



FINANCIAL PROFESSIONAL USE ONLY – NOT FOR USE WITH CONSUMERS

SECURITY BENEFIT

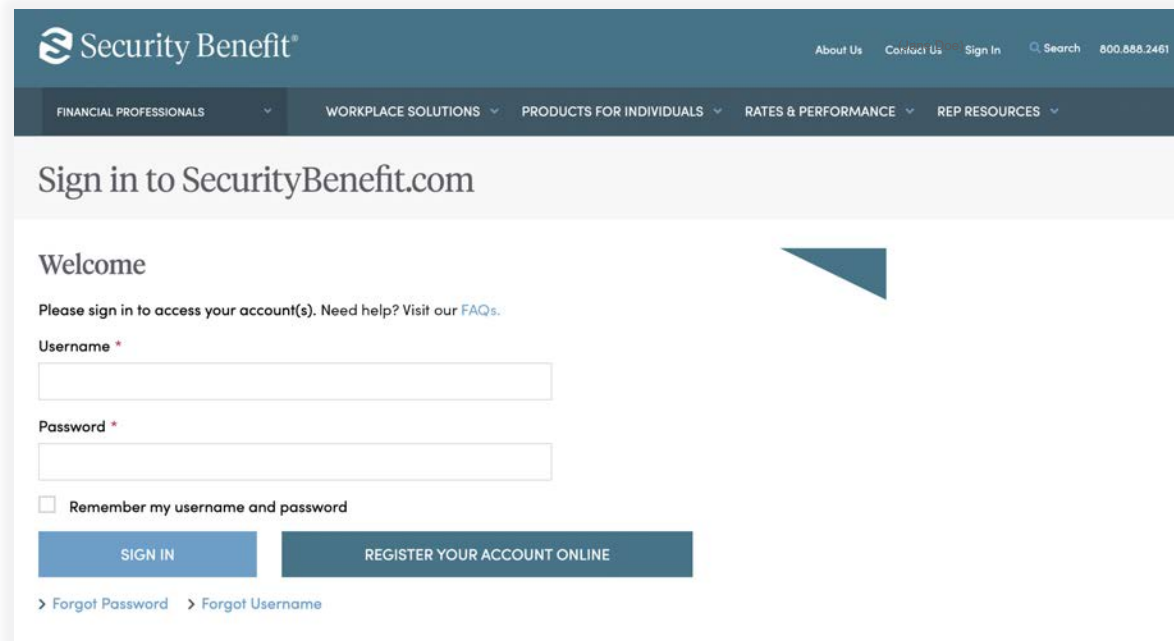
How to Order Sales Materials

2020

Ordering Sales Materials

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SIGNING INTO SECURITYBENEFIT.COM

A screenshot of the Security Benefit website's login page. The header features the Security Benefit logo on the left and navigation links (About Us, Contact Us, Sign In, Search, 800.888.2461) on the right. Below the header is a dark blue navigation bar with links for Financial Professionals, Workplace Solutions, Products for Individuals, Rates & Performance, and Rep Resources. The main content area has a light gray background with the heading "Sign in to SecurityBenefit.com". Below this is a "Welcome" section with a prompt to sign in and a link to FAQs. There are input fields for "Username" and "Password", both marked with an asterisk. A checkbox labeled "Remember my username and password" is below the password field. At the bottom of the form are two buttons: "SIGN IN" (blue) and "REGISTER YOUR ACCOUNT ONLINE" (dark blue). Below the buttons are links for "Forgot Password" and "Forgot Username".

Security Benefit®

About Us Contact Us Sign In Search 800.888.2461

FINANCIAL PROFESSIONALS WORKPLACE SOLUTIONS PRODUCTS FOR INDIVIDUALS RATES & PERFORMANCE REP RESOURCES

Sign in to SecurityBenefit.com

Welcome

Please sign in to access your account(s). Need help? Visit our [FAQs](#).

Username *

Password *

☐ Remember my username and password

[SIGN IN](#) [REGISTER YOUR ACCOUNT ONLINE](#)

[Forgot Password](#) [Forgot Username](#)

1. You will be required to sign in with your Security Benefit online account prior to ordering sales materials.
2. If you already have an account, go to SecurityBenefit.com/SignIn
3. If you don't have an account, go to SecurityBenefit.com/Register

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SIGNING INTO SECURITYBENEFIT.COM

The screenshot shows the Security Benefit website. At the top, there is a navigation bar with links: About Us, Contact Us, Sign In, Search, and 800.888.2461. Below this is a dark blue bar with menu items: FINANCIAL PROFESSIONALS, WORKPLACE SOLUTIONS, PRODUCTS FOR INDIVIDUALS, RATES & PERFORMANCE, and REP RESOURCES. The REP RESOURCES menu is highlighted with a red box. Below the navigation bar is a sign-in form with the heading "Sign in to SecurityBenefit.com". The form includes a "Welcome" message, a prompt to sign in, and fields for Username and Password. There is a "Remember my username and password" checkbox and "SIGN IN" and "REGISTER YOUR ACCOUNT ONLINE" buttons. Below the form are links for "Forgot Password" and "Forgot Username". To the right of the sign-in form, a red-bordered box shows the "REP RESOURCES" dropdown menu. The menu items are: Client Accounts, Sales Support, Forms & Materials, Tax Center, Group Trading, FAQs, Sales Applications, Sales Materials, Service Forms, State Replacement Forms, and Prospectuses. Red arrows point from the instructions on the right to the corresponding elements in the screenshot.

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About Us Contact Us Sign In Search 800.888.2461

FINANCIAL PROFESSIONALS WORKPLACE SOLUTIONS PRODUCTS FOR INDIVIDUALS RATES & PERFORMANCE REP RESOURCES

Sign in to SecurityBenefit.com

Welcome

Please sign in to access your account(s). Need help? Visit our [FAQs](#).

Username *

Password *

☐ Remember my username and password

[SIGN IN](#) [REGISTER YOUR ACCOUNT ONLINE](#)

[> Forgot Password](#) [> Forgot Username](#)

REP RESOURCES

- > Client Accounts
- > Sales Support
- > Forms & Materials
- > Tax Center
- > Group Trading
- > FAQs
- > Sales Applications
- > Sales Materials
- > Service Forms
- > State Replacement Forms
- > Prospectuses

4. Once signed in, hover over **Rep Resources**

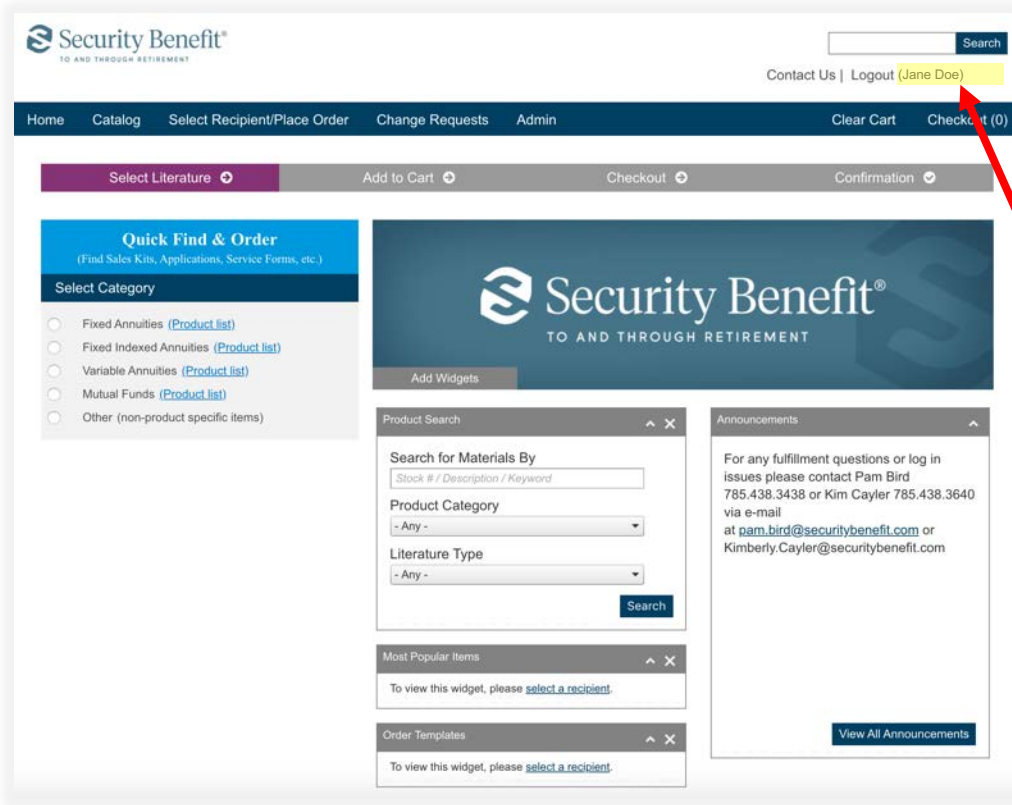
5. Hover over **Forms & Materials**

6. Select **Sales Materials**

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SALES MATERIALS HOMEPAGE

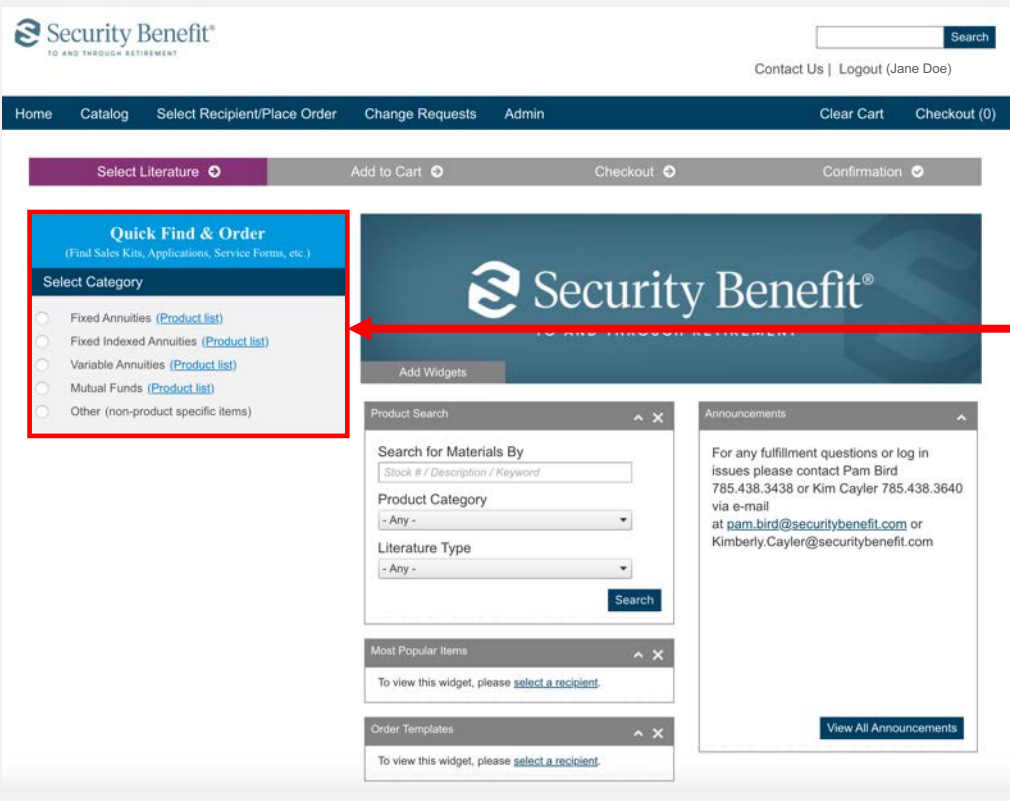


1. You will be directed to the sales material homepage.
2. You will notice your name listed in the upper right corner, above the header. This indicates that the system recognizes your credentials.
3. Anything you order at this point will prepopulate with your name and address.

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SEARCH BY PRODUCT CATEGORY



Click on the applicable category located under the **Quick Find & Order** section.

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SEARCH BY PRODUCT CATEGORY

Another menu, called **Select Product(s)**, will appear under the chosen category. Select the applicable products.

Click **Next**.

Select Literature Type(s) will appear under the chosen products. Select the applicable types.

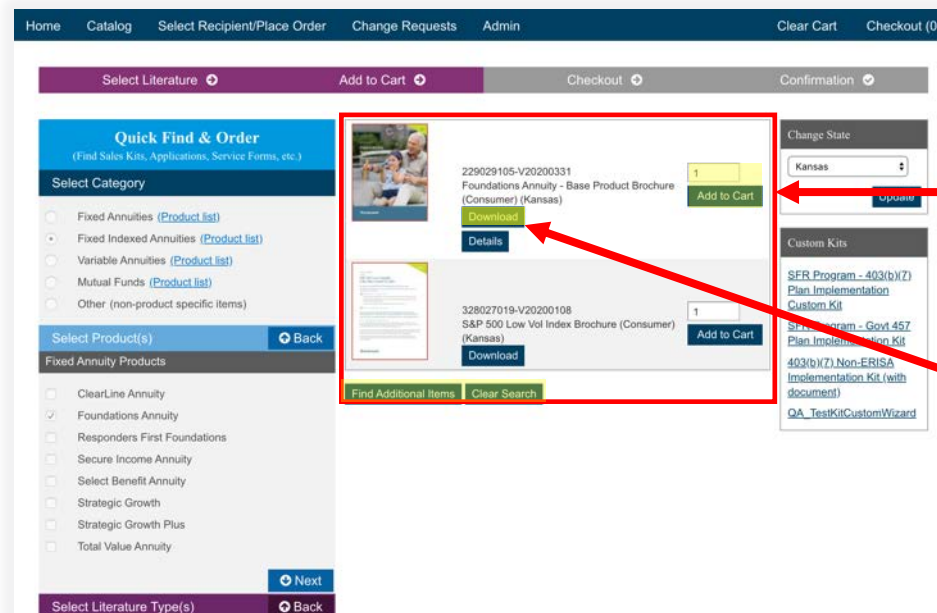
Select the applicable state.

Click **Find**.

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SEARCH BY PRODUCT CATEGORY



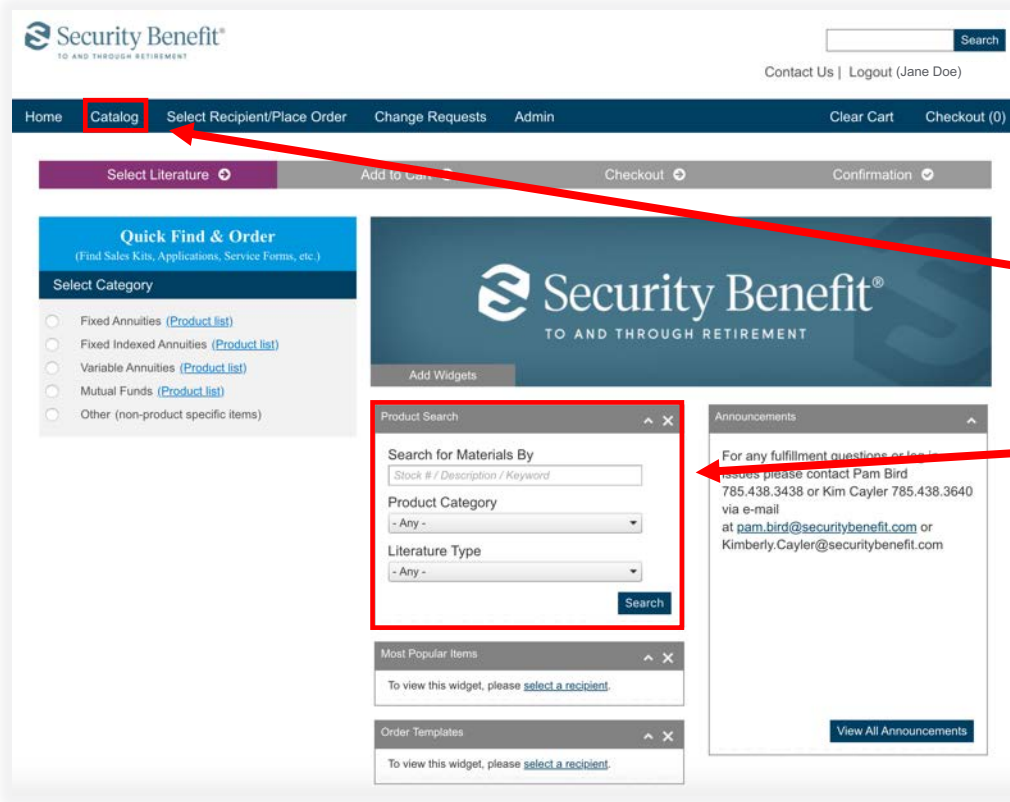
Your search results will appear in the middle of the screen. From here you can:

1. Enter the quantity of high-quality prints you would like to order and **Add to Cart**.
2. **Download** a PDF copy of applicable materials.
3. You may also choose to **Find Additional Items**.
4. You may also **Clear Search** and start a new one.

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SEARCH FOR ITEMS THROUGH KEYWORDS,
DESCRIPTION, OR STOCK NUMBER



Click **Catalog** in the main menu, or

Search directly in the **Product Search** area in the center of the home screen.

To search for items:

1. If you have a previous version of a piece and would like an updated version, you can search by the stock # found at the bottom back page of that piece.
2. Enter a description or keyword into the **Product Search** box.
3. Filter results by **Product Category** and/or by **Literature Type**.
4. Click the **Search** button to display items.

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SEARCH RESULTS PAGE

Once you've clicked search, you'll see the search results page. On the search page you can:

The screenshot shows the search results page. A red box highlights the search bar at the top, which contains the text 'Foundations'. Below the search bar are two filter dropdowns: 'Product Category' and 'Literature Type', both set to '- Any -'. Below the filters is a section titled 'Matching item(s) for: Keyword of 'Foundations'; Ordering State of 'KS''. This section contains a list of four items, each with a thumbnail, a title, a stock number, and buttons for 'Download' and 'Add to Cart'. The first item is 'Foundations Annuity Application - Generic (Kansas)' with stock number 159603000-V20200401. The second item is 'Foundations Annuity Application (Responders First) - Generic (Kansas)' with stock number 179603000-V20200401. The third item is 'Foundations Annuity - Fact Sheet w/ Comp (FPO) (Kansas)' with stock number 229029104-V20200331. The fourth item is 'Foundations Annuity - Base Product Brochure (Consumer) (Kansas)' with stock number 229029105-V20200331. Red arrows point from the numbered list on the right to the corresponding elements in the screenshot: arrow 1 points to the search bar, arrow 2 points to the filter dropdowns, arrow 3 points to the first item in the list, and arrow 4 points to the 'Add to Cart' button of the second item.

1. Enter a new search.
2. Use/edit filters to filter by category or literature type.
3. Scroll through the list of items retrieved in your original search results.
4. NOTE: When you see a **red** box around an item in the search results area, it means that it can be downloaded as a PDF, printed, or emailed to someone.
5. Once you have located the materials you wish to order, enter the quantity and click the **Add to Cart** button. Your shopping cart contents will be displayed in the box located on the lower left-hand side of the page.
6. NOTE: Under each **Add to Cart** button you clicked, the system will share that it was "Successfully Added" and the number requested.

Item detail will be displayed for each search result, including the online sample (if available), which can be viewed by clicking on the thumbnail.



- 1 229029105-V20200331
- 2 Foundations Annuity - Base Product Brochure (Consumer) (Kansas)

[Download](#)

[Details](#)

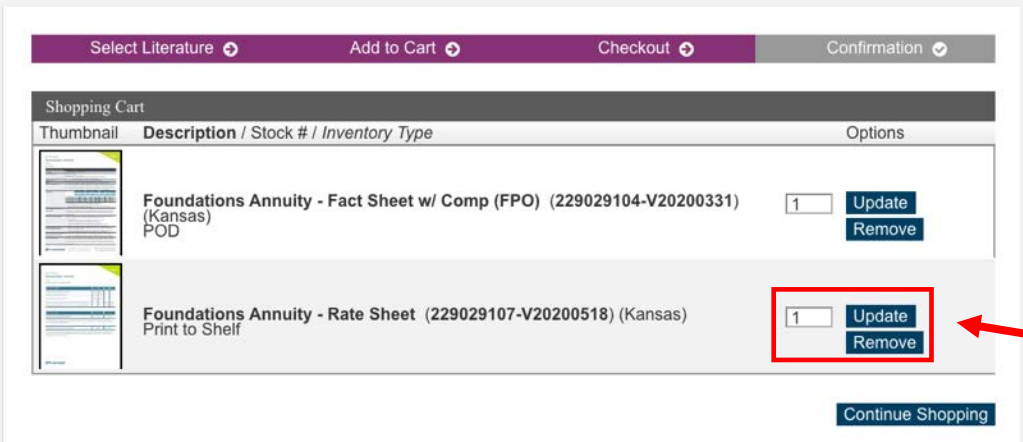
1. The stock # and the version date of the piece
2. The name of the piece

If your item is backordered, it will be noted in **red** below the name of the piece.

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CHECKOUT



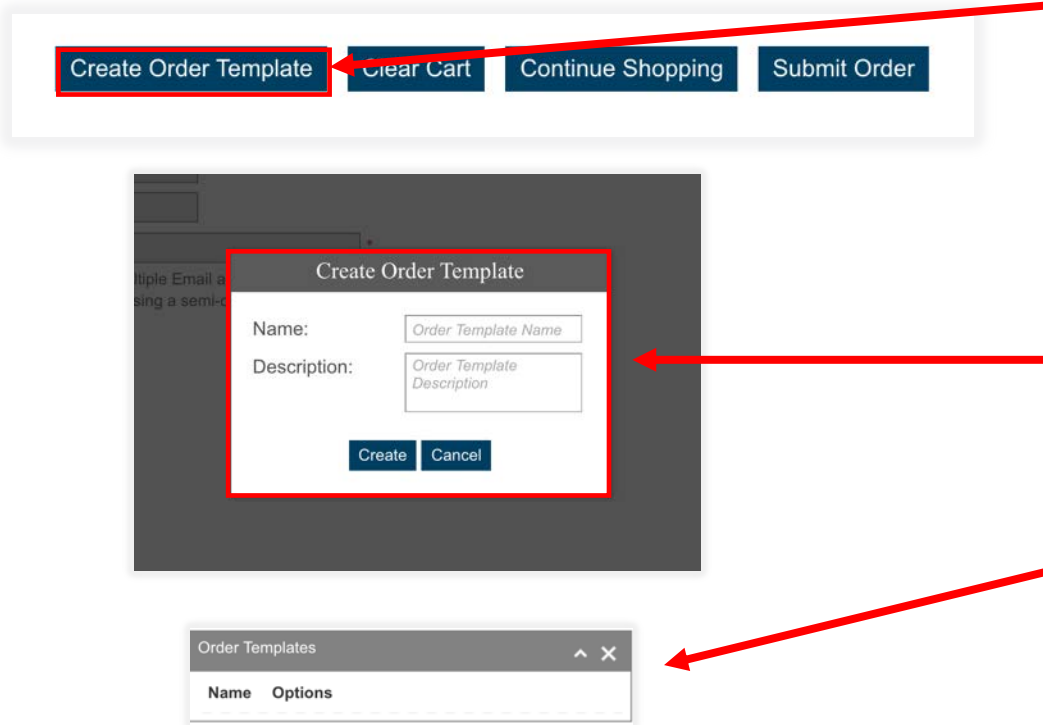
While in the **Shopping Cart**, you may review your materials and order details before checking out.

You can add additional quantities of an item by placing a new number in the quantity box and clicking **Update** or remove an item by clicking the **Remove** button.

Ordering Sales Materials

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CHECKOUT



Before checking out, you can **Create Order Template** (shown at the bottom of the **Shopping Cart** page), which will include the materials currently listed in your **Shopping Cart** so you can order them again for others easily, if you choose.

The **Create Order Template** pop-up window will appear and allow you to enter an **Order Template Name** and **Description**. Click the **Create** button to proceed.

The saved order template will now be accessible from the **Order Template** widget, which will be located on your homepage.

NOTE: The **Order Templates** you create will automatically delete if they remain unused after 30 days.

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CHECKOUT

Shipping Information

Name: Jane Doe

Company:

Address 1: 1 SW Security Benefit Pl

Address 2: 1 SW Security Benefit Pl

Address 3:

City: Topeka

Country: United States

State: Kansas

Zip: 66636-1000

Phone:

Email:

When including multiple Email addresses, separate the addresses by using a semi-colon (;).

Edit Address

Receive Emails for:

☒ Order Confirmation

☒ Shipped Confirmation

Standard Shipping

☒ UPS Ground

Estimated to arrive: Wednesday, May. 20th

Upgraded Shipping

☐ UPS 3 Day Select

Arrives: Thursday, May. 21st 11:00 PM

☐ UPS 2nd Day Air

Arrives: Wednesday, May. 20th 11:00 PM

☐ UPS 2nd Day Air A.M.

Arrives: Wednesday, May. 20th 11:00 PM

☐ UPS Next Day Air Saver

Arrives: Tuesday, May. 19th 11:00 PM

☐ UPS Next Day Air

Arrives: Tuesday, May. 19th 10:30 AM

Shipping/Comments:

Create Order Template

Clear Cart

Continue Shopping

Submit Order

Once you are ready to check out, please verify the shipping information and make any necessary edits.

You will receive **Order Confirmation** and/or **Shipping Confirmation** emails if you select to receive them.

Select your preferred shipping method.

Click the **Submit Order** button.

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CHECKOUT

Select Literature

Add to Cart

Checkout

Confirmation

Order Successfully Submitted

Ordering for: Jane Doe

Order Number: 6450395

Status: SUBMITTED

Order Date: 5/17/2020

Shipped To:

Jane Doe

1 SW Security Benefit Pl

1 SW Security Benefit Pl

Topeka, KS 66636-1000

Shipped By: UPS Ground

Order Details

Ticket Number: 6450395

Status: SUBMITTED

Ship By Date: 05/18/2020

Deliver By Date: 5/20/2020

Cancel Order

Stock #	Description	State	Quantity (Available/BackOrder)	Proof
229029104-V20200331	Foundations Annuity - Fact Sheet w/ Comp (FPO)	Kansas	1 (1/0)	
229029107-V20200518	Foundations Annuity - Rate Sheet	Kansas	1 (1/0)	

Copy

Home/New Order

Once you have checked out, you will be brought to the **Order Confirmation** page where you may view your order information and order status.

To submit a request to cancel your order, you may click on the **Cancel Order** button.

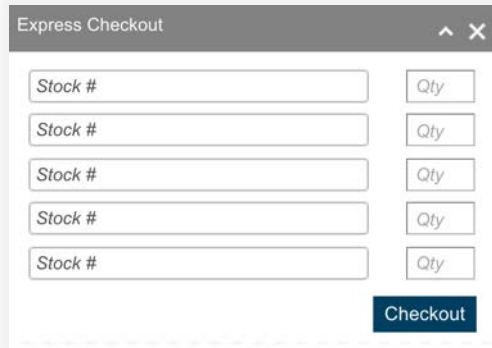
NOTE: if the **Cancel Order** button is not appearing, you can cancel your order by submitting a **Change Request** (see page 16) and following those steps.

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HOMEPAGE WIDGETS

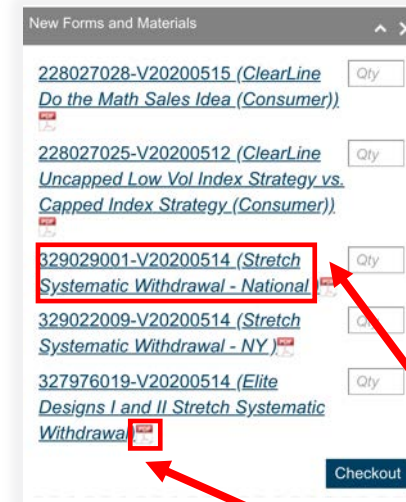
The widgets that appear on your Veritas home page can be removed and rearranged given your preference level.

A widget titled "Express Checkout" with a close button (X) in the top right corner. It contains five input fields, each labeled "Stock #" on the left and "Qty" on the right. At the bottom right of the widget is a blue button labeled "Checkout".

Express Checkout

This widget can be used if you know the stock # for the piece that is being ordered.

1. From the homepage, scroll down to find **Express Checkout**.
2. Type in the **Stock #**.
3. Once the items are entered, click on the **Checkout** button at the bottom of the box to go to your shopping cart.

A widget titled "New Forms and Materials" with a close button (X) in the top right corner. It displays a list of materials with their stock numbers and names. The third item, "329029001-V20200514 (Stretch Systematic Withdrawal - National)", is highlighted with a red box. To the right of each item is a "Qty" input field. At the bottom right is a blue button labeled "Checkout". A red arrow points from the highlighted item to the "Checkout" button.

New Forms and Materials

This widget displays the five newest materials available for ordering.

1. Add the quantity into the box next to the items you would like to order.
2. Click on the **Checkout** button at the bottom of the box to go directly to your shopping cart.

To view more details for an item, click on the item name and stock # to go to the **Material Search** page.

To view an item, click on the PDF icon, when available.

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HOMEPAGE WIDGETS

My Recent Orders				
Order #	Status	Options		
6450395	Pending Cancellation	View Copy		
5956940	CLOSED	View Copy		
5809361	CLOSED	View Copy		
5775640	CLOSED	View Copy		
5775584	CLOSED	View Copy		

My Recent Orders

This widget allows you to view the status of recent and past orders.

Viewing the order will take you to a summary of the order – its status and date of the order.

Copying the order will place items into your shopping cart, where you can quickly proceed to checkout.

Order Lookup			
Search by Date			
Date From		Date To	
Search			
Search by Order Number			
Order Number		Copy	View

Order Lookup

You can manually look up an order by accessing this widget and searching by the date range or order number.

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HOMEPAGE WIDGETS

Most Popular Items

Kleber Alves Bio Flyer (3801900340-V20191030)

Qty

Foundations Annuity - Client Kit (380190024-V20140901)

Qty

Advisors Excel EMO Agent Kit -TVA/SG/SG+
(Advisors Excel EMO Agent Kit-V20170104)

Qty

RateTrack Annuity - Client Kit (380150095-V20160301)

Qty

Quick Reference Tax Guide 2020
(228014039-V20200102)

Qty

Checkout

Most Popular Items

You can view the most ordered items by all system users within this widget. You can click on the title of the piece to view more details. Or you can enter the quantity you wish to order and select **Checkout**.

Announcements

For any fulfillment questions or log in issues please contact Pam Bird 785.438.3438 or Kim Cayler 785.438.3640 via e-mail at pam.bird@securitybenefit.com or Kimberly.Cayler@securitybenefit.com

[View All Announcements](#)

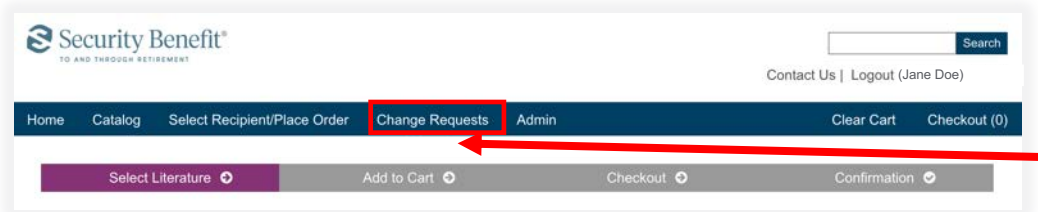
Announcements

Quickly view recent system announcements here.

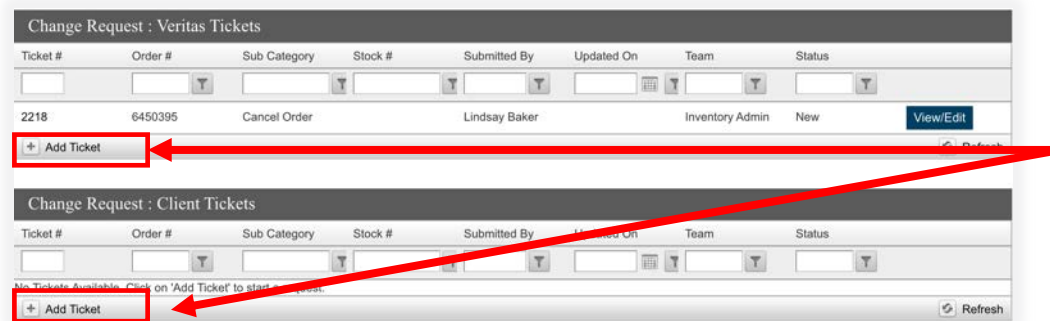
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CHANGE REQUEST TICKETS



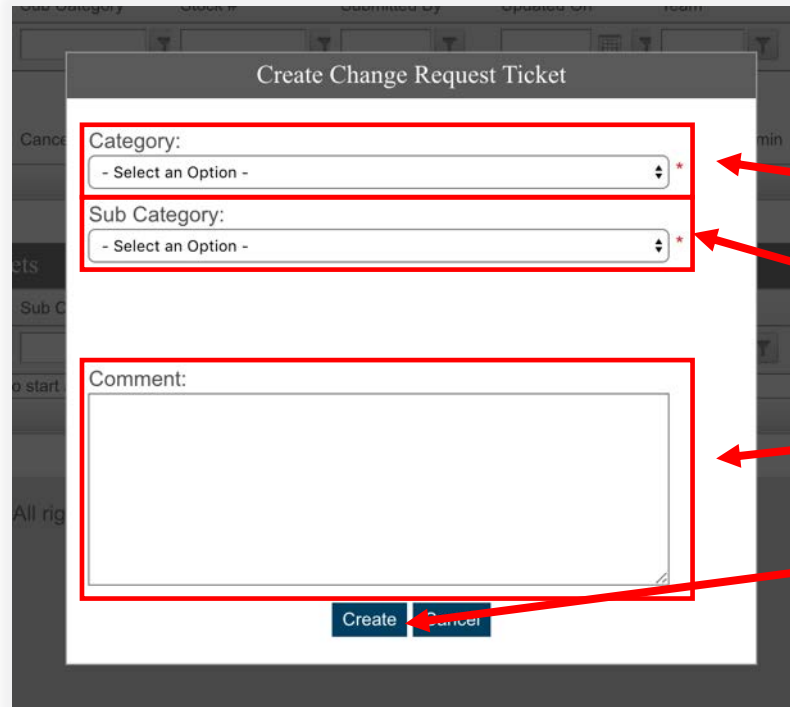
1. Click on the **Change Requests** menu option on the navigation bar.
2. The main change request ticket page is divided between Veritas and Client change request tickets. You may add your change request to either section.
3. To create a new change request ticket, select **Add Ticket**.



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CHANGE REQUEST TICKETS



The screenshot shows a 'Create Change Request Ticket' form. It has three main input areas: a 'Category' dropdown menu, a 'Sub Category' dropdown menu, and a 'Comment' text area. Each of these three areas is enclosed in a red rectangular box. Red arrows point from the numbered list on the right to each of these boxes. At the bottom of the form, there are two buttons: 'Create' and 'Cancel'. A red arrow points from step 8 of the list to the 'Create' button.

4. A pop-up window will appear.
5. Select the **Category** of your change request.
6. Select the **Sub Category**.
7. Add **Comments**, as needed.
8. Select **Create**.

You will be notified via an automated email when a comment has been added to your ticket or when the status of your ticket has been updated.



Questions?

Call us for more information at 800.747.5164, option 3,
or visit SecurityBenefit.com.