

Branch ConnectionPoint® New Personal Order

Follow the steps for submitting a New Personal Order. If you need assistance, please contact Harland Clarke Technical Service for assistance at 1-800-643-5737. You may save a copy, print and add your personal notes. The Branch ConnectionPoint® Reference Guide is available in the Introduction module.

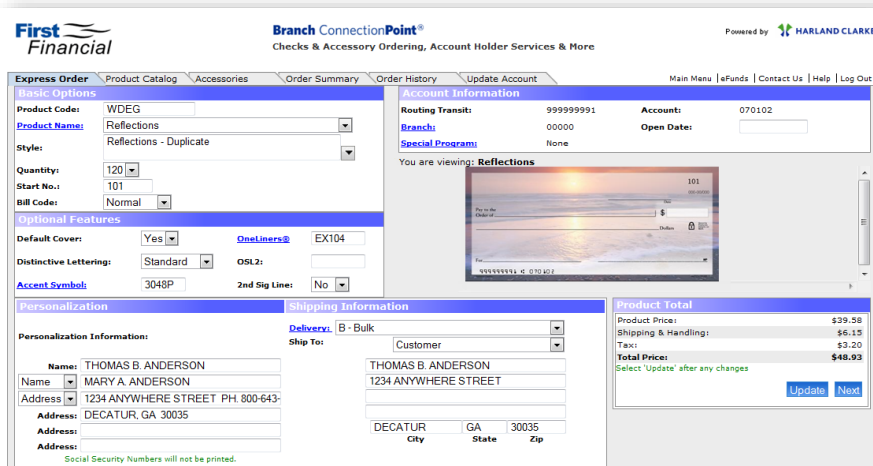
New Personal Order

1. After entering the client's account number information and Account Type in the Account Information panel on the Main Menu, the Product Catalog page will load. Select a product from the catalog by clicking its image or hyperlink.

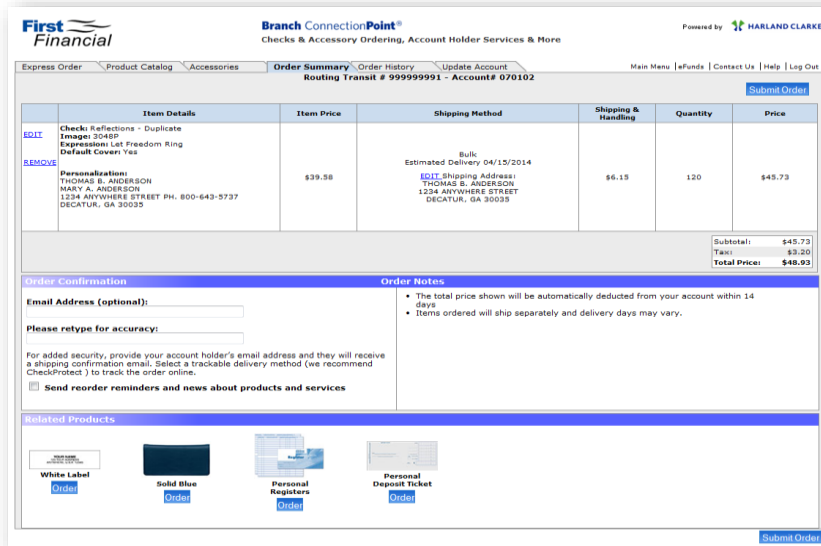


2. On the [Express Order](#) page, make changes to the following sections.

Account Information	Branch Number, Special Program, Open Date
Basic Options	Product Code, Product Name, Style, Quantity, Start Number and Bill Code
Optional Features	Default Cover, Distinctive Lettering, Accent Symbol, OneLiners®, 2 nd Sig Line
Personalization	Name and Address information
Shipping Information	Shipping Address, Delivery Method, and Ship To



- The Product Total panel will display pricing for the order. Select the **Update** button after any changes. Then select the Next button.
- Review the order details on the Order Summary page. Click the **Edit** links to make changes to the order. Click the **Remove** link to remove an item from the order.
- If the order is shipping via Expedited, track able delivery, enter the account holder's email address in the Order Confirmation panel. A shipping notification email will be sent to the account holder when the order ships.
- To include related products, select the **Order** button in the Related Products panel or from the Accessories page. Edit the Related product, select **Update**, and then **Next** to return to the Order Summary page.
- Verify all information is complete and accurate. Click the **Submit Order** button to place your order.
- Click the Return to Main Menu button or link to return to the Main Menu. Or, select the Log Out button/link to exit the ordering web site.



Updating the Order

To make changes or corrections to a submitted order before it ships:

- Select the Order History tab.
- Select the order record with an In Process status.
- Select the **Update Order** button.
- Make the necessary changes on the Express Order page. Select **Update**, then **Next**.
- Review the Order Summary page, then select **Submit Order**. The original order will be canceled and updated order placed into production.

