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The screenshot shows the Agency Marketing Blueprint homepage. At the top, the logo and navigation bar are visible. A red arrow labeled '1' points to the 'Home' button in the top navigation bar. Below the navigation bar, there's a 'Marketing Programs Directory' dropdown and an 'item search' bar. The main content area features a large banner for 'Agency Branded Tile Tracker' with an image of a tile and text describing its availability and use. Below the banner are four colored boxes: 'Attract customers in new ways' (orange), 'Build personalized solutions' (pink), 'Cultivate a trust-based relationship' (green), and 'Regional information' (blue). A red arrow labeled '2' points to the 'Quick Links' section on the left, which lists various user actions like 'Update My Profile' and 'View My Order History'. A red arrow labeled '3' points to the 'Blueprint Resource Center' section, which offers resources for growing a business. A red arrow labeled '4' points to the 'Contact Us' section, which provides contact information for the Blueprint team. A red arrow labeled '5' points to the 'Agency Corner' section, which features quotes from agency owners. A red arrow labeled '6' points to the 'Regional Information' box, which links to regional marketing details.

1) **Home** – If at any point during enrollment you wish to return to the Homepage, simply click on either the 'Home' button or the Blueprint logo

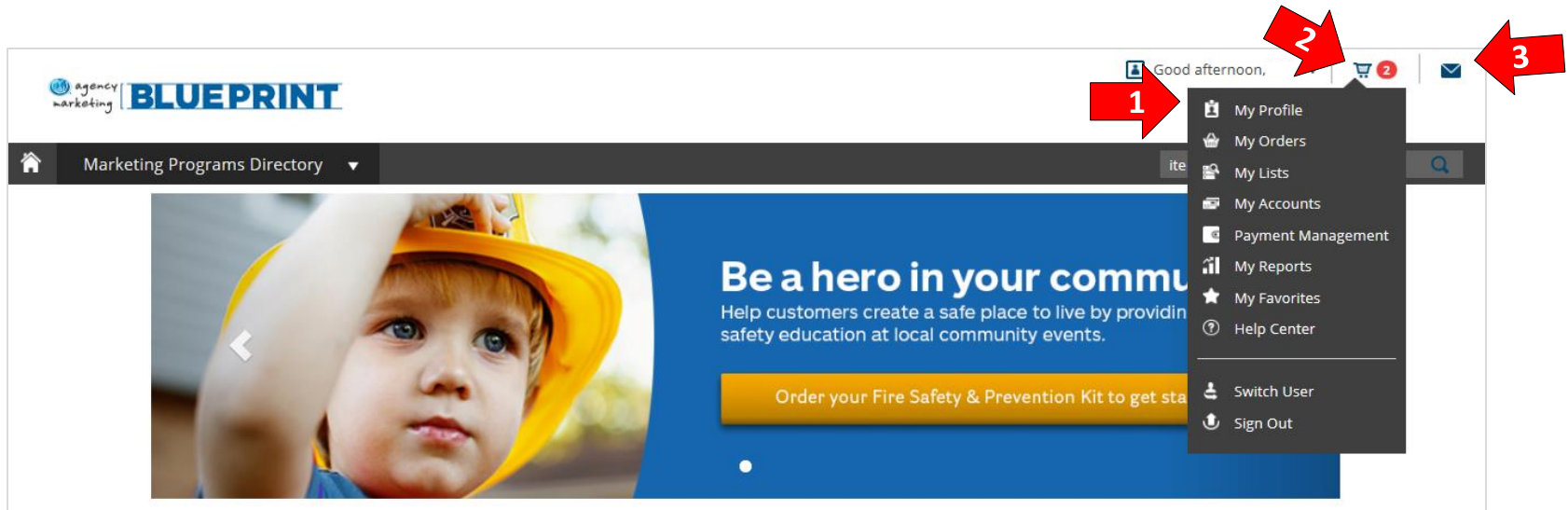
2) **Quick Links** – Easily access the site's most utilized features

3) Questions about program details? Check out the **Blueprint Resource Center** for more information

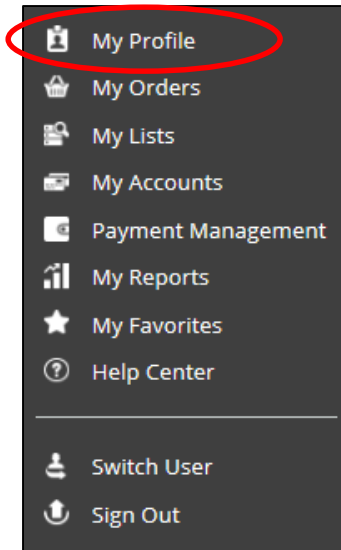
4) **Contact Us** – Allows you to easily reach out to Blueprint Support

5) **Agency Corner** – Hear how other agency owners have benefited from Blueprint

6) **Regional Information** – Learn more about your region and your marketing team here.



- 1) The [Navigation Bar](#) allows you to quickly access the following:
 - “My Profile” for updating contact information (**Important to Complete**)
 - “My Orders” to view past Blueprint orders
 - “My Lists” to view who direct mail campaigns were sent to with contact information
 - “Payment Management” to set your Direct Mail billing preferences
 - “My Accounts” to view credit cards on file
 - “My Favorites” to view programs you have starred as a favorite
 - “Help Center” for any Blueprint related questions
- 2) Your [Shopping Cart](#) is located at the top right of the screen and will highlight how many items you have selected to purchase
- 3) Your [Mailbox](#) will notify you when you have incoming messages



1

Contact Information

Marketing Address

Agent Number

Customer Friendly Last Name

Customer Friendly First Name

Title

Contact Email Address

Office Phone

Prospect Mail Phone

Blueprint Activation Contact Phone

Office Fax

Editable for 2017

1

Contact Information

Marketing Address

Customer Friendly Agency Name

Time Zone *

Agency Name Pronunciation

Include Photo in Direct Mail/Email Campaigns

Include My Scanned Personal Signature on Direct Mail Campaigns

EFS Signature (Name and Designation)

EFS Agent Number (0A1234)

New for 2017

2

Contact Information

Marketing Address

Address Line 1: 2775 N. Sanders Rd.

Address Line 2:

City: Northbrook

State: IL

Zip:

- 1) **Contact Information** allows you to update/edit the following:
 - Customer Friendly First and Last Name – *New for 2017*
 - Prospect Mail Phone
 - Blueprint Activation Contact Phone
 - Time Zone
 - Include Photo and Scanned Personal Signature in Direct Mail/Email Campaigns - *New for 2017*
 - Your photo from BrandMuscle (if available) and your scanned personal signature from TaG (if available) will be included in direct mail/email campaigns. *Your photo will not be pulled from your Allstate website.* To opt out of these, uncheck each box.
 - EFS Signature (Name and Designation) & EFS Agent Number
 - If you have an EFS partner, include his/her information here. This will allow him/her to be included on applicable programs.
- 2) **Marketing Address:** please confirm your address is listed correctly. This information is pre-populated from the address on your website.

Good afternoon

Marketing Programs Directory

Orders

From Date: 10/19/2015 To Date: 12/31/2016

Order Id: Order Name:

Clear Search

Currently displaying all 13 records

| ORDER # | DATE | ORDER INFO | ACTIONS |
|---------|---|--|---|
| 188948 | Order Date: 06/20/2016 Creation Date: 06/20/2016 | Name: Q3/Q4 Home + Life & Auto Prospecting Owner: Anita Avila | Channel: Direct Mail Status: In process Details |
| 126315 | Order Date: 11/17/2015 Creation Date: 11/17/2015 | Name: Life Cross-Sell DM Owner: Anita Avila | Channel: Direct Mail Status: In process Details |
| 126314 | Order Date: 11/17/2015 Creation Date: 11/17/2015 | Name: Auto/Home Prospecting DM Owner: Anita Avila | Channel: Direct Mail Status: In process Details |

Channel: Marketing & Sales

- 1) **My Orders** – Use My Orders to view what you have purchased and its status, including programs and DM/Email campaigns
- 2) **Details** – View more information on the program(s) and DM/Email campaigns you chose

Good afternoon, | 1

Marketing Programs Directory

Lists

From Date: 03/14/2016 To Date: 09/30/2016 List Type: Show All...

Currently displaying all 1 records

| STATUS | LIST NAME | LIST TYPE | # OF MEMBERS | DATE C | ACTION |
|-----------|--|-----------|--------------|------------|---------|
| AVAILABLE | Home Team Marketing Fall Season Postcard | Prospect | 1430 | 09/13/2016 | Details |

Currently displaying all 2 records

| STATUS | LIST NAME | LIST TYPE | # OF MEMBERS | DATE CREATED | ACTION |
|-------------------------|---|-----------|--------------|--------------|---------------|
| AVAILABLE | Q3/Q4 Home + Life & Auto Prospecting-20160906 | Prospect | 688 | 09/13/2016 | Close |
| File not yet downloaded | | | | | |
| | | | | View Details | Download list |
| DOWNLOADED | Q3/Q4 Home + Life & Auto Prospecting-20160809 | Prospect | 723 | 08/15/2016 | View Details |

List Details

In order to view phone numbers associated with these records, please download the list using the Download button.

Q3/Q4 Home + Life & Auto Prospecting-20160906

Currently displaying 1 to 25 of 688 records

| FIRST NAME | LAST NAME | STREET ADDRESS | CITY | STATE | ZIP CODE | VIEW | DELETE |
|------------|-----------|----------------------|-------------|-------|----------|------|--------|
| LENA | SEDILLO | 8826 ODIN RD SW | ALBUQUERQUE | NM | 87121 | | |
| REINIER | RAMIREZ | 1000 PALISADES DR NW | ALBUQUERQUE | NM | 87105 | | |

- 1) **My Lists** – Use My Lists to view who your Direct Mail campaigns were sent to
- 2) **List Type** – Use the drop down to view prospecting campaigns, cross-sell campaigns or both
- 3) **View Details** – Use the View Details button to either preview the list or download the list to an excel document
- 4) When using view details to preview a list in your browser, click the eye for more customer/prospect information. Click download to download into an Excel document.

1) My Accounts – Use My Accounts to view your credits and credit cards on file.

2) Credits – Your Fast Start Credit and Blueprint Credit will display first

3) Executive Advantage Cards – Your Executive Advantage Plus Card will be in the system and your balance will display. These balances are updated weekly

4) View payment history with the Payment & Invoice History tab

5) Stored Credit Cards – Agents will also be able to see stored credit cards in this section

Accounts

Click here to access the [Payment Management](#) screen.

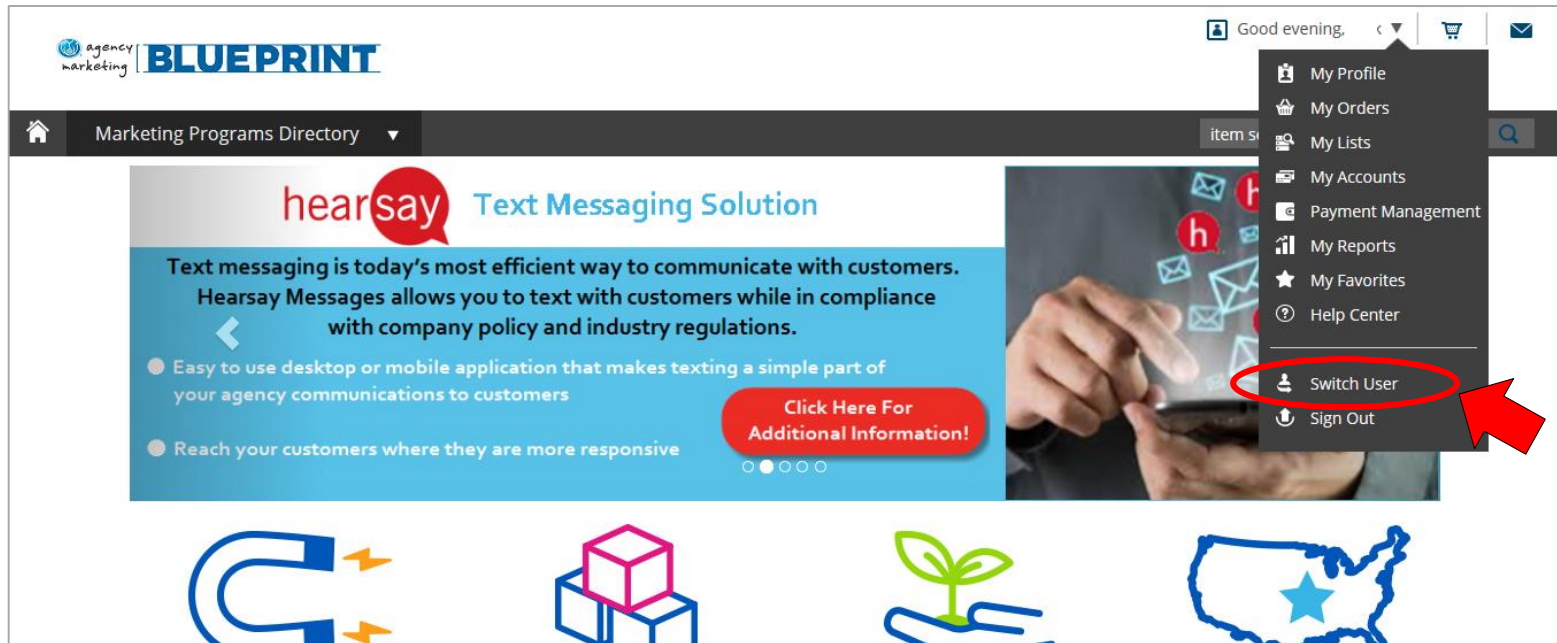
Accounts & Balances | [Payment & Invoice History](#) | [Stored Credit Cards](#)

| ACCOUNT NAME | ACCOUNT TYPE | CURRENT BALANCE | AS OF DATE | ACTION |
|--|-----------------------|-----------------|----------------|----------------------|
| 2016 Fast Start Credit | Shared Funded Account | \$0.00 | Not Applicable | View |
| Blueprint Credit | Funded Account | \$0.00 | Not Applicable | View |
| Commission Deduct Account | Corporate Billing | Not Applicable | Not Applicable | View |
| Executive Advantage Card ending in 6160 | Credit Card | Not Applicable | Not Applicable | View |
| Executive Advantage Plus Card ending in 8335 | Credit Card | \$2,837.01 | 06/24/2016 | View |
| General Credit Card Account | Credit Card | Not Applicable | Not Applicable | View |

[Accounts & Balances](#) | [Payment & Invoice History](#) | [Stored Credit Cards](#)

[Add a credit card](#)

| CARD | EXPIRATION | ADDED | STATUS | ACTION |
|--|------------|------------|--------|--|
| American Express ending in 1234 | 11/2020 | 01/14/2016 | ACTIVE | View Edit Delete |
| Executive Advantage Plus Card ending in 5678 | 02/2018 | 04/21/2015 | ACTIVE | View Edit Delete |
| Executive Advantage Card ending in 9012 | 01/2017 | 04/21/2015 | ACTIVE | View Edit Delete |



Set [Switch User](#) functionality allows you to give your office staff the ability to impersonate you and place orders on your behalf.

In order to grant this permission, select [Switch User](#) in the Navigation Bar.

Switch User
×

Switch User

Set Switch User

To search for a user, use the fields below

Last Name

First Name

NTID

Search

Show All

To switch to a different user, select from the list below.

Showing 1 to 7 of 45979 results

⏪
1
2
3
4
5
...
6569
⏩

| LAST NAME | FIRST NAME | NTID | ACTION |
|-----------|------------|------|-------------|
| | | | Switch User |
| | | | Switch User |
| | | | Switch User |

Select the 'Set Switch User' tab

Switch User

Switch User

Set Switch User

Find Users Matching:

1

Last Name

Muncy

First Name

Erica

NTID

2

Search

Show All

Search Results

Showing 1 to 1 of 1 results

| LAST NAME | FIRST NAME | NTID | ACTION |
|-----------|------------|-------|-----------------------------|
| Muncy | Erica | emunc | <div>3</div> <div>Add</div> |

- 1) Enter the name or NTID of the staff person you would like to provide access to
- 2) Click 'Search'
- 3) The staff name will appear in the search results section. Next, click 'Add' to grant permission.

Switch User

Switch User

Set Switch User

Find Users Matching:

Last Name

Muncy

First Name

Erica

NTID

Search

Show All

Search Results

Showing 1 to 1 of 1 results

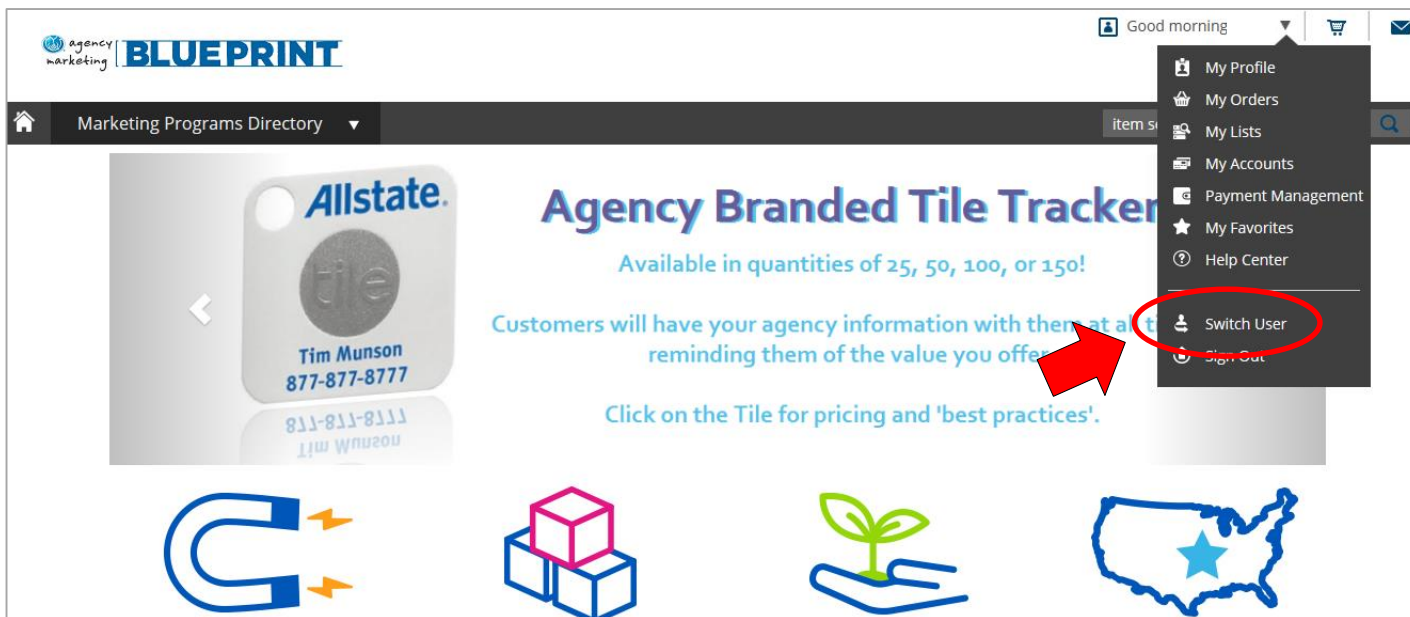
| LAST NAME | FIRST NAME | NTID | ACTION |
|-----------|------------|-------|------------------------|
| Muncy | Erica | emunc | Delete |

Users who can switch to you

Showing 1 to 1 of 1 results

| LAST NAME | FIRST NAME | NTID | ACTION |
|-----------|------------|-------|------------------------|
| Muncy | Erica | emunc | Delete |

The staff person will now show as a user who can impersonate ([switch to](#)) you.



Once you have provided access to your staff, they now have the ability to impersonate you and place orders on your behalf.

In order for them to do this, they will log into the Blueprint site and select 'Switch User' in the Navigation Bar.

Switch User

Switch User

Set Switch User

To search for a user, use the fields below

Last Name

Cross

First Name

Kyler

NTID

Search

Show All

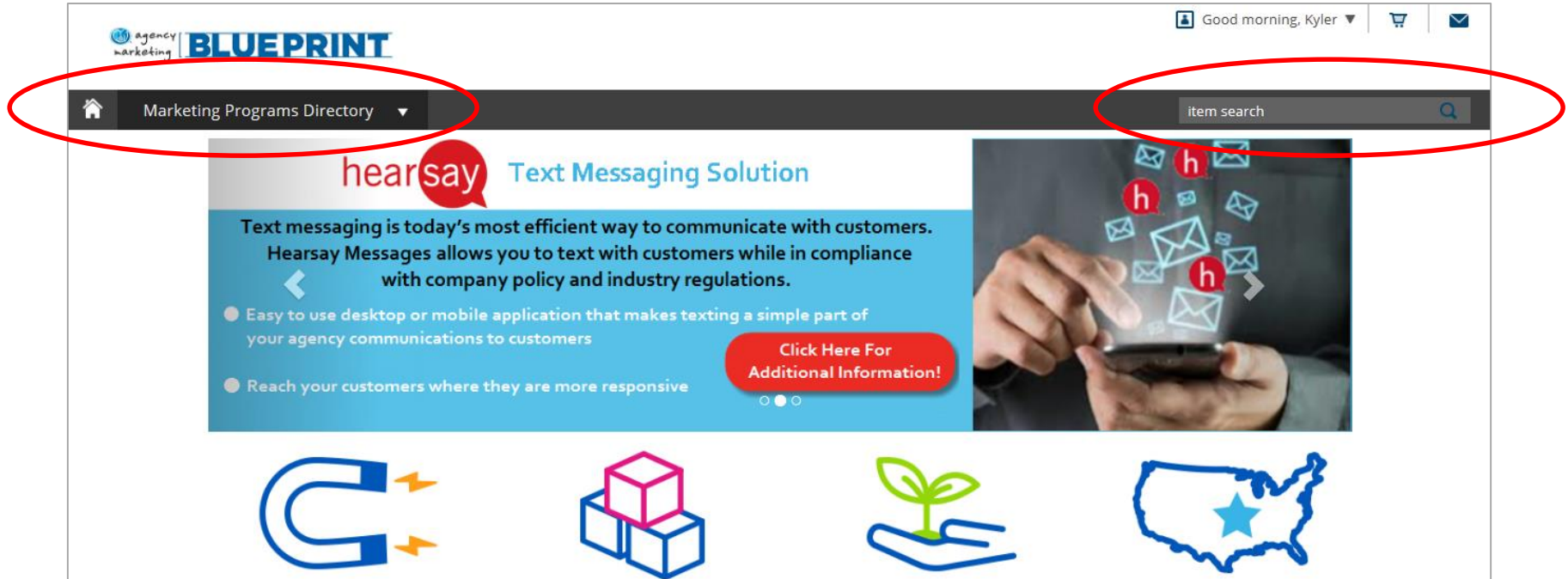
To switch to a different user, select from the list below.

Showing 0 to 0 of 0 results

| LAST NAME | FIRST NAME | NTID | ACTION |
|-----------|------------|-------|-------------|
| Cross | Kyler | kcros | Switch User |

On the ‘[Switch User](#)’ tab, the name of users your staff person can impersonate (switch to) will be listed. If you have granted them permission using the steps on the previous pages, your name should appear here.

Your staff person will then click ‘[Switch User](#)’ in the Action column. They will now have the ability to impersonate and place orders on your behalf.



Once you have decided on the tactics you would like to purchase, you can begin the process of placing an order.

Programs can be found by searching for their names or keywords in the [Item Search](#) bar, or you can access them through the [Marketing Programs Directory](#) drop down menu in the upper left corner.

The screenshot shows the Agency Marketing Blueprint interface. At the top, there's a header with the logo and a user greeting 'Good morning, Kyler'. Below the header is a navigation bar with 'Marketing Programs Directory' and a search bar. The main content area is titled 'Search Results' and shows 'Showing 1 to 38 of 38 results for 'Find Cross-sell Programs''. On the left, there's a 'NARROW YOUR RESULTS' sidebar with filters for Audience (Customer), Channel (Marketing & Sales, Direct Mail, Email, Leads & Audits), and Program. On the right, there's a list of programs. Three red arrows are overlaid: Arrow 1 points to the 'Marketing Programs Directory' dropdown; Arrow 2 points to the 'Narrow Your Results' sidebar; Arrow 3 points to the 'Life Cross-Sell DM 2017' program listing.

| NARROW YOUR RESULTS | | Sort By: Inventory Code |
|--|--|---|
| Audience | | |
| <input type="checkbox"/> Customer (38) | | |
| Channel | | |
| <input type="checkbox"/> Marketing & Sales (6) | | |
| <input type="checkbox"/> Direct Mail (14) | | |
| <input type="checkbox"/> Email (9) | | |
| <input type="checkbox"/> Leads & Audits (9) | | |
| Program | | |
| | Life Cross-Sell DM 2017 Available For: Direct Mail Inventory Code: 0210LIFECSDM ★ Favorite Campaign | \$0.17 per piece > |
| | Drivewise Good Driver Rewards Postcard Available For: Direct Mail Inventory Code: 1100_DW10_GOODDRIVERREW_BPC_D11977TAG ★ Favorite | Pricing: \$0.39 per recipient mailed > |
| | Bundle & Save Boat Cross-sell Email Available For: Email Inventory | > |

- 1) **Marketing Programs Directory** – Clicking a Business Objective from the Marketing Programs Directory will display relevant programs, direct mail campaigns, and email campaigns.
- 2) **Narrow Your Results** – Use the filters to narrow down results by target, availability and/or program type
TIP: You can use multiple filters at once!
- 3) **Choose a Tactic** – To see more details about the offering or see which vendors are available, you can select the tactic by clicking on it.

Item Details

[Back To Search Results](#)

Available in House & Home states only

Auto/Home Prospecting DM 2017

This direct mail campaign targets prospects with a higher likelihood to request a quote and result in a sale of one or more Allstate policies. The criteria includes over 2,000 demographic variables, such as age, address type, marital status, occupation type, home value, etc. Criteria is continually updated based on the performance of recently completed campaigns.

Each month the mail file will be rank ordered based on the likelihood of each prospect to respond to direct mail. The top prospects, depending on enrollment preferences, in the file will be selected to receive a prospecting mailing. The creative that is used (Auto or Home) will depend on the prospects in the file and the best creative for them. It is possible that on a monthly basis you could have all Auto mailed and no Home (or vice versa) or a combination of both Auto and Home.

NOTE: Volume and total price for this campaign represent your **annual commitment**. Selected volume is not a guarantee and is based on lead availability. The mailings will drop monthly, through November.

Available For: Direct Mail

[Favorite Campaign](#)

Pricing Information

\$0.22 per piece on the first 250 pieces a month; \$0.44 per piece on any volume over 250

Additional Details

Inventory Code: 0100AUTOHOMECPDM

1

2

3

4

Available in House & Home states only

Auto/Home Prospecting DM 2017

This direct mail campaign targets prospects with a higher likelihood to request a quote and result in a sale of one or more Allstate policies. The criteria includes over 2,000 demographic variables, such as age, address type, marital status, occupation type, home value, etc. Criteria is continually updated based on the performance of recently completed campaigns.

Each month the mail file will be rank ordered based on the likelihood of each prospect to respond to direct mail. The top prospects, depending on enrollment preferences, in the file will be selected to receive a prospecting mailing. The creative that is used (Auto or Home) will depend on the prospects in the file and the best creative for them. It is possible that on a monthly basis you could have all Auto mailed and no Home (or vice versa) or a combination of both Auto and Home.

NOTE: Volume and total price for this campaign represent your **annual commitment**. Selected volume is not a guarantee and is based on lead availability. The mailings will drop monthly, through November.

Available For: Direct Mail

[Favorite Campaign](#)

Pricing Information

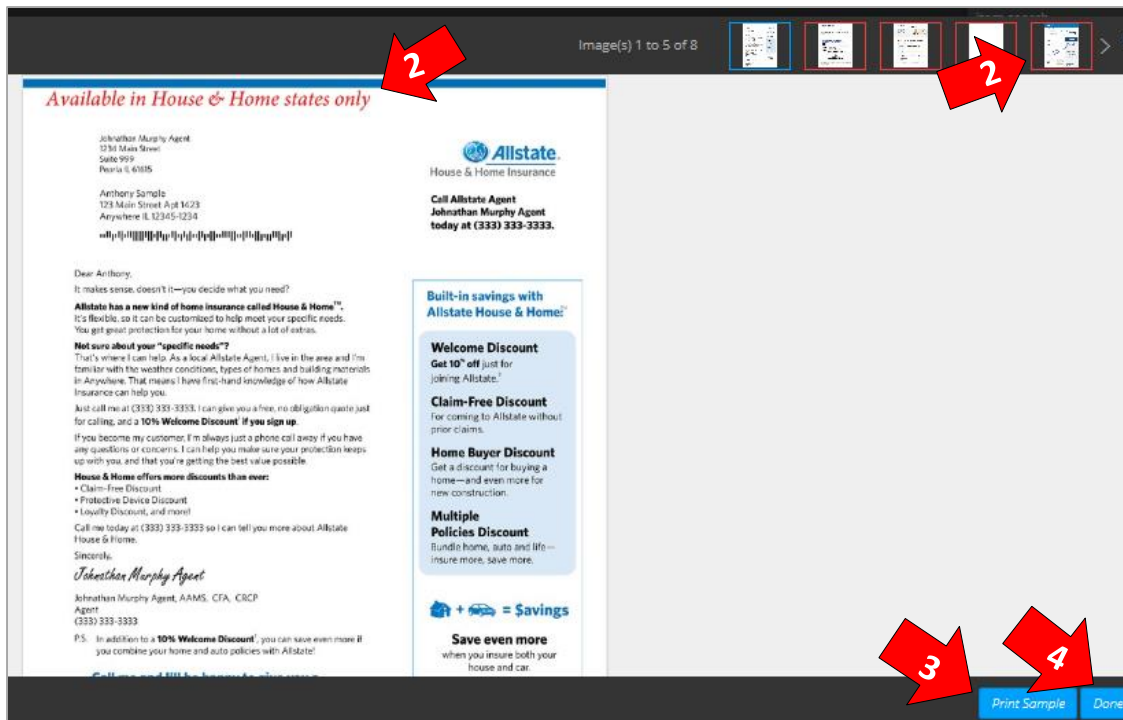
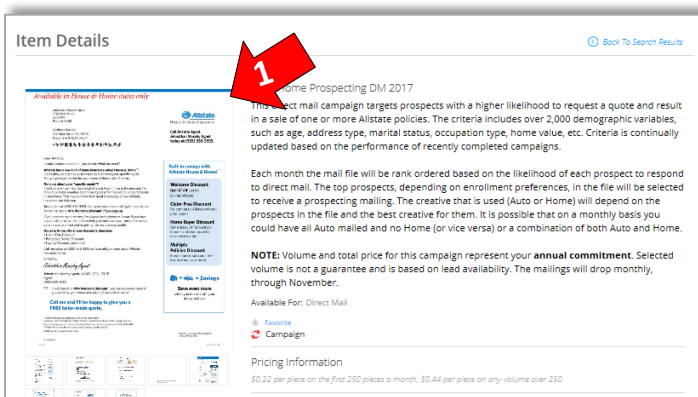
\$0.22 per piece on the first 250 pieces a month; \$0.44 per piece on any volume over 250

Additional Details

Inventory Code: 0100AUTOHOMECPDM

- 1) **Select a Direct Mail Campaign** – Click the Direct Mail campaign you are interested in from the results page (shown on prior page)
- 2) **Direct Mail Details** – Read the description of the direct mail campaign for more details
- 3) **Pricing Information** – This will explain the price per piece
- 4) **Creatives** – Click the picture of the creative to see a larger view, print samples and view regional variations (*more details on following page*)

- 1) **Click the Creative** – Click the creative from the tactic screen to preview the creative image
- 2) **Regional/State Variations** – Scroll through the creative at the top to view regional/state variations. Text on the creative will indicate it's usage.
- 3) **Print a Sample Creative** – Click “Print Sample”
- 4) Click **“Done”** to return to the tactic screen



Item Details

[Back To Search Results](#)

Available in House & Home states only

Call today to learn more about this campaign!
1-800-855-1234
or visit us online at [www.allstate.com](#)



Call Allstate Agent
1-800-855-1234
or visit us online at [www.allstate.com](#)

Auto/Home Prospecting DM 2017

This direct mail campaign targets prospects with a higher likelihood to request a quote and result in a sale of one or more Allstate policies. The criteria includes over 2,000 demographic variables, such as age, address type, marital status, occupation type, home value, etc. Criteria is continually updated based on the performance of recently completed campaigns.

Each month the mail file will be rank ordered based on the likelihood of each prospect to respond to direct mail. The top prospects, depending on enrollment preferences, in the file will be selected to receive a prospecting mailing. The creative that is used (Auto or Home) will depend on the prospects in the file and the best creative for them. It is possible that on a monthly basis you could have all Auto mailed and no Home (or vice versa) or a combination of both Auto and Home.

NOTE: Volume and total price for this campaign represent your **annual commitment**. Selected volume is not a guarantee and is based on lead availability. The mailings will drop monthly, through November.

Available For: Direct Mail

[Favorite](#)

[Campaign](#)

Pricing Information

\$0.22 per piece on the first 250 pieces a month; \$0.44 per piece on any volume over 250

Additional Details

Inventory Code: 0100AUTOHOMEPEM

The following delivery channel will be used:

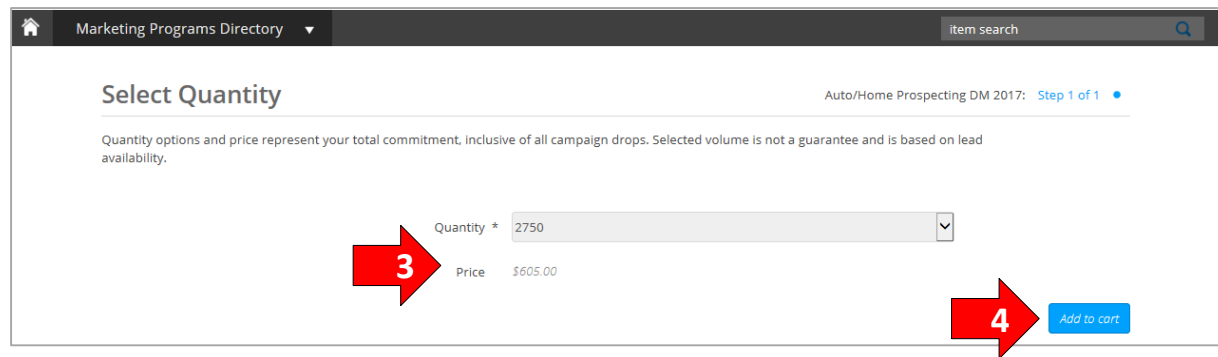
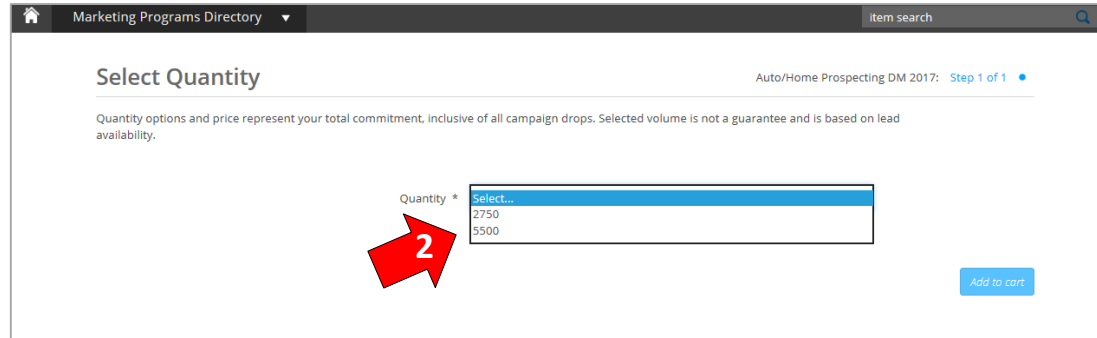
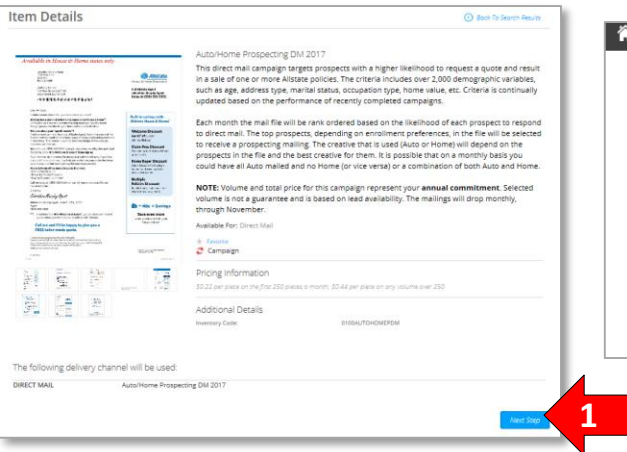
DIRECT MAIL

Auto/Home Prospecting DM 2017

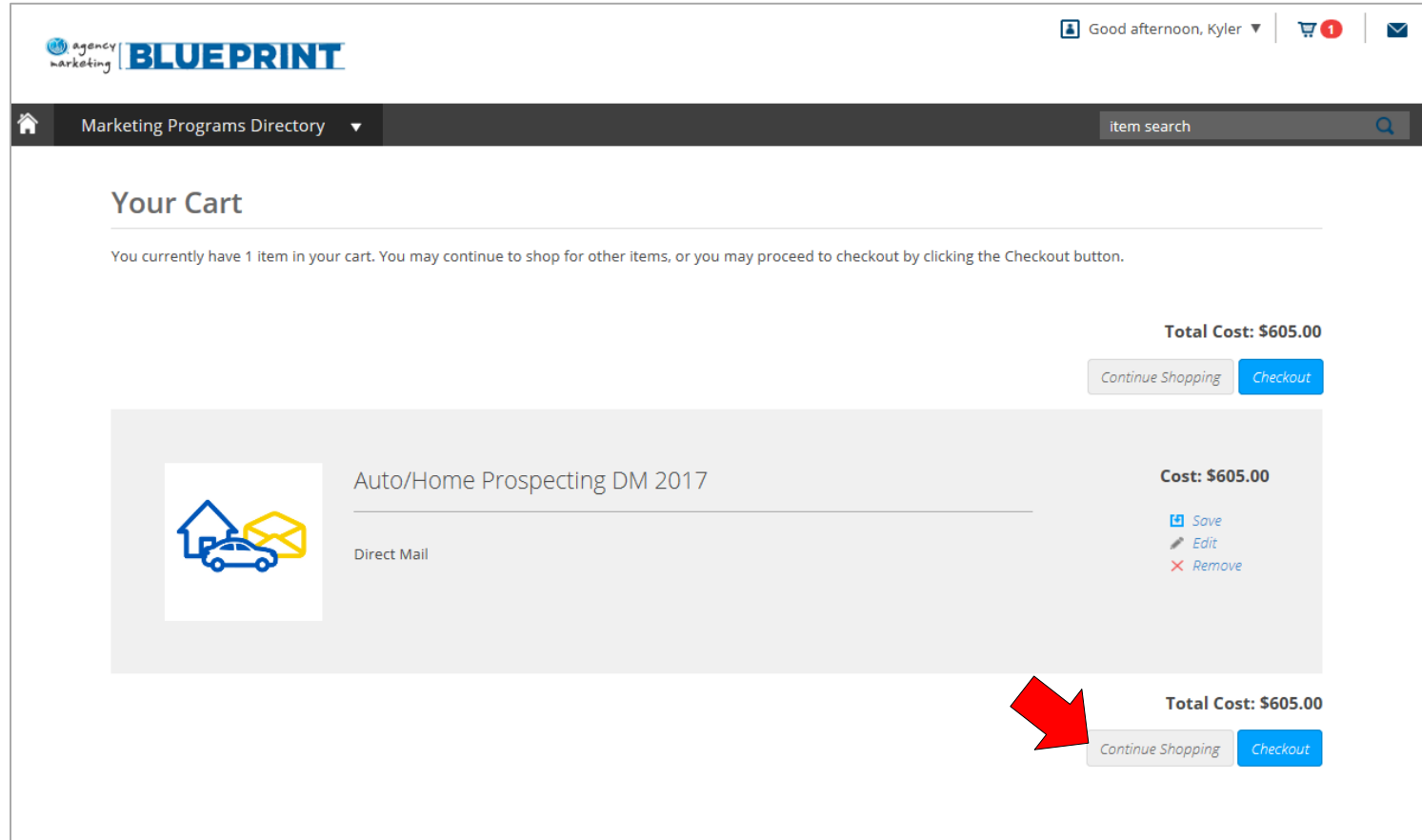
[Next Step](#)

Click “[Back to Search Results](#)” to return to the results screen and view other direct mail campaigns, emails or other programs

If you want to enroll in this campaign, click “[Next Step](#)” to continue to volume options



- 1) Click “Next Step” on the tactic page to continue to the Quantity Selector
- 2) Choose your quantity
Note: This amount includes ALL campaign drops
- 3) The price will reflect total cost of all campaign drops
- 4) Select “Add to cart”



The direct mail campaign is now in your cart. Let's [continue shopping](#)!

The screenshot shows the 'Marketing Programs Directory' page. At the top, there's a header with the Agency Marketing Blueprint logo and a user greeting 'Good afternoon, Tyler'. Below the header, a dropdown menu is set to 'Marketing Programs Directory'. A search bar is located to the right of the dropdown. The main content area is titled 'Search Results' and shows 'Showing 1 to 5 of 5 results for 'Find Running My Agency Programs''. On the left, there's a 'Narrow Your Results' panel with filters for Audience (Customer (5)), Channel (Marketing & Sales (5)), and Business Objective (Running My Agency (5)). The main list displays five programs: LSP Assessments, Extra Hands Business Hours Call Forwarding, Agency Sales Academy (ASA), Greg Gray Customer Experience Website, and Risk Advisor Mastermind Group Membership. Each program entry includes its name, availability, inventory code, and a 'Favorite' button. Red arrows 1, 2, and 3 highlight the dropdown menu, the filter panel, and a search icon respectively.

- 1) **Marketing Programs Directory** – Clicking a Business Objective from the Marketing Programs Directory will display all relevant programs, direct mail campaigns and email campaigns.
- 2) **Narrow Your Results** – Use the filters to narrow down your results by target, availability and/or program type
TIP: You can use multiple filters at once!
- 3) **Choose a Tactic** – To see more details about the offering or see which vendors are available, you can select the tactic by clicking on it

The screenshot shows the 'Item Details' page for 'LSP Assessments'. The page layout includes a header with the Agency Marketing Blueprint logo and a user greeting. Below the header is a navigation bar with 'Marketing Programs Directory' and a search bar. The main content area is titled 'Item Details' and features a large image of a magnifying glass over a person icon. To the right of the image, the program name 'LSP Assessments' is displayed, followed by a detailed description of the service, including its benefits and pricing. Below the description, there are links for 'Favorite' and 'Enrollment Program'. At the bottom of the page, there is a section for 'Additional Details' with an 'Inventory Code' and a 'Pricing' field. A red arrow labeled '1' points to the program name, a red arrow labeled '2' points to the description, and a red arrow labeled '3' points to the 'Add to cart' button.

Good afternoon, Kyler

Marketing Programs Directory

item search

Item Details

[Back To Search Results](#)

LSP Assessments

IdealTraits assists agencies to attract, assess, and identify top performing LSP's and CSR's. Utilizing integrated job posting tools in conjunction with IdealTraits 92.6% valid assessments, will give you detailed information to make the right hiring decisions for your agency.

This offer includes unlimited assessments, job posting (with a job builder, posting to numerous job aggregator sites and an agency branded job landing page) and job sharing to share your job ad with social media sites.

This program is offered at a 50% cost share. Pricing below reflects this discount. Program subscription expires on 12/31/17.

Available For: Marketing & Sales

★ Favorite

📅 Enrollment Program

Additional Details

Inventory Code: 3200LSPA

Please select from the following.

IdealTraits (2017 subscription, unlimited assessments & job posting services)
Inventory Code: 0LSPAIT2017
[More information](#)

Pricing: \$399.00






☐ Select

[Add to cart](#)

- 1) **Select a Program** – Click the tactic you are interested in from the results page (shown on prior page) to view available vendors and programs
- 2) **Tactic Details** – Read the description of the tactic for more details
- 3) **Select and Add to Cart** – When you have selected the program you want to enroll in, you can “Add to Cart”

Placing an Order for a Program – Radio Buttons vs. Check Boxes

Please select from the following.







| | | | |
|---|---|---------------------|---|
|  | TRI (2017 Home: Next Day Email Delivery, 60 leads) Inventory Code: 00TTRINDED60NE More Information | Pricing: \$1,170.00 | <input checked="" type="radio"/> Select |
|  | TRI (2017 Auto: Live Call Transfer, 60 leads) Inventory Code: 00TTRILCT60 More Information | Pricing: \$1,170.00 | <input type="radio"/> Select |
|  | TRI (2017 Auto: Next Day Email Delivery, 120 leads) Inventory Code: 00TTRINDED120 More Information | Pricing: \$1,980.00 | <input type="radio"/> Select |
|  | HBW (2017 Home: Next Day Email Delivery, 60 leads) Inventory Code: 00UUBWNEDED60NE More Information | Pricing: \$1,170.00 | <input type="radio"/> Select |
|  | HBW (2017 Auto: Next Day Email Delivery, 120 leads) Inventory Code: 00UUBWNEDED120 More Information | Pricing: \$1,800.00 | <input type="radio"/> Select |

Programs on the site will either have ‘Radio Button’ or ‘Checkbox’ functionality. If the program is selected by clicking on a circle icon, or Radio Button, you may only enroll in **one** program on the screen.

Example: Agent may choose one of the tactics above, such as TRI 60 leads. Agent will not be able to select multiple offers within this page.

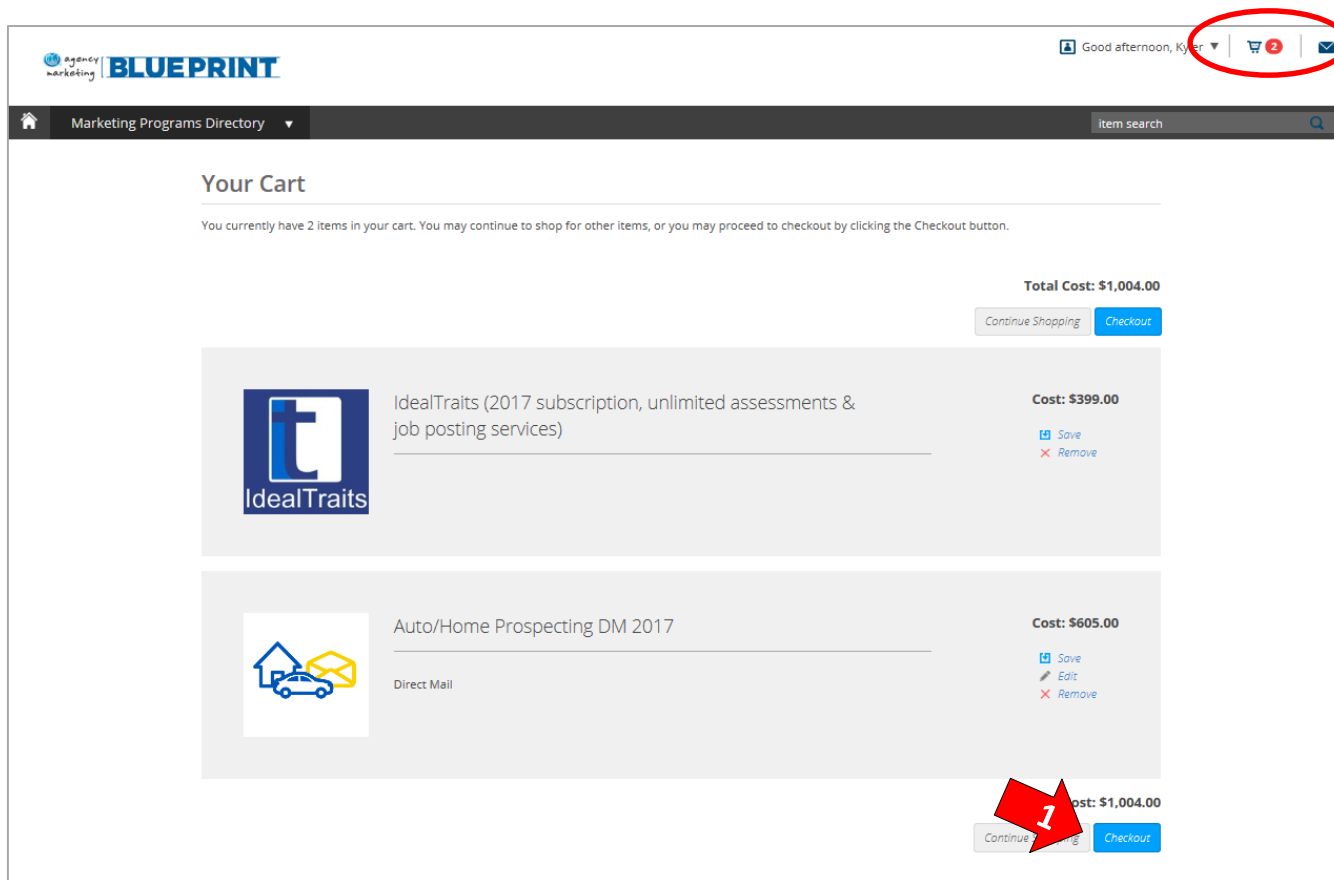
Placing an Order for a Program – Radio Buttons vs. Check Boxes

Please select from the following.

| | | | |
|---|--|------------------|--|
|  | Purple Purse 2017 "Purse-onalize" Your Community Toolkit Inventory Code: 01PPCT More Information | Pricing: \$15.00 | <input checked="" type="checkbox"/> Select |
|  | Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide Inventory Code: 02PPDVCCG More Information | Pricing: \$30.00 | <input checked="" type="checkbox"/> Select |
|  | X the TXT 2017 Inventory Code: 03XTT More Information | Pricing: \$90.00 | <input checked="" type="checkbox"/> Select |
|  | WE Volunteer Now 2017 Grant Activation Kit Inventory Code: 04WE More Information | Pricing: \$10.00 | <input checked="" type="checkbox"/> Select |
|  | Allstate Foundation Disaster Preparedness 2017 Toolkit (20 kits) Inventory Code: 05AFDP20 More Information | Pricing: \$20.00 | <input type="checkbox"/> Select |
|  | Allstate Foundation Disaster Preparedness 2017 Toolkit (40 kits) Inventory Code: 05AFDP40 More Information | Pricing: \$40.00 | <input type="checkbox"/> Select |

If the program is selected by clicking on the square check boxes, you may only enroll in **multiple** programs on the screen.

Example: Agent may choose one, a few, or all of the tactics above. In this example, the agent has decided to enroll in Purple Purse (x2), X the TXT and We Volunteer from the listed offers.



- 1) When you have finished adding your desired direct mail campaigns, email campaigns and/or programs to your cart, you can select “Checkout” to continue to the Payment Screen

TIP: You can click the shopping cart (top right) at any time to return to your cart



Payments

All transactions are FINAL and are not subject to refunds under any circumstances. Additionally, there are no modifications after the annual and ongoing enrollment periods close.

PLEASE SET YOUR PAYMENT PRIORITIES AND DEFAULTS FOR DIRECT MAIL ON THE PAYMENT MANAGEMENT SCREEN

To apply payment priorities and default selections to your previously placed direct mail orders, please go to the Payment Management screen, select the checkbox and save.

[Go to Payment Management](#)

ORDER SUMMARY

DIRECT MAIL TO BE PAID LATER (DEFERRED)

| | QTY | PRICE | TOTAL |
|--|-------|--------|------------|
| Centralized Auto ReQuote with Direct Mail 2017 | 6,000 | \$0.31 | \$1,830.00 |
| Boat Prospecting DM 2017 | 600 | \$0.21 | \$126.00 |
| Auto/Home Prospecting DM 2017 | 2,750 | \$0.22 | \$605.00 |

PROGRAMS TO BE PAID NOW

| | QTY | PRICE | TOTAL |
|---|-----|---------|---------|
| Allstate Foundation Disaster Preparedness 2017 Toolkit (20 kits) | 1 | \$20.00 | \$20.00 |
| WE Volunteer Now 2017 Grant Activation Kit | 1 | \$10.00 | \$10.00 |
| X the TXT 2017 | 1 | \$90.00 | \$90.00 |
| Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide | 1 | \$30.00 | \$30.00 |
| Purple Purse 2017 "Purse-onalize" Your Community Toolkit | 1 | \$15.00 | \$15.00 |

Subtotal \$165.00
Shipping \$0.00
Total Cost of Order \$2,726.00
Maximum to be paid later \$2,561.00
Pay Now \$165.00

Once you select "checkout" you will be directed to the [Payments](#) screen. Here you will see the breakdown of your order.

- 1) [Direct Mail To Be Paid Later](#) – This lists the direct mail in your cart. Direct mail is a deferred payment, so you will **not** pay this charge at the time of checkout.
- 2) [Programs To Be Paid Now](#) – This lists the programs in your cart. Programs are paid at the time of checkout.
- 3) [Maximum to be paid later](#) – Direct mail is billed based on the quantity mailed, so you will only pay for what you use. This total represents the full amount of mail possible that could be charged.
- 4) [Pay Now](#) – This lists the total amount to be paid at the time of checkout.

Good evening, Kyler

0

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Marketing Programs Directory

Item search

Payments

All transactions are FINAL and are not subject to refunds under any circumstances. Additionally, there are no modifications after the annual and ongoing enrollment periods close.

PLEASE SET YOUR PAYMENT PRIORITIES AND DEFAULTS FOR DIRECT MAIL ON THE PAYMENT MANAGEMENT SCREEN

To apply payment priorities and default selections to your previously placed direct mail orders, please go to the Payment Management screen, select the checkbox and save.

Go to Payment Management

ORDER SUMMARY

| | QTY | PRICE | TOTAL | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-------|---------|------------|--|-----|-------|-------|--|---|---------|---------|--|---|---------|---------|--|---|---------|---------|---|---|---------|---------|---|---|---------|---------|
| <div> DIRECT MAIL TO BE PAID LATER (DEFERRED) </div> <div> Centralized Auto ReQuote with Direct Mail 2017 </div> <div> Your payment methods have been set. Override with different payment method below if desired. </div> | 6,000 | \$0.31 | \$1,830.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> Boat Prospecting DM 2017 </div> <div> Your payment methods have been set. Override with different payment method below if desired. </div> | 600 | \$0.21 | \$126.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> Auto/Home Prospecting DM 2017 </div> <div> Your payment methods have been set. Override with different payment method below if desired. </div> | 2,750 | \$0.22 | \$605.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> PROGRAMS TO BE PAID NOW </div> <table> <thead> <tr> <th></th> <th>QTY</th> <th>PRICE</th> <th>TOTAL</th> </tr> </thead> <tbody> <tr> <td>Allstate Foundation Disaster Preparedness 2017 Toolkit (20 kits) more ></td> <td>1</td> <td>\$20.00</td> <td>\$20.00</td> </tr> <tr> <td>WE Volunteer Now 2017 Grant Activation Kit more ></td> <td>1</td> <td>\$10.00</td> <td>\$10.00</td> </tr> <tr> <td>X the TXT 2017 more ></td> <td>1</td> <td>\$90.00</td> <td>\$90.00</td> </tr> <tr> <td>Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide more ></td> <td>1</td> <td>\$30.00</td> <td>\$30.00</td> </tr> <tr> <td>Purple Purse 2017 "Purse-onalze" Your Community Toolkit more ></td> <td>1</td> <td>\$15.00</td> <td>\$15.00</td> </tr> </tbody> </table> | | | | | QTY | PRICE | TOTAL | Allstate Foundation Disaster Preparedness 2017 Toolkit (20 kits) more > | 1 | \$20.00 | \$20.00 | WE Volunteer Now 2017 Grant Activation Kit more > | 1 | \$10.00 | \$10.00 | X the TXT 2017 more > | 1 | \$90.00 | \$90.00 | Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide more > | 1 | \$30.00 | \$30.00 | Purple Purse 2017 "Purse-onalze" Your Community Toolkit more > | 1 | \$15.00 | \$15.00 |
| | QTY | PRICE | TOTAL | | | | | | | | | | | | | | | | | | | | | | | | |
| Allstate Foundation Disaster Preparedness 2017 Toolkit (20 kits) more > | 1 | \$20.00 | \$20.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| WE Volunteer Now 2017 Grant Activation Kit more > | 1 | \$10.00 | \$10.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| X the TXT 2017 more > | 1 | \$90.00 | \$90.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide more > | 1 | \$30.00 | \$30.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Purple Purse 2017 "Purse-onalze" Your Community Toolkit more > | 1 | \$15.00 | \$15.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Subtotal | | | \$165.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Shipping | | | \$0.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Cost of Order | | | \$2,726.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Maximum to be paid later | | | \$2,561.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Pay Now | | | \$165.00 | | | | | | | | | | | | | | | | | | | | | | | | |

Once you are comfortable with the campaigns and programs on the payments screen, you will want to go to the [Payment Management Screen](#) to set your Direct Mail billing preferences.

This screen can be accessed by selecting the blue ["Go to Payment Management"](#) button located above the **Order Summary**.


Direct Mail Payment Management

Direct mail will attempt to bill in the order credits and credit cards are listed below.

MANAGE PAYMENT DEFAULTS AND PRIORITIES FOR DIRECT MAIL ORDERS.

[Add a credit card](#)

If a credit or credit card is defaulted to yes, it will be attempted as a payment. If it says N/A, it will not be attempted. To reorder your credits or credit cards, drag and drop them into the desired order.



| DEFAULT | BILLING PRIORITY | ACCOUNT DESCRIPTION | EXPIRATION DATE | DATE ADDED TO BLUEPRINT |
|---|------------------|---|-----------------|-------------------------|
| <input checked="" type="checkbox"/> N/A | 1 | Blueprint Credit | | 12/04/2015 |
| <input checked="" type="checkbox"/> N/A | 2 | Commission Deduct Account | | 11/04/2015 |
| <input checked="" type="checkbox"/> N/A | 3 | 2017 Fast Start Credit | | 09/30/2016 |
| <input checked="" type="checkbox"/> N/A | 4 | Executive Advantage Plus Card ending in | 07/31/2019 | 03/07/2016 |

☐ Apply my selections to current/existing direct mail campaigns that have not yet billed. Please note, direct mail that has already been billed cannot be changed.

[Exit](#)

[Save Changes](#)

The [Payment Management Screen](#) is where you will set your billing preferences for Direct Mail.

- 1) [Default](#) – This toggle feature indicates if you would like a particular payment method to be used for billing.
- 2) [Billing Priority](#) – This indicates the order in which you would like the site to attempt to bill your Direct Mail. If the top billing priority does not have enough funds to pay for the campaign, the site will bill the next payment method listed as a billing priority (example scenario ahead).
- 3) [Account Description](#) – This displays the payment methods available on the site.

Direct Mail Payment Management

Direct mail will attempt to bill in the order credits and credit cards are listed below.

MANAGE PAYMENT DEFAULTS AND PRIORITIES FOR DIRECT MAIL ORDERS.

[Add a credit card](#)

If a credit or credit card is defaulted to yes, it will be attempted as a payment. If it says N/A, it will not be attempted. To reorder your credits or credit cards, drag and drop them into the desired order.

| DEFAULT | BILLING PRIORITY | ACCOUNT DESCRIPTION | EXPIRATION DATE |
|---|------------------|---|-----------------|
| <input checked="" type="checkbox"/> N/A | 1 | Blueprint Credit | |
| <input checked="" type="checkbox"/> N/A | 2 | Commission Deduct Account | |
| <input checked="" type="checkbox"/> N/A | 3 | 2017 Fast Start Credit | |
| <input checked="" type="checkbox"/> N/A | 4 | Executive Advantage Plus Card ending in | 07/31/2019 |

☐ Apply my selections to current/existing direct mail campaigns that have not yet billed. Please note, direct mail that has already been billed cannot be changed.

[Exit](#) [Save Changes](#)

Add a credit card

CREDIT CARD INFORMATION

Credit Card *

Card Type

Visa

Card Number

4112344112344113

Card Code

123

Expiration Month

February

Expiration Year

2017

ADDRESS INFORMATION

Card Holder's First Name *

Kyler

Card Holder's Last Name *

Cross

Address Line 1 *

123 Allstate St.

City *

Chicago

State *

Illinois

Zip *

60657

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

- 1) **Add a credit card** - The first step on the payment screen is to add any additional cards you would like to use for billing, such as a personal or business credit card. **Please note** that you are not required to add additional cards.
- 2) Once you have added this card(s), it will appear in the payment management screen as a usable payment method under **Account Description** (e.g. **Visa ending in 4113**).
- 3) Now you can reorder your credits and/or credit cards by dragging and dropping them into the desired order in the **Default** column.

Direct Mail Payment Management

Direct mail will attempt to bill in the order credits and credit cards are listed below.

MANAGE PAYMENT DEFAULTS AND PRIORITIES FOR DIRECT MAIL ORDERS.

[Add a credit card](#)

If a credit or credit card is defaulted to yes, it will be attempted as a payment. If it says N/A, it will not be attempted. To reorder your credits or credit cards, drag and drop them into the desired order.

| DEFAULT | BILLING PRIORITY | ACCOUNT DESCRIPTION | EXPIRATION DATE | DATE ADDED TO BLUEPRINT |
|--|------------------|---|-----------------|-------------------------|
| <input checked="" type="checkbox"/> No | 1 | Visa ending in 4113 | 02/27/2017 | 10/11/2016 |
| <input checked="" type="checkbox"/> No | 2 | Blueprint Credit | | 12/04/2015 |
| <input checked="" type="checkbox"/> No | 3 | Commission Deduct Account | | 11/04/2015 |
| <input checked="" type="checkbox"/> No | 4 | 2017 Fast Start Credit | | 09/30/2016 |
| <input checked="" type="checkbox"/> No | 5 | Executive Advantage Plus Card ending in | 07/31/2019 | 03/07/2016 |

☐ Apply my selections to current/existing direct mail campaigns that have not yet billed. Please note, direct mail that has already been billed cannot be changed.

[Exit](#) [Save Changes](#)

Direct Mail Payment Management

Direct mail will attempt to bill in the order credits and credit cards are listed below.

MANAGE PAYMENT DEFAULTS AND PRIORITIES FOR DIRECT MAIL ORDERS.

[Add a credit card](#)

If a credit or credit card is defaulted to yes, it will be attempted as a payment. If it says N/A, it will not be attempted. To reorder your credits or credit cards, drag and drop them into the desired order.

| DEFAULT | BILLING PRIORITY | ACCOUNT DESCRIPTION | EXPIRATION DATE | DATE ADDED TO BLUEPRINT |
|-------------------------------------|------------------|--|-----------------|-------------------------|
| <input checked="" type="checkbox"/> | 1 | 2017 Fast Start Credit | | 09/30/2016 |
| <input checked="" type="checkbox"/> | 2 | Executive Advantage Plus Card ending i | 07/31/2019 | 03/07/2016 |
| <input checked="" type="checkbox"/> | 3 | Visa ending in 4113 | 02/27/2017 | 10/11/2016 |
| <input type="checkbox"/> | 4 | Blueprint Credit | | 12/04/2015 |
| <input type="checkbox"/> | 5 | Commission Deduct Account | | 11/04/2015 |

☒ Apply my selections to current/existing direct mail campaigns that have not yet billed. Please note, direct mail that has already been billed cannot be changed.

[Exit](#)

[Save Changes](#)

- 1) This agent has used the drag and drop feature to determine the DM billing priority for the desired payment methods listed (Buttons toggled to Yes). **Please note** you are not required to toggle all billing methods on – only those desired. The site will **not** attempt to bill any payment methods listed as No or NA (Buttons toggled to No)
- 2) **Important Note:** Once you have finalized your DM billing preferences, you will want to select the checkbox at the bottom of the page in **red**. This applies your billing preferences to any current/future DM campaigns that have not yet billed. **Please note, any DM that has already been billed cannot be changed.**

Direct Mail Payment Management

Direct mail will attempt to bill in the order credits and credit cards are listed below.

MANAGE PAYMENT DEFAULTS AND PRIORITIES FOR DIRECT MAIL ORDERS.

[Add a credit card](#)

If a credit or credit card is defaulted to yes, it will be attempted as a payment. If it says N/A, it will not be attempted. To reorder your credits or credit cards, drag and drop them into the desired order.

| DEFAULT | BILLING PRIORITY | ACCOUNT DESCRIPTION | EXPIRATION DATE | DATE ADDED TO BLUEPRINT |
|-------------------------------------|------------------|--|-----------------|-------------------------|
| <input checked="" type="checkbox"/> | 1 | 2017 Fast Start Credit | | 09/30/2016 |
| <input checked="" type="checkbox"/> | 2 | Executive Advantage Plus Card ending i | 07/31/2019 | 03/07/2016 |
| <input checked="" type="checkbox"/> | 3 | Visa ending in 4113 | 02/27/2017 | 10/11/2016 |
| <input type="checkbox"/> | 4 | Blueprint Credit | | 12/04/2015 |
| <input type="checkbox"/> | 5 | Commission Deduct Account | | 11/04/2015 |

☒ Apply my selections to current/existing direct mail campaigns that have not yet billed. Please note, direct mail that has already been billed cannot be changed.

[Save Changes](#)

1

- Once you have returned to your cart, you will select the **"Checkout"** button to proceed to the **Payment Screen**.

- Once you have completed all steps on the Payment Management Screen, you will **"Save Changes"** and return to cart by selecting the cart image at the top right of the screen:



Good afternoon, Tyler

Marketing Programs Directory

Your Cart

You currently have 2 items in your cart. You may continue to shop for other items, or you may proceed to checkout by clicking the Checkout button.

Total Cost: \$1,004.00

[Continue Shopping](#) [Checkout](#)

IdealTraits (2017 subscription, unlimited assessments & job posting services)

Cost: \$399.00

[Save](#) [Edit](#) [Remove](#)

Auto/Home Prospecting DM 2017

Direct Mail

Cost: \$605.00

[Save](#) [Edit](#) [Remove](#)

Total Cost: \$1,004.00

[Continue Shopping](#) [Checkout](#)

2

PROGRAMS TO BE PAID NOW

| | QTY | PRICE | TOTAL |
|---|-----|---------|-----------------|
| WE Volunteer Now 2017 Grant Activation Kit more > | 1 | \$10.00 | \$10.00 |
| X the TXT 2017 more > | 1 | \$90.00 | \$90.00 |
| Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide more > | 1 | \$30.00 | \$30.00 |
| Subtotal | | | \$130.00 |
| Shipping | | | \$0.00 |
| Total Cost of Order | | | \$1,140.00 |
| Maximum to be paid later | | | \$1,010.00 |
| Pay Now | | | \$130.00 |

PAYMENT [Add a credit card](#)

☒ 2017 Fast Start Credit Available Balance: \$4,739.00 Amount to Apply: \$

☒ Visa ending in 4113 Amount to Apply: \$

Total Payment: \$130.00

[Back to Cart](#) [Submit Order](#)

- 1) At the bottom of the payments screen, you will find the **Payment Methods** available for purchasing programs. You can disperse your total payment due between as many options as you would like (*This agent has chosen to place all of the \$130 due at checkout on the 2017 Fast Start Credit, however, they could also disperse some of the payment onto the Visa if they preferred*).
- 2) You will also find the **Total Payment** due at checkout (**Reminder:** This total does not include your Direct Mail deferred payments).
- 3) Once you are ready to checkout, you can select “[Submit Order](#)” to purchase your 2017 Marketing Blueprint package! You will receive an email confirmation from MarketingBlueprint@allstate.com with a summary of your order.

Marketing Programs Directory

Good morning, A

item search

Orders

From Date

Order Id

To Date

Order Name

Clear
Search

Currently displaying all 19 records

| ORDER # | DATE | ORDER INFO | ACTIONS |
|---------|---|---|---|
| 196356 | Order Date: 10/11/2016 Creation Date: 10/11/2016 | Name: Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide Owner: | Channel: Marketing & Sales Status: Enrolled Details |
| 196355 | Order Date: 10/11/2016 Creation Date: 10/11/2016 | Name: X the TXT 2017 Owner: A | Channel: Marketing & Sales Status: In process Details |
| 196354 | Order Date: 10/11/2016 Creation Date: 10/11/2016 | Name: WE Volunteer Now 2017 Grant Activation Kit Owner: | Channel: Marketing & Sales Status: Enrolled Details |



Once your order has been submitted, you will be directed to the “My Orders” page to review your purchases. If you would like to cancel an order, or have purchased something by mistake, you will need to select the blue “Details” button in the **Actions** column for the tactic(s) you would like to cancel.

Please Note: You will only have the ability to cancel 2017 orders directly on the site during Annual Enrollment.

| ORDER # | DATE | ORDER INFO | ACTIONS |
|---------|---|---|-------------------------|
| 196356 | Order Date: 10/11/2016 Creation Date: 10/11/2016 | Name: Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide Channel: Marketing & Sales Status: Enrolled Owner: | Details |

Order Details

Order ID: 196356

Order Summary

Order Name: Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide
Channel: Marketing & Sales
Order Owner: Anita Avila
Order Confirmation Email Address: foo@direxidsmarketing.com

PROGRAMS ORDERED

Name: Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide (02PPDVCCG)

PAYMENT SUMMARY

Program Cost:

| Cost Breakdown | QTY | PRICE | AMOUNT |
|---|-----|---------|----------------|
| Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide | 1 | \$30.00 | \$30.00 |
| Total Cost of Order | | | \$30.00 |

Payment Breakdown:

Account

2017 Fast Start Credit

Cancel Order

Are you sure you want to cancel order number 196356, Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide ?

No Yes

| | | |
|---|---|-------------------------|
| Name: Purple Purse 2017 Domestic Violence Curriculum and Coaching Guide Owner: / | Channel: Marketing & Sales Status: Cancelled | Details |
|---|---|-------------------------|

- 1) Once you have selected the blue "Details" button, you will see all details associated with the tactic.
- 2) To proceed with cancelling the order, you will need to select the gray "Cancel" button at the top right of the order details.
- 3) You will be prompted with a cancellation confirmation pop-up. Select "Yes" to finalize the cancellation.
- 4) When you return to the "My Orders" page, your cancelled order will display a "Cancelled" status.

Questions on the Blueprint programs or pricing?

Please contact the Blueprint team at MarketingBlueprint@allstate.com or your regional marketing consultant

Need technical support getting through the enrollment site?

Please contact technicalsupport@agencymarketingblueprint.com or call 866-497-5888