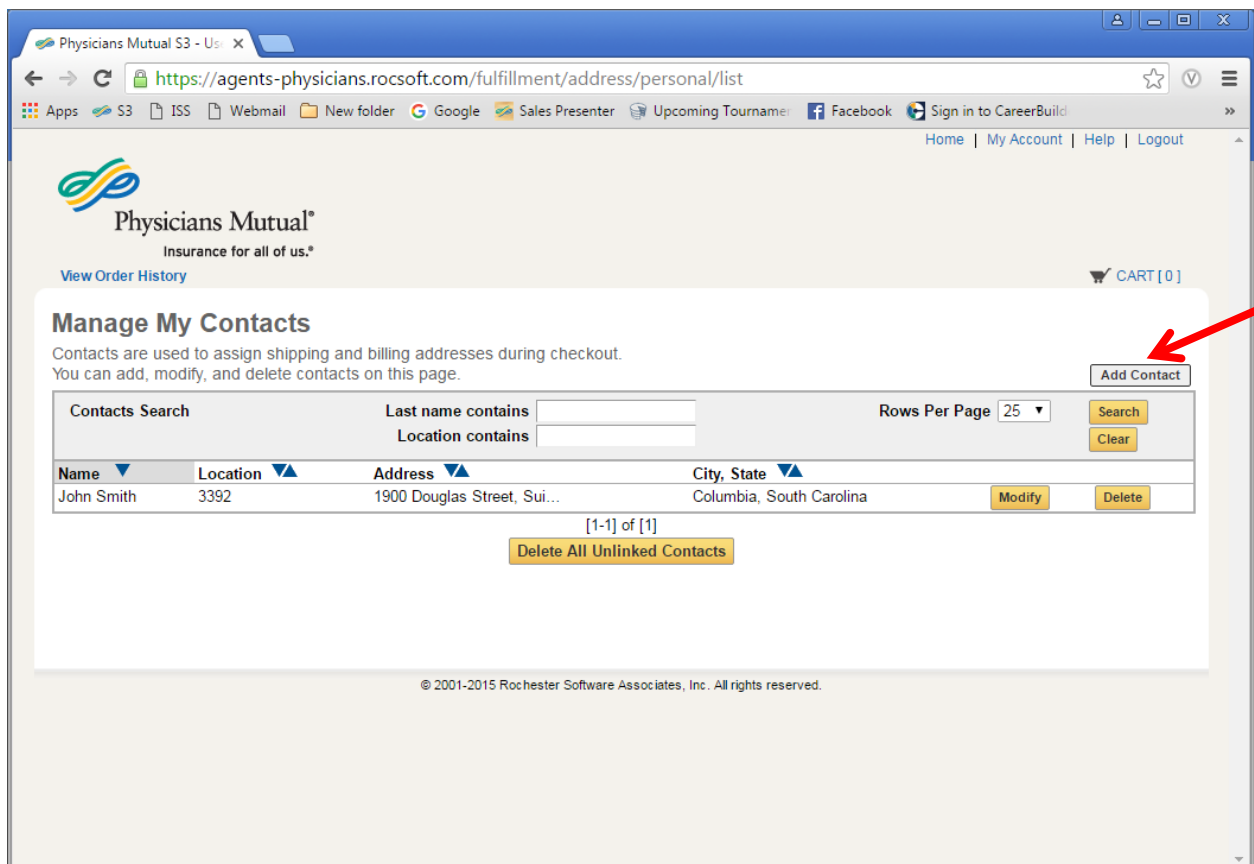
Address	Phone / Email
John Smith Agent 3392 1900 Douglas Street, Suite 568 Columbia, South Carolina 29205	john.smith@gmail.com 402-930-2222 (Work #) 717-896-1212 (Mobile #) 785-985-8965 (Fax #) 414-525-5689 (Home #)

User ID 9999999 [Change Password](#)

Default Shipping Information [Modify](#) Or select from this contact list [Personal](#)

Address	Phone / Email
----------------	----------------------

Click Add Contact.



Physicians Mutual S3 - Us: X

https://agents-physicians.rocsoft.com/fulfillment/address/personal/list

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View Order History

CART [0]

Manage My Contacts

Contacts are used to assign shipping and billing addresses during checkout.
You can add, modify, and delete contacts on this page.

[Add Contact](#)

Contacts Search Last name contains Location contains Rows Per Page 25 Search Clear

Name	Location	Address	City, State	
John Smith	3392	1900 Douglas Street, Sui...	Columbia, South Carolina	Modify Delete

[1-1] of [1]

[Delete All Unlinked Contacts](#)

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Physicians Mutual S3 - Us

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[View Order History](#) CART [0]

Add Contact

For use as a recipient, provide the details necessary for your ordered items to reach their destination.
For use with billing, include any required account codes.
Fields with an * are required. Fields with an + are required for use as a recipient.

Address	Phone / Email
First name*	Email
Last name*	Work #
Job title	Mobile #
Location	Fax #
Department	Home #
Street 1	Account Codes
City	Charge Code
State Nebraska	
Zip	

[Cancel](#) [Save](#)

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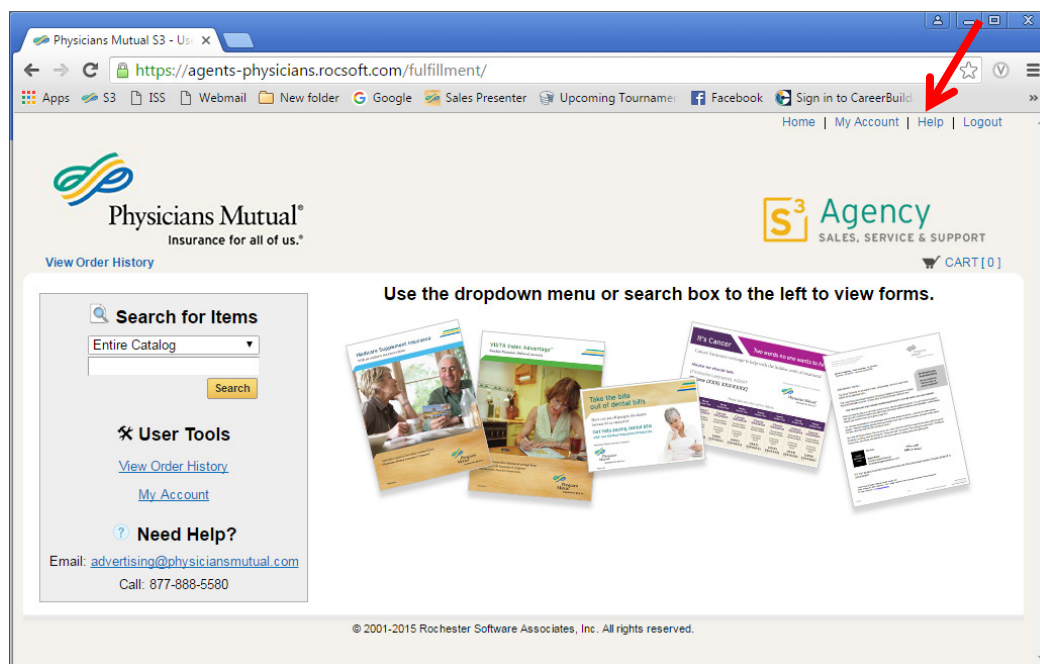
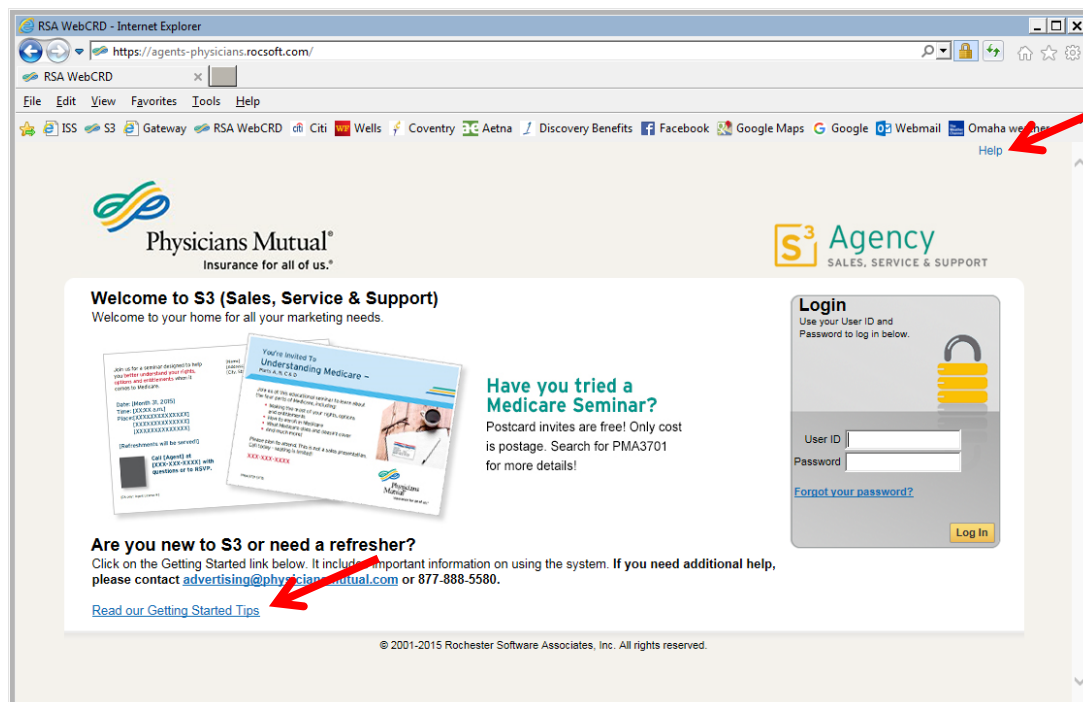
Session Activity

You are automatically logged out of S3 if there is no activity for 60 minutes.

Using Online Help

The Help link at the top of each page opens online help in a new tab of your browser. The online help window shows a topic that explains the current page (such as the Ordering Home page or the Cart page). You can click toolbar buttons at the top of the Help window to navigate to other topics, search for information, and print topics.

Please Note: Some items shown in the help link may not be available in our site settings. Please use the *Getting Started Tips* for more specific help related to our site.



Search for Items

You can search for items two ways.

Search by Browsing Folders

Use the dropdown menu to select a section to browse.

The screenshot shows a web browser window with the URL <https://agents-physicians.rocsoft.com/fulfillment/>. The page features the Physicians Mutual logo and the S³ Agency logo. A dropdown menu titled "Search for Items" is open, showing options: "Entire Catalog", "My Files", "Catalog", "Greeting Cards", "Office Supplies", "Promo Items", and "South Carolina". A red arrow points to the "Catalog" option. To the right of the dropdown, there is a text box with the text "Use the dropdown menu or search box to the left to view forms." Below the dropdown, there is a link "My Account" and a "Need Help?" section with email and phone contact information. The footer contains the copyright notice: "© 2001-2015 Rochester Software Associates, Inc. All rights reserved."

You will then see a folder menu to select from. You can see the number of items within each folder.

Physicians Mutual S3 - User

https://agents-physicians.rocsoft.com/fulfillment/from_shared_folder?groupCustomerID=70

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Home | My Account | Help | Logout

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View Order History

CART [0]

Home > Catalog > South Carolina

Select By Folder

Browse for items by selecting a folder from the list below, or search for items using the search bar.
Use the Catalog link to select a different State

Item Search Search Clear

Search Rows Per Page 25 Sort By Item A-Z

[Show Advanced Search Criteria](#)

Folders	Items
Annuity - Advertising	2
Annuity - Application Booklets	5
Annuity - Appointment Materials	18
Business Cards	5
Cancer - Advertising	2
Cancer - Application Booklets	1
Cancer - Appointment Materials	1
Company Info	3
Dental - Advertising	5
Dental - Application Booklets	1
Dental - Appointment Materials	1
Life - Advertising	3
Life - Application Booklets	6
Life - Appointment Materials	13
Medicare Supplement - Advertising	7
Medicare Supplement - Application Booklets	1
Medicare Supplement - Appointment Materials	2
Miscellaneous - Advertising	15
Seminars - Medicare	11
Seminars - Retirement	1
Seminars - Social Security	2

[1-21] of [21]

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If you use the search box within the folder menu (Example: Medicare Supplement – Appointment Materials) it will only find items in that folder. You need to click back to Catalog to search all sections.

Physicians Mutual S3 - Us: X

https://agents-physicians.rocsoft.com/fulfillment/from_shared_files?folderID=102

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View Order History

CART [0]

Home > Catalog > South Carolina > Medicare Supplement - Appointment Materials

Select Items

Add items to your cart by entering quantities and clicking **Add to Cart**.
For template documents, click **Customize Forms** to set up the template and add it to your cart. All items with quantities are added to your cart first.

Item Search

Search Rows Per Page 25 Sort By Item A-Z

[Show Advanced Search Criteria](#)

Med Supp vs. MA Flyer (10 Things to Think About Flyer) \$0.00
PMA3782
This is a free item. Please select free supplies from payment options.
Qty **Add to Cart**
Located in South Carolina / Medicare Supplement - Appointment Materials

Medicare Supplement Brochure \$0.00
PMA3255SC-0416
This is a free item. Please select free supplies from payment options. As a reminder: outline of coverage located in application booklet must be used with the brochure.
Qty **Add to Cart**
Located in South Carolina / Medicare Supplement - Appointment Materials

[1-2] of [2]
Add All to Cart

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Physicians Mutual S3 - Us: X

https://agents-physicians.rocsoft.com/fulfillment/from_shared_groups

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Home | My Account | Help | Logout

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View Order History

CART [0]

Home > Catalog

Select By State

Browse for items by selecting a State, or search for items using the search bar.

Item Search

Search Rows Per Page 25 Sort By Item A-Z

[Show Advanced Search Criteria](#)

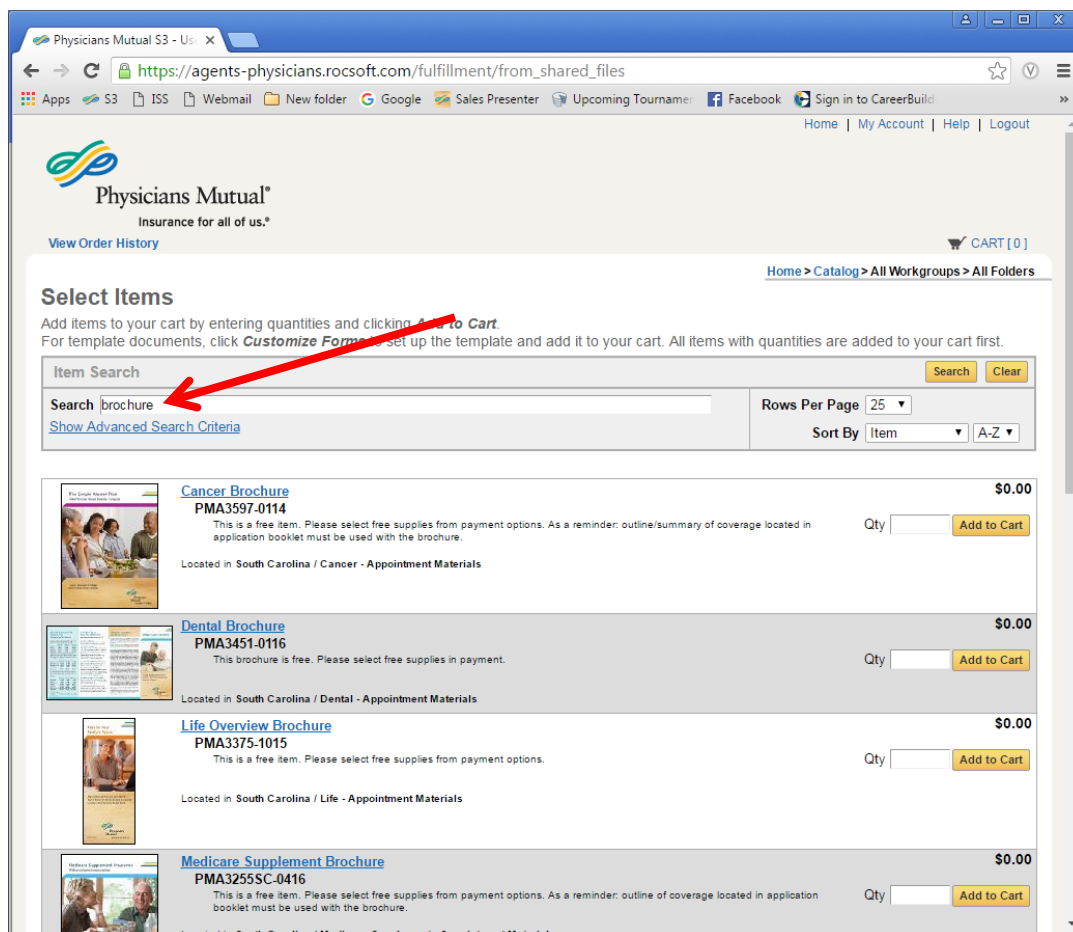
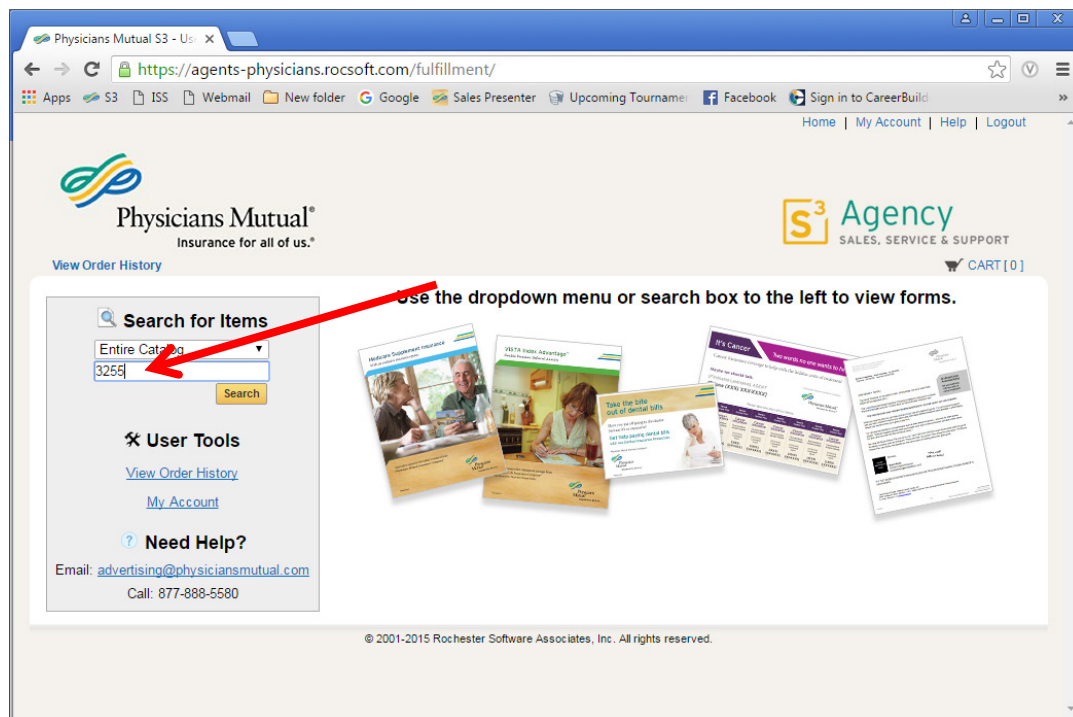
Workgroup	Location	Dept.	Folders	Items
Office Supplies			1	6
Promo Items			2	61
South Carolina			21	105

[1-3] of [3]

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Search by Keyword or Form Number

You can also search by keyword or form number.



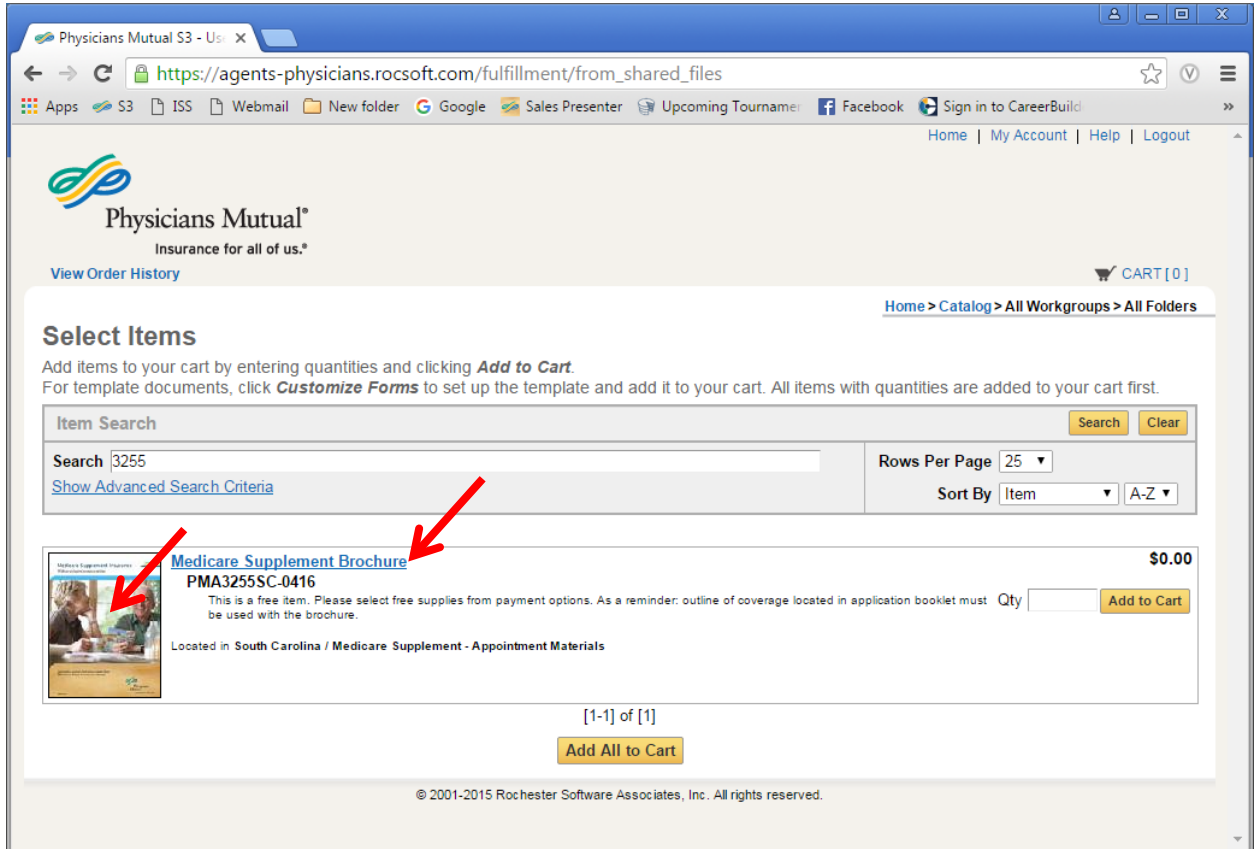
Viewing an Item

Thumbnail

You can view a proof of the item by clicking the thumbnail image.

Title Link

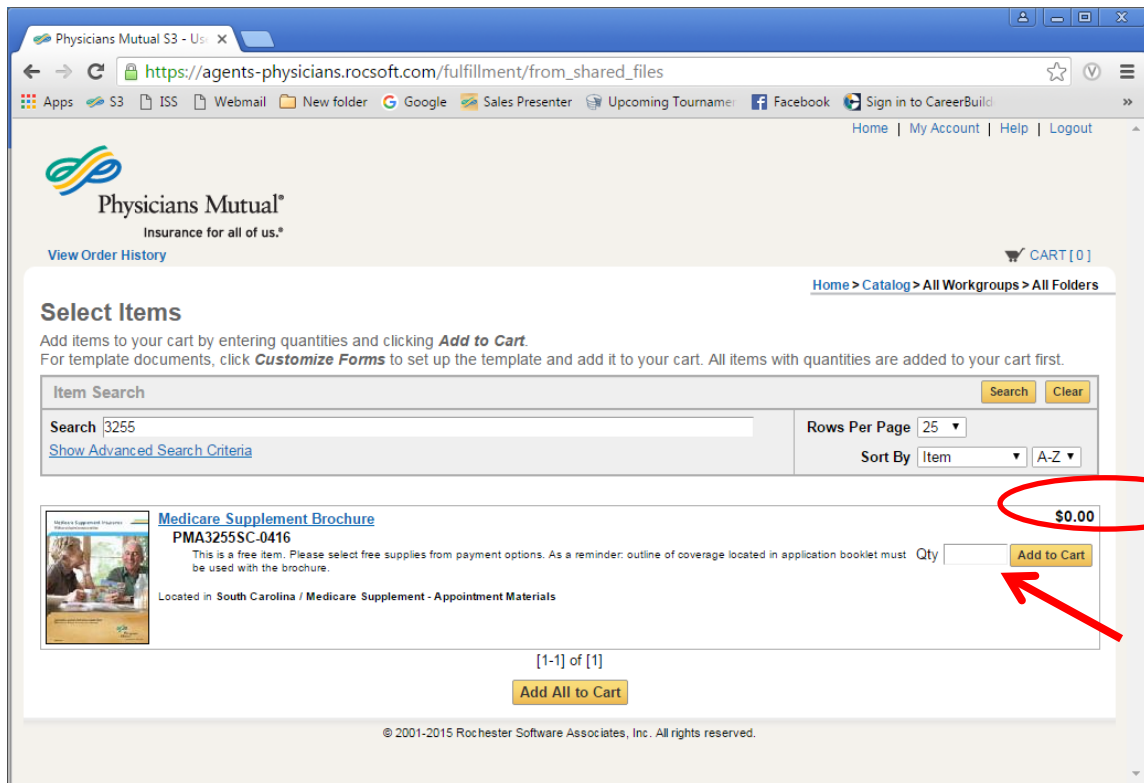
You can view the date the item was added to the catalog by clicking the title link. If the item is an in-stock item, the quantity on hand will be shown.



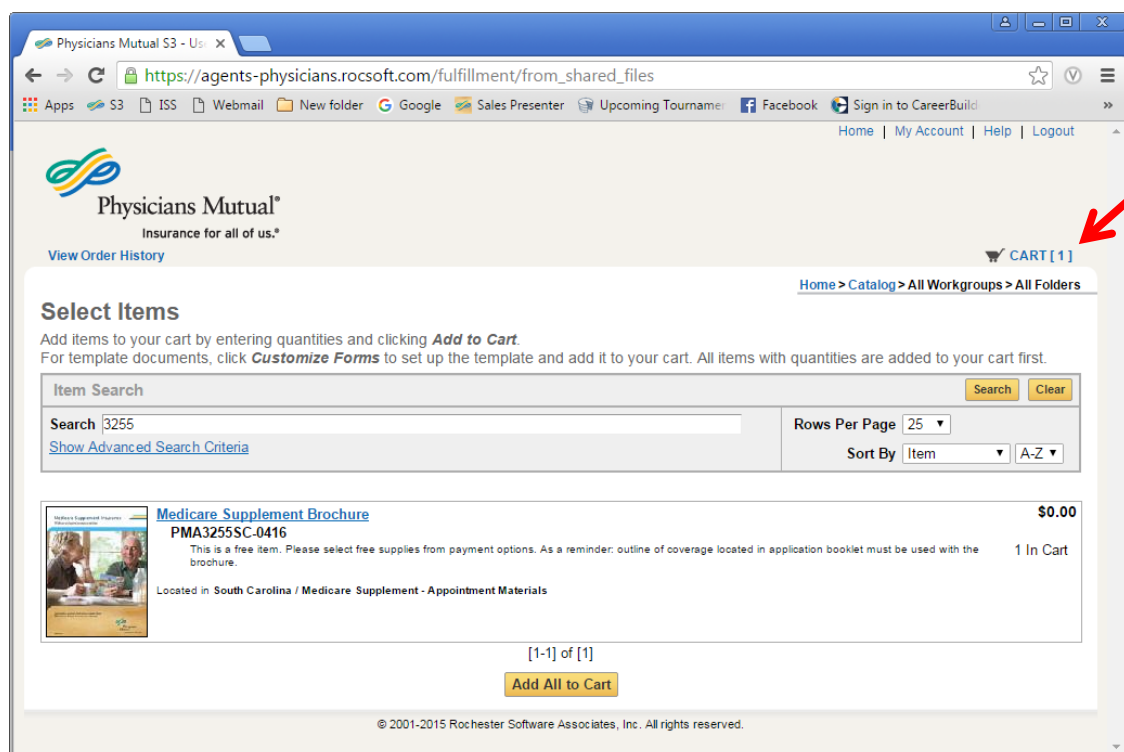
Placing An Order

Items with No Cost

Items that are free or paid for by the company will be listed as \$0.00. Add the quantity that is needed in the box and hit Add to Cart.



Click the cart link.



You will need to provide an Order Name.


The screenshot shows a web browser window with the URL <https://agents-physicians.rocsoft.com/fulfillment/shoppingCart>. The page header includes the Physicians Mutual logo and navigation links. The main content area is titled 'Cart' and displays 'Item 1' as 'Medicare Supplement PMA3255SC 6 Pages'. A modal window titled 'Provide an Order Name' is open, prompting the user to enter an order name. A red arrow points to the 'Order name' input field. The modal also includes a 'Continue' button. To the right of the modal, the 'Order Estimate' is \$0.00 and the 'Quantity' is 1. Below the item details, the 'Shipping Information' section shows the shipping date as 'Monday, August 29, 2016' and the shipping method as 'UPS Ground - Preferred Shipping Method'. The delivery estimate is 'Tuesday, September 06, 2016'. The 'Billing Information' section is partially visible at the bottom.

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Cart
Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Cart ID 842

[Provide an optional name for your order.](#)
Naming your order can be helpful for reordering.

Item 1

 Medicare Supplement PMA3255SC 6 Pages

Provide an Order Name

Order name

Please enter a meaningful name to help the print center identify the order, and to help with future reordering.


[Continue](#)

[Continue Shopping](#)


Price \$0.00
Quantity 1

[Enter special instructions for this item.](#)

Shipping Information

I would like my order shipped by: **Monday, August 29, 2016**  *Note: Only dates when the print center is open may be selected.*

Jim Smith
1458 Oak Street
Sacramento, California 94229

Select a Shipping Method:
UPS Ground - Preferred Shipping Method  If the delivery estimate date is a Saturday or Sunday, the adjusted delivery date will be the following business day. Remember: There are no shipping charges!

Delivery Estimate:
Tuesday, September 06, 2016

[Enter shipping instructions for this recipient](#)

Billing Information

In the cart, you will be able to see when the order will be shipped and a delivery estimate.

You will need to select the shipping method. UPS Ground is the preferred shipping method. If any other method is selected, you will need to provide a reason why the item is needed earlier. You can enter shipping instructions by clicking on the link.

Items that are \$0 cost will use the charge code 2790 – Free Supplies.

Click the Place Order button.

The screenshot shows a web browser window with the URL <https://agents-physicians.rocsoft.com/fulfillment/shoppingCart>. The page is titled "Physicians Mutual Insurance for all of us." and displays a shopping cart for "Med Supp Brochure Order".

Cart Details:

- Cart ID: 842
- Order name: Med Supp Brochure Order
- Order Estimate: \$0.00

Item 1:

- Medicare Supplement Brochure PMA3255SC-0416, 6 Pages
- Price: \$0.00
- Quantity: 1
- Continue Shopping button

Shipping Information:

- Shipping date: Monday, August 29, 2016 (Note: Only dates when the print center is open may be selected.)
- Recipient: Jim Smith, 1458 Oak Street, Sacramento, California 94229
- Shipping Method: UPS Ground - Preferred Shipping Method (selected)
- Delivery Estimate: Tuesday, September 06, 2016
- Link: Enter shipping instructions for this recipient

Billing Information:

- Order Estimate: \$0.00
- Select Payment Type: Charge Code (dropdown menu)
- Charge Code options: 2134 - DM Account, 2787 - New Agent Business Cards, 2790 - Free Supplies (selected), 2793 - Commission Statement, 3643 - Misc
- Total Split Percentage: 0%
- Link: Enter billing information

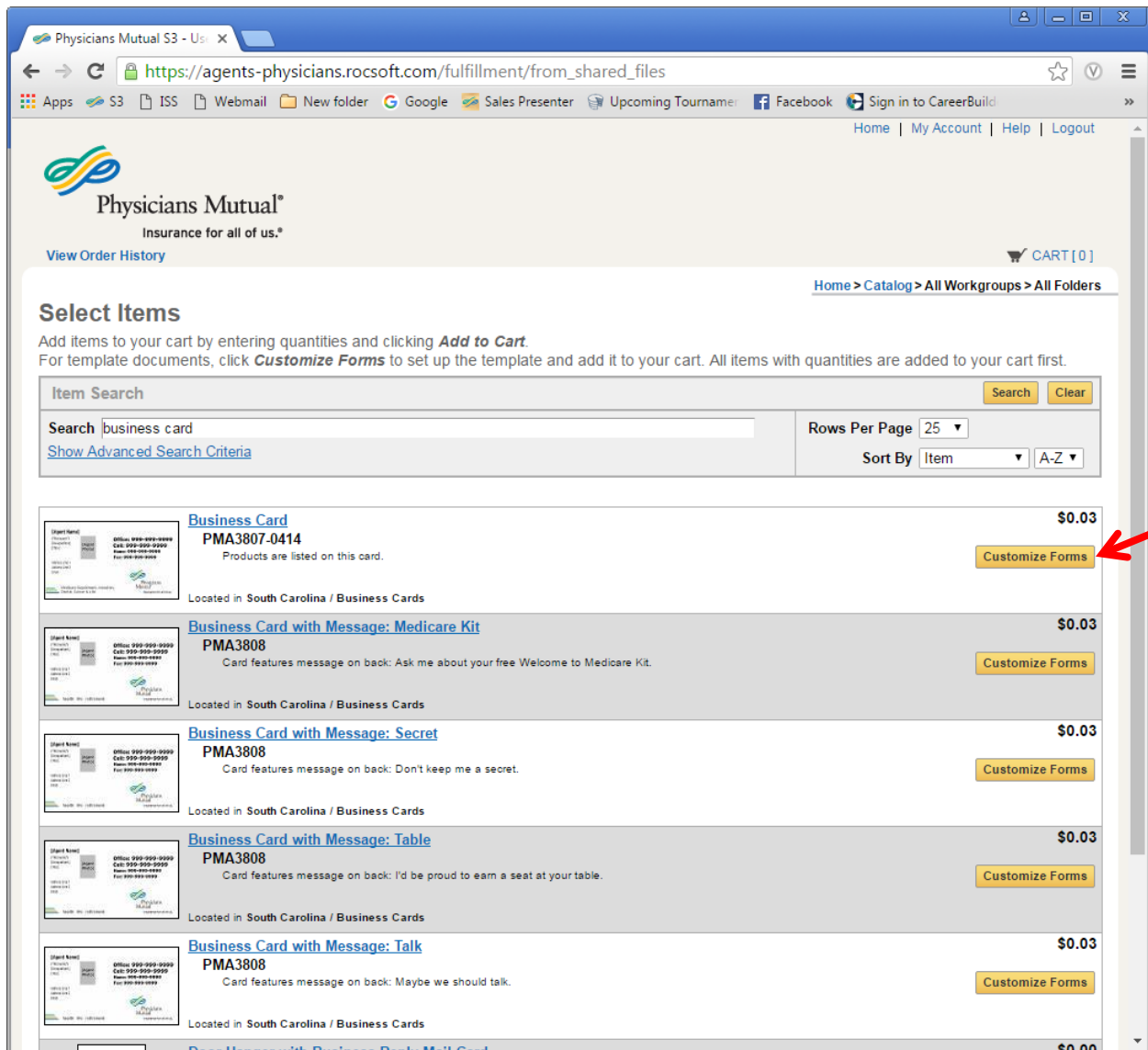
Buttons:

- Start a New Cart
- Continue Shopping
- Place Order

Red arrows highlight the shipping date, shipping method, delivery estimate, charge code selection, and the Place Order button.

Business Cards

Click the Customize Forms button.



The screenshot shows a web browser window with the URL https://agents-physicians.rocsoft.com/fulfillment/from_shared_files. The page is for Physicians Mutual, with a logo and tagline "Insurance for all of us." and a "View Order History" link. A shopping cart icon shows "CART [0]". Breadcrumbs indicate the path: Home > Catalog > All Workgroups > All Folders.

The main section is titled "Select Items" and includes instructions: "Add items to your cart by entering quantities and clicking **Add to Cart**. For template documents, click **Customize Forms** to set up the template and add it to your cart. All items with quantities are added to your cart first."

Below the instructions is a search bar with the text "business card" and a "Show Advanced Search Criteria" link. To the right of the search bar are controls for "Rows Per Page" (set to 25) and "Sort By" (set to Item, A-Z).

The product list contains five items, each with a thumbnail image of a business card, a title, a product code, a description, a location, and a price of \$0.03. Each item has a "Customize Forms" button to its right. A red arrow points to the "Customize Forms" button for the first item, "Business Card".

Item Name	Product Code	Description	Location	Price	Action
Business Card	PMA3807-0414	Products are listed on this card.	Located in South Carolina / Business Cards	\$0.03	Customize Forms
Business Card with Message: Medicare Kit	PMA3808	Card features message on back: Ask me about your free Welcome to Medicare Kit.	Located in South Carolina / Business Cards	\$0.03	Customize Forms
Business Card with Message: Secret	PMA3808	Card features message on back: Don't keep me a secret.	Located in South Carolina / Business Cards	\$0.03	Customize Forms
Business Card with Message: Table	PMA3808	Card features message on back: I'd be proud to earn a seat at your table.	Located in South Carolina / Business Cards	\$0.03	Customize Forms
Business Card with Message: Talk	PMA3808	Card features message on back: Maybe we should talk.	Located in South Carolina / Business Cards	\$0.03	Customize Forms

Follow the instructions below. Enter NPN and click the update Preview Button.

- Division Office Phone will appear on the 1st line
- Cell Phone will appear on the 2nd line
- Home Phone will appear on the 3rd line
- Fax will appear on the 4th line

You have the option to turn off the phones that will appear.

Click the proof button to get a larger preview of your card. Then click Continue with Order.

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https://agents-physicians.rocsoft.com/fulfillment/from_shared_files

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Home | My Account | Help | Logout

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View Order History

CART [0]

Configure Template - [PMA3807-0414] Business Card

Template Instructions Preview

Start by typing your NPN number in the field below and click the Update Preview button and your information will appear.

Please click the proof button for a larger preview and review your order. Once you click Place Order on cart page, customer agrees to finished product.

Form Fields

Interactive From Contacts

NPN Number * Enter your NPN

Nickname This is optional. Please place quotes around your nickname.

Designations Only approved designations are: ACS, CEBS, CFP, ChFC, CLF, CLU, CRPC, FLMI, LUTCF, MBA, REBC, RHU

Office Phone? ☒ Yes ☐ No

Cell Phone? ☒ Yes ☐ No

Home Phone? ☒ Yes ☐ No

Fax Phone? ☒ Yes ☐ No

Photo? ☒ Yes ☐ No

If your photo does not appear, this means we do not have your photo on file in our catalog. Please send photo to advertising@physiciansmutual.com and we can add to catalog. At that time you can place an order.

* fields with an asterisk are required

Update Preview Page 1 / 2 Go Proof

Cancel Continue with Order

Once in the cart, select the quantity.

Select shipping method:

- UPS Ground is preferred.
- Two-day select can be used for new agents.

Select Charge Code:

- 2787 for New Agents
- 2793 for existing agents to deduct from their commission statement.

Click the Place Order button.

The screenshot shows the Physicians Mutual S3 website interface. The browser address bar displays https://agents-physicians.rocsoft.com/fulfillment/variabledata_order. The page header includes the Physicians Mutual logo and navigation links: Home, My Account, Help, and Logout. The main content area is titled "Cart" and shows a "Business Card Order" with a price of \$0.03 and a quantity of 105. The shipping information section shows a delivery estimate of Tuesday, September 06, 2016, and a selected shipping method of UPS Ground - Preferred Shipping Method. The billing information section shows a charge code of 2787 - New Agent Business Cards. Red arrows point to the quantity field, the shipping method dropdown, and the charge code dropdown.

Physicians Mutual S3 - Us X

← → ↻ https://agents-physicians.rocsoft.com/fulfillment/variabledata_order ☆ V ≡

Apps S3 ISS Webmail New folder Google Sales Presenter Upcoming Tourname Facebook Sign in to CareerBuild

Home | My Account | Help | Logout


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1/ Cart

Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Cart ID 843

Order name **Business Card Order** Order Estimate **\$3.15**

Item 1 Edit Dynamics Data Continue Shopping

 **Business Card**
PMA3807-0414
2 Pages

Price **\$0.03**
Quantity **105**

[Enter special instructions for this item.](#)

Shipping Information

I would like my order shipped by: **Monday, August 29, 2016** Note: Only dates when the print center is open may be selected.

Jim Smith
1458 Oak Street
Sacramento, California 94229

Select a Shipping Method:
UPS Ground - Preferred Shipping Method If the delivery estimate date is a Saturday or Sunday, the adjusted delivery date will be the following business day. Remember: There are no shipping charges!

Delivery Estimate:
Tuesday, September 06, 2016
[Enter shipping instructions for this recipient](#)

Billing Information

Select Payment Type

Charge Code **2787 - New Agent Business Cards** Total Split Percentage 0%

Add Split 2134 - DM Account 2790 - Free Supplies 2793 - Commission Statement 3643 - Misc account Codes for split billing.

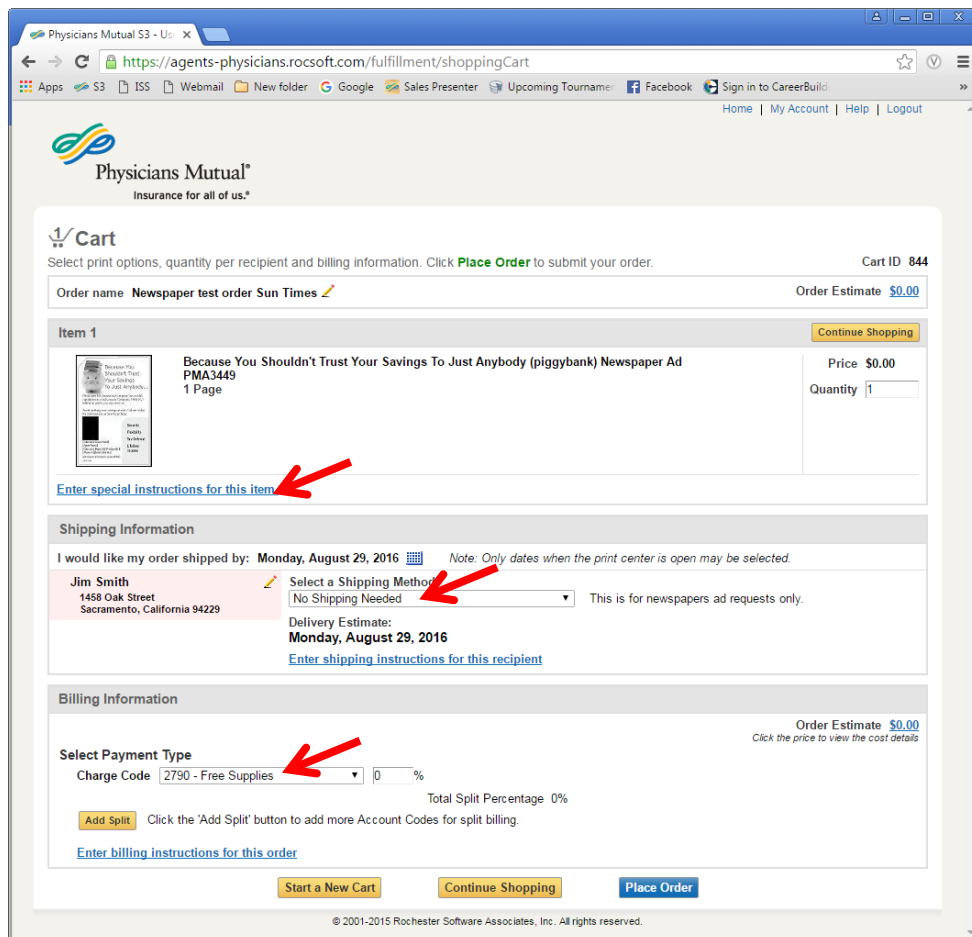
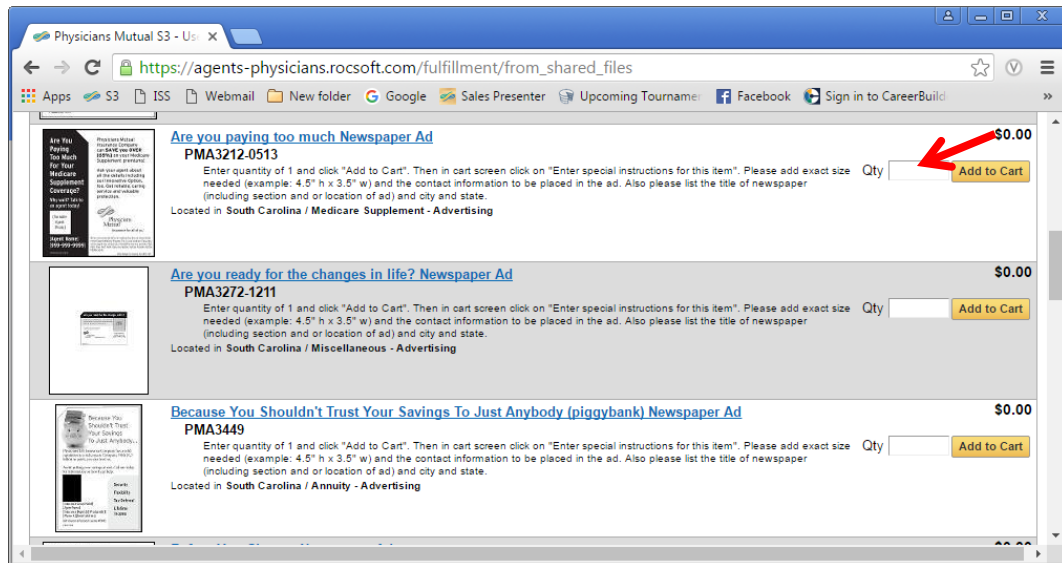
[Enter billing in](#)

Start a New Cart Continue Shopping Place Order

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Newspaper Ads

Enter quantity of 1 and click "Add to Cart". Then on cart screen click on "Enter special instructions for this item". Please add exact size needed (example: 4.5" h x 3.5" w) and the contact information to be placed in the ad. Also please list the title of newspaper (including section and or location of ad) and city and state.



Once the order is received, the newspaper ad is setup per the specs noted and emailed to the address listed under the account.

Forms with a Mailing List

Many of the forms listed in the catalog can be mailed to a list of names. This includes letters, postcards and greeting cards. Click the Customize Forms button.

Physicians Mutual S3 - Us: X

https://agents-physicians.rocsoft.com/fulfillment/from_shared_files

Apps S3 ISS Webmail New folder Google Sales Presenter Upcoming Tourname Facebook Sign in to CareerBuild

Home | My Account | Help | Logout

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View Order History

CART [0]

Home > Catalog > All Workgroups > All Folders

Select Items

Add items to your cart by entering quantities and clicking **Add to Cart**.
For template documents, click **Customize Forms** to set up the template and add it to your cart. All items with quantities are added to your cart first.

Item Search Search Clear

Search 3701 Rows Per Page 25
[Show Advanced Search Criteria](#) Sort By Item A-Z

	Medicare Seminar Postcard Invite - Dual Locations - Dual Dates - with Discounted First Class Postage PMA3701-0715 Postcard size is 6" x 4.25". Postcard is free. Postage will be \$.27 each. Customize Forms
	Medicare Seminar Postcard Invite - Single Location - Dual Dates - with Discounted First Class Postage PMA3701-0715 Postcard size is 6" x 4.25". Postcard is free. Postage will be \$.27 each. Customize Forms
	Medicare Seminar Postcard Invite - Single Location - Single Date - with Discounted First Class Postage PMA3701-0715 Postcard size is 6" x 4.25". Postcard is free. Postage will be \$.27 each. Customize Forms

Located in South Carolina / Seminars - Medicare

[1-3] of [3]

Add All to Cart

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Each form has instructions to follow regarding the mailing list preparations. Also there is a sample mailing list that can be downloaded. The list of names must be formatted as a CSV file before uploading.

Click the CSV tab. Do not use the interactive tab!

Follow the instructions on screen.

Physicians Mutual S3 - Us

https://agents-physicians.rocsoft.com/fulfillment/from_shared_files

Apps S3 ISS Webmail New folder Google Sales Presenter Upcoming Tournament Facebook Sign in to CareerBuild

Configure Template - [PMA3701-0715] Medicare Seminar Postcard Invite - Single Location - Single Date - with Discounted First Class Postage

Template Instructions **Preview**

Use the following [instructions](#) to setup your CSV file. This [sample mailing list](#) can be used to build your CSV mailing list.

DO NOT USE THE INTERACTIVE TAB BELOW!

Please click on the CSV tab and click "Choose File" or "Browse" buttons. Then click the "Upload File" button and your information will appear.

Please click the proof button for a larger preview and review your order. Check your artwork for the following:

- Typo errors in CSV file
- Phone, email, and photo

Once you click Add to Cart, customer agrees to finished product.

IMPORTANT: On the next screen you must change the quantity in your cart to match the number of records in your CSV file.

Form Fields

Interactive **CSV**

Source File: No file chosen

NPN Number *

Mailing List First Name *

Mailing List Last Name *

Mailing List Address *

Mailing List City *

Mailing List State *

Mailing List Zip Code *

Photo *

Seminar Date *

Seminar Time *

Seminar Location Name *

Seminar Location Address *

Seminar Location City *

State Zip

You're Invited To Understanding Medicare –
Parts A, B, C & D

Join us at this educational seminar to learn about the four parts of Medicare, including:

- Making the most of your rights, options and entitlements
- How to enroll in Medicare
- What Medicare does and doesn't cover
- And much more!

Please plan to attend. This is not a sales presentation. Call today - seating is limited!

at

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PMA3701-0715

Update Preview Page 1 / 2 Go Proof

Important: The quantity in your cart must match your number of records in the uploaded CSV file. The list below, for example, has 100 records.

Physicians Mutual S3 - U...
https://agents-physicians.rocsoft.com/fulfillment/variabledata_order

Source File: 288981mailing_list_csv [change](#)

NPN Number * 288981
Mailing List First Name * Faye
Mailing List Last Name * Cook
Mailing List Address * 408 Plume Ln
Mailing List City * Blythewood
Mailing List State * SC
Mailing List Zip Code * 29016
Photo *
Seminar Date * Thursday, February 4, 2016
Seminar Time * 10:00 a.m. or 3:00 p.m.
Seminar Location Name * Clermont County Public Library (Union Tow
Seminar Location * 4450 Glen Este Withamsville Road
Address
Seminar Location City * Clermont, SC 89657
State Zip
Comment * Refreshments will be served!
* fields with an asterisk are required

Row 1 / 100 [Go](#)

[Cancel](#) [Continue with Order](#)

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In cart, change quantity to 100. Select Mailing Discounted First Class from Print Facility. Select Commission Statement for payment. Click Place Order.

Physicians Mutual S3 - U...
https://agents-physicians.rocsoft.com/fulfillment/orderInvoice

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Cart
Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Cart ID 845

Order name Postcard mailing [Order Estimate \\$27.00](#)

Item 1 [Edit Dynamics Data](#) [Continue Shopping](#)

Medicare Seminar Postcard Invite - Single Location - Single Date - with Discounted First Class Postage
PMA3701-0715
26 Pages
Price \$0.00
Quantity 100

[Enter special instructions for this item.](#)

Shipping Information
I would like my order shipped by: **Monday, August 29, 2016** [Note: Only dates when the print center is open may be selected.](#)
Jim Smith
1458 Oak Street
Sacramento, California 94229
Select a Shipping Method:
Mailing Discounted First Class From Print Facility
Delivery Estimate:
Monday, September 05, 2016
[Enter shipping instructions for this recipient](#)

Billing Information
Select Payment Type
Charge Code 2793 - Commission Statement
Total Split Percentage 0%
[Add Split](#) Click the 'Add Split' button to add more Account Codes for split billing.
[Enter billing instructions for this order](#)

[Start a New Cart](#) [Continue Shopping](#) [Place Order](#)

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Forms with a Customer Mailing List

Forms can also be mailed to a customer list. Find the item you want to mail to your customer on S3. You do not need to add the item to your cart at this time instead, agent needs to send email to:

S3customerorder@physiciansmutual.com

Agent needs to specify:

- NPN number
- PMA number to mail
- type of customers
- whether to merge households
- First Class or Standard postage
- Agent Photo: Yes or No

Advertising Support Team will receive the mailing list from the Agency Business Analysis area. **The Advertising Support Team will start the order in S3 for the agent and notify the agent when the order is available for review.**

Agent can then log into S3 and view order history. An existing order will be saved and the agent will click modify to review the order and click Place Order in the cart screen.

The screenshot shows the 'My Orders' page in the Physicians Mutual S3 system. The page has a search bar at the top with fields for Order Search, Status (All), Order name, Item, Created from, to, Account Code, and Rows Per Page (25). Below the search bar is a table of orders. The table has columns for Order Name, Order #, Created, Sending to, and Status. A red arrow points to the 'Modify' button next to the order 'Proxy letter mailing test order'.

Order Name	Order #	Created	Sending to	Status	View	Reorder
Newspaper test order	825	08/15/2016	Donald Trump	Canceled	View	Reorder
Med Supp Brochures	824	08/15/2016	Donald Trump	Canceled	View	Reorder
Magnet test order #3	822	08/12/2016	Donald Trump	Production	View	Reorder
test	821	08/12/2016	Donald Trump	Canceled	View	Reorder
test	820	08/12/2016	Donald Trump	Canceled	View	Reorder
test	819	08/12/2016	Donald Trump	Canceled	View	Reorder
Birthday card test order	818	08/12/2016	Donald Trump	Completed	View	Reorder
test	817	08/12/2016	Donald Trump	Canceled	View	Reorder
test	816	08/12/2016	Donald Trump	Canceled	View	Reorder
PMA3703B test order 2	815	08/12/2016	Donald Trump	Completed	View	Reorder
Note Card custom test order	814	08/12/2016	Donald Trump	Completed	View	Reorder
PMA3286 test order 2	813	08/12/2016	Donald Trump	Completed	View	Reorder
Note card inventory test order	812	08/11/2016	Donald Trump	Completed	View	Reorder
Note card test order 2	811	08/11/2016	Donald Trump	Canceled	View	Reorder
Note card order	810	08/11/2016	Donald Trump	Canceled	View	Reorder
Checklist test order	809	08/11/2016	Donald Trump	Completed	View	Reorder
Magnet Test order #2	808	08/10/2016	Donald Trump	Completed	View	Reorder
Magnet Test order #2	807	08/10/2016	Donald Trump	Canceled	View	Reorder
Flyer test order	806	08/10/2016	Donald Trump	Completed	View	Reorder
Rate Change flyer test order	805	08/10/2016	Donald Trump	Completed	View	Reorder
Proxy letter mailing test order	804	08/10/2016	Donald Trump	Saved	Modify	Reorder
Assessment test orders	803	08/10/2016	Donald Trump	Completed	View	Reorder
Flyer test orders	802	08/10/2016	Donald Trump	Completed	View	Reorder
Discount items test order	801	08/09/2016	Donald Trump	Completed	View	Reorder
Buyer's worksheet test order	800	08/09/2016	Donald Trump	Completed	View	Reorder

View Order History

Use the View Order History link on the main page to view the status of your orders, view submitted orders, modify saved or rejected orders, reorder orders, and cancel orders. Once you click View Order History, the name of the page is **My Orders**.

