

Introduction

Dear NGL Agent,

SouthWest Direct[®] (SWD) would like to welcome you to our partnership with NGL Insurance Group! We know that you will be extremely satisfied with your new Final Expense online lead and marketing materials ordering system, as well as the other marketing products and services we provide to our customers.

This instruction booklet will show you step-by-step how to register, view available materials, place campaigns, list orders, maintain campaign results, and perform many other tasks within the online ordering system.

Your NGL Support Team is available by fax, e-mail and phone Monday through Friday, 8-5PM eastern standard time. Should you need online support, have questions, or if you would like to schedule an online webinar training session, please contact us at 1-800-968-5798 x 24 or x 53 or email us at info@swdirectnglfe.com.

We look forward to serving you,

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Registration

1. Upon your first time arriving to the website, www.swdirectnglfe.com, please click on the register button on the homepage.



Helpful Hint

If you need to go back to a previous page, always use the website's back button, not your browser's back button. This will ensure that your information will not be lost if you need to go back.

2. Fill in your username, password, email address and choose a security question and answer, Then click "next".
3. Fill in your company information, and contact phone numbers then click "next".
4. Fill in your address location information, firm tagline, email address, website, and phone number you want to appear on the mailings. You must click the check box next to item for it to be included on your mailing. The first location you enter will be your default address, but you can enter as many locations as you desire once registration is complete.
5. The SWD permit is the default. By using SWD permit we can track the reply's and response rates and your leads will be uploaded daily. If you desire to use your own permit, click the box indicating that you have a permit. Enter in the address of your permit and the permit #. When finished, click "next".
6. If you have a SAN number, enter your SAN number, expiration date and area codes you are telemarketing. You only need to have a SAN number when ordering phone numbers with your lists. When finished, click "finished". NOTE: If you do not yet have a SAN number, you can register to get one at <http://telemarketing.donotcall.gov> or we can assist you in obtaining a SAN number by [calling us at 800.968.5798 x 53 or x24](tel:800.968.5798).
7. Upon clicking "finished", the site will take you directly to the product catalog, where you are now ready to view products and/or place an order. **You must now use your login and password to access the site going forward.**

Helpful Hint

What is a SAN number? "SAN" stands for Subscription Account Number, and if you are a seller that makes (or hires others to make) outbound telephonic sales calls anywhere in the United States, you need to get a SAN right away.

Once registered you can change account information:

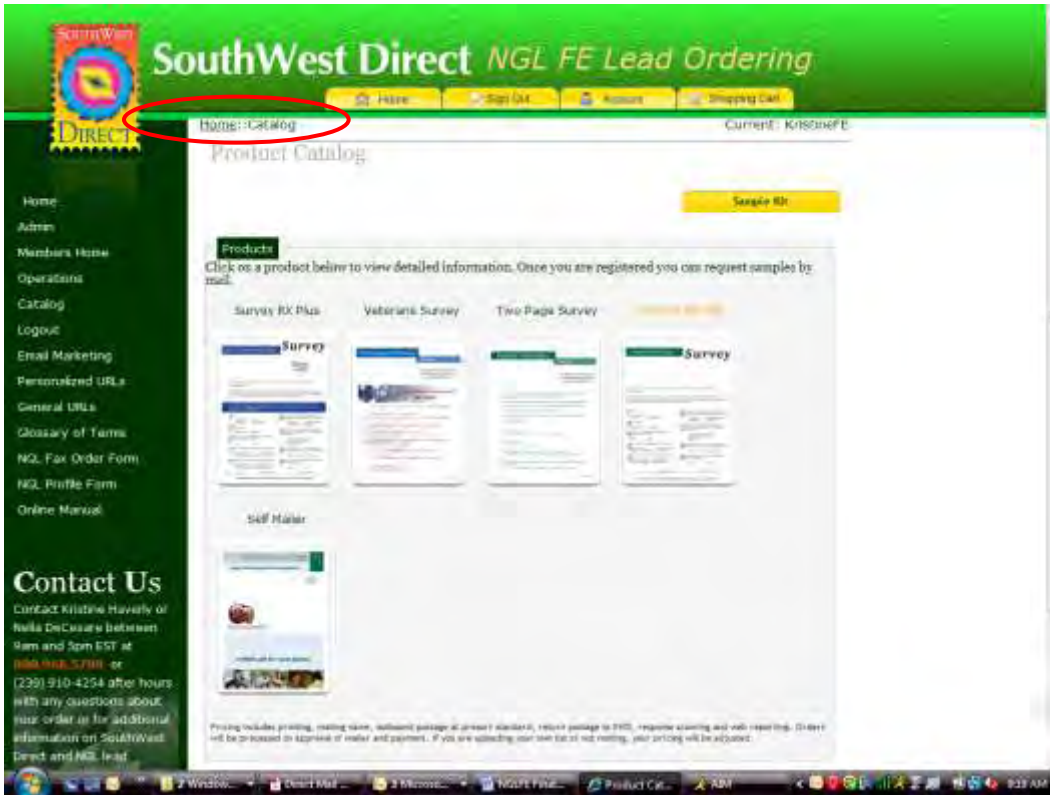


1. By clicking on the account tab at the top of the screen you can update or change account information and look at your orders.
2. Each tab is clickable and has a place to edit and update your information.

View Products

The site currently offers these products:

- Survey 1 Rx Plus
- Survey 2 Veterans
- Survey 3 Two Page
- Survey 4 No Gift
- Self mailer



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Helpful Hint
Upon logging in to the site, you can immediately start ordering by going to the Members Home Page. Do this by clicking on "Members" on the left sidebar navigation menu.
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On the catalog product page, you can click on each product to view a brief description of mailer along with response rates or view a PDF.

Once registered you can also request samples mailed to you.

If you are ready to create your campaign and start ordering, just click "Start New Campaign" on left side navigation menu.

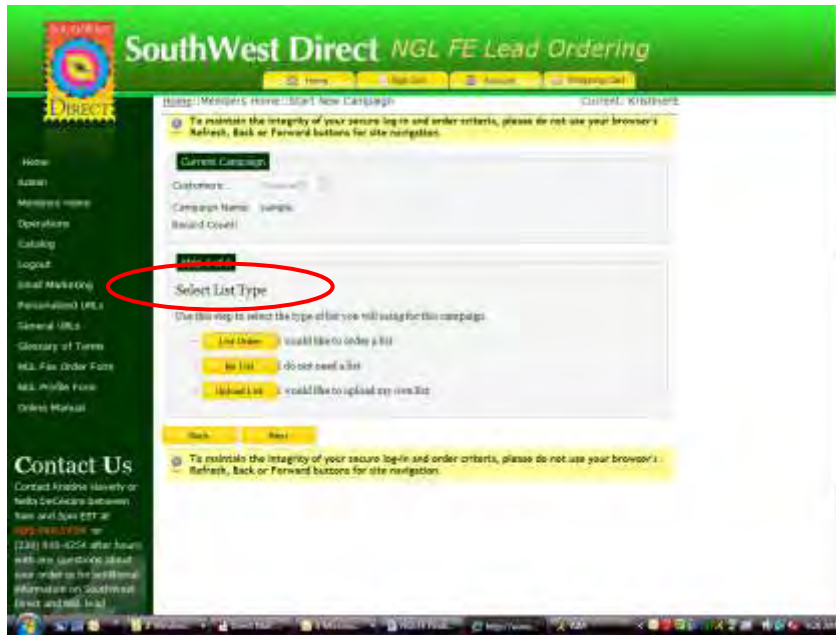
Starting a New Campaign

Once you are logged in you can start your campaign, just follow these steps to proceed:

The screenshot shows the 'SouthWest Direct NGL FE Lead Ordering' interface. The page title is 'SouthWest Direct NGL FE Lead Ordering'. The current user is 'KristineFE'. The page is titled 'Home::Members Home::Start New Campaign'. There are navigation links for Home, Sign Out, Account, and Shopping Cart. A warning message states: 'To maintain the integrity of your secure log-in and order criteria, please do not use your browser's Refresh, Back or Forward buttons for site navigation.' The 'Current Campaign' section shows 'Customers: KGLnFE'. The 'Step 1 of 6' section is titled 'Create New Campaign.' and includes a note: 'Please note there is a 500 piece minimum order per drop. We can also accommodate custom orders, please call us at 800.958.3798 ext 53 or 24.' The 'Name Your Campaign:' field is highlighted with a red oval. Below it is a 'Campaign Description: Enter notes for your records here.' field. A 'Next' button is visible. Another warning message is at the bottom: 'To maintain the integrity of your secure log-in and order criteria, please do not use your browser's Refresh, Back or Forward buttons for site navigation.' The browser status bar shows 'Internet (Protected Mode On)' and '100%' zoom.

Step 1 of 6: Enter in your campaign name.

- A. Each campaign name can only be used one time.
- B. Enter a brief description if you choose in the box.
- C. Once you are finished, click "next".



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Helpful Hint
 To purchase a list with phone numbers, you must have a valid SAN number. Please refer back to Registration Instructions for more information about obtaining your SAN number.
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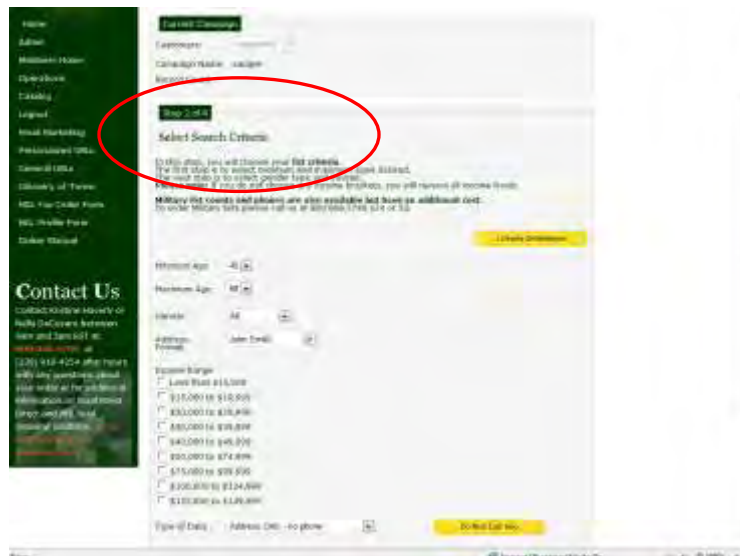
Step 2 of 6: Now, select your list type: (Upload your own or Order List)

1. **List Order** – To order a list, click this option.

A. On the next screen, you will enter in your list criteria:

1. Minimum and maximum age ender
2. Income Range
3. Type of Data
4. Zip code

Here, you can enter more than one zip code. To enter additional zip codes, click “Add another zip code.”



B. When finished entering list criteria, click “next”. Please wait while your counts are being processed.

2. **No List** – When clicking “No list”, you will be required to enter a quantity, which will be shipped directly to you. Click “next” when finished. You will proceed directly to ordering your product.

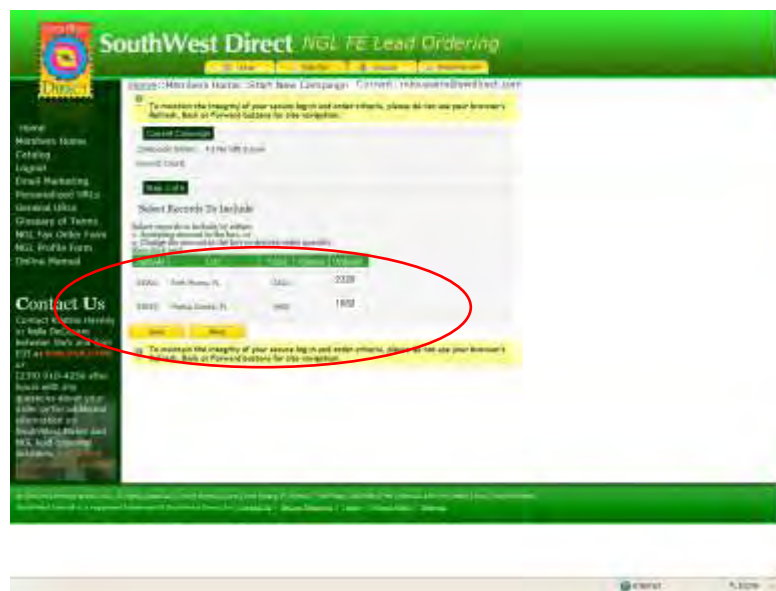
3. **Upload List** – Once you choose this option, a window will appear. To upload your own list, please click “Browse” and choose a file from your own files. When your file appears in the box, click “upload”. When file has finished uploading, click “next”. You will proceed directly to ordering your product.

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Helpful Hint

There is a 500 minimum count per drop and location.

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Step 3 of 6: Next, select records to include in your campaign. You can accept the full quantity shown, OR you can put in the quantity desired by typing your quantity in the box. When finished, click “next”.



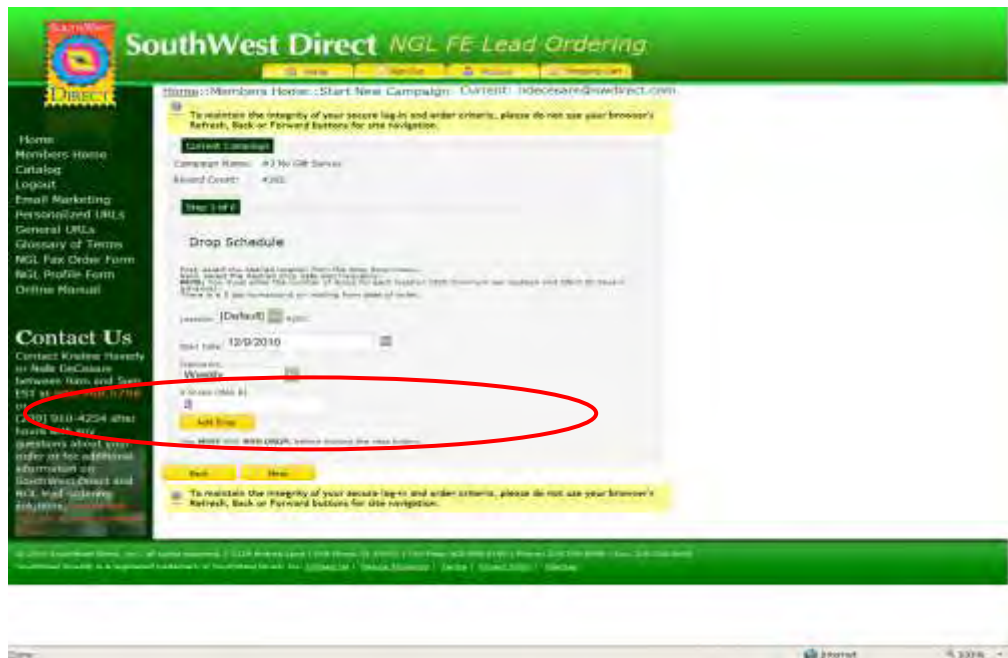
Step 4 of 6: It is now time to select your product. Select your desired product from the pull down menu.



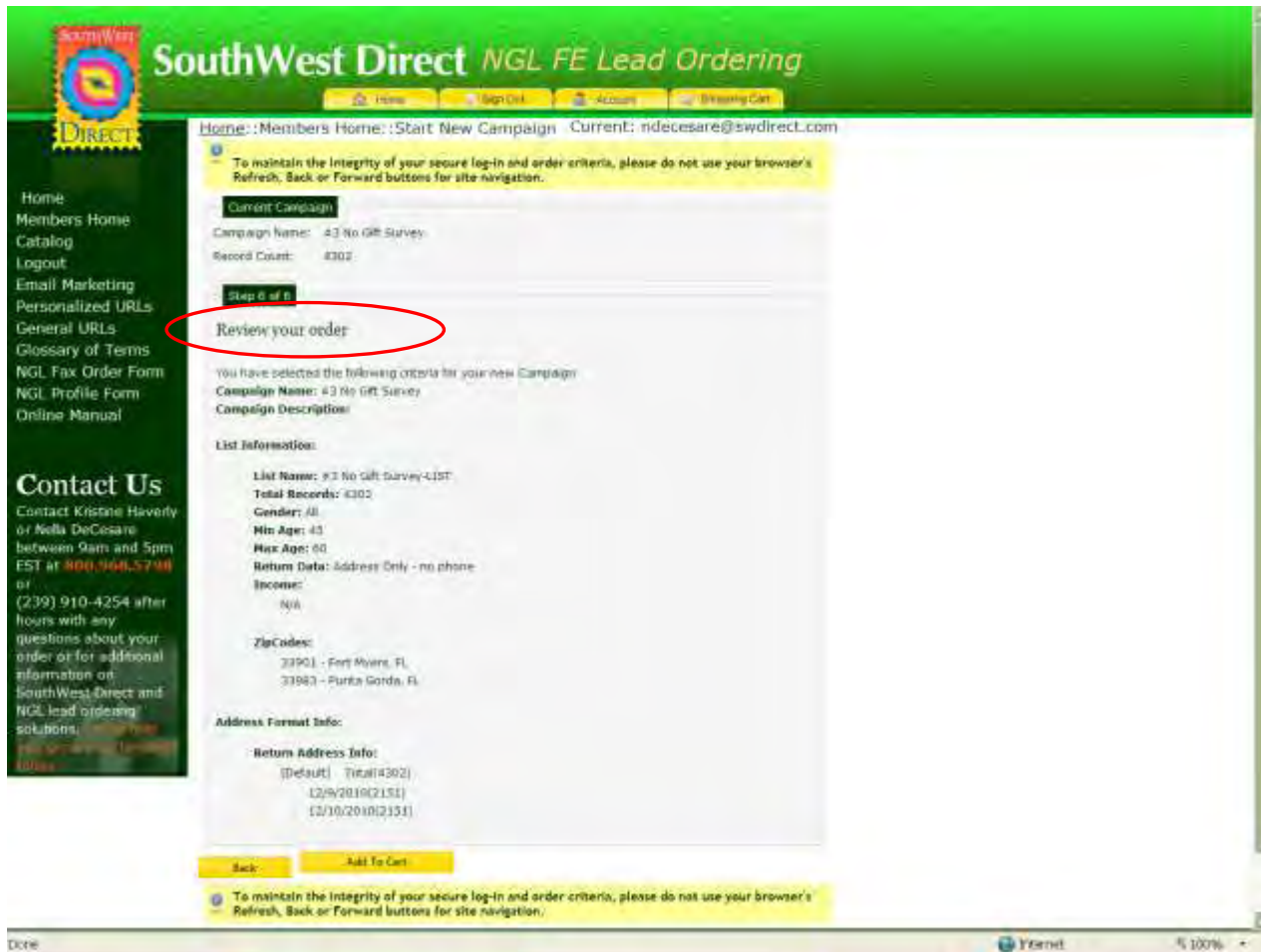
1. Choose the location you wish to have on your product. Click the use box for each location you want to include in mailing(s). Enter count you want in box next to each location you have selected.
2. Choose your permit, your logo and the count for each campaign.
3. **Please note that you must have your own permit and logo uploaded to your account information to be able to choose.** If you do not have a permit or logo uploaded, it will default to our permit (888) and no logo will appear on your product. You can upload your logo by going to the top tabs. Click on account tab and you can upload your logo or Business Reply permit information here if you have not already done so.
4. Click "View" to see your sample product with your information.
5. You will need to view a proof of your location with the product selected. After viewing you must "CHECK" the box next to the proof button to continue with your campaign. Select next to continue to the next step.

Step 5 of 6: Next, select your drop schedule.

- A. Select the desired location from the drop down menu.
- B. Select the desired drop date and frequency.
- C. You **MUST** click "**Add Drop**" before clicking the "next button."
- D. **NOTE:** You must enter the number of drops for each location (500 minimum per location). There is a 5 day turnaround on mailing from date of order.



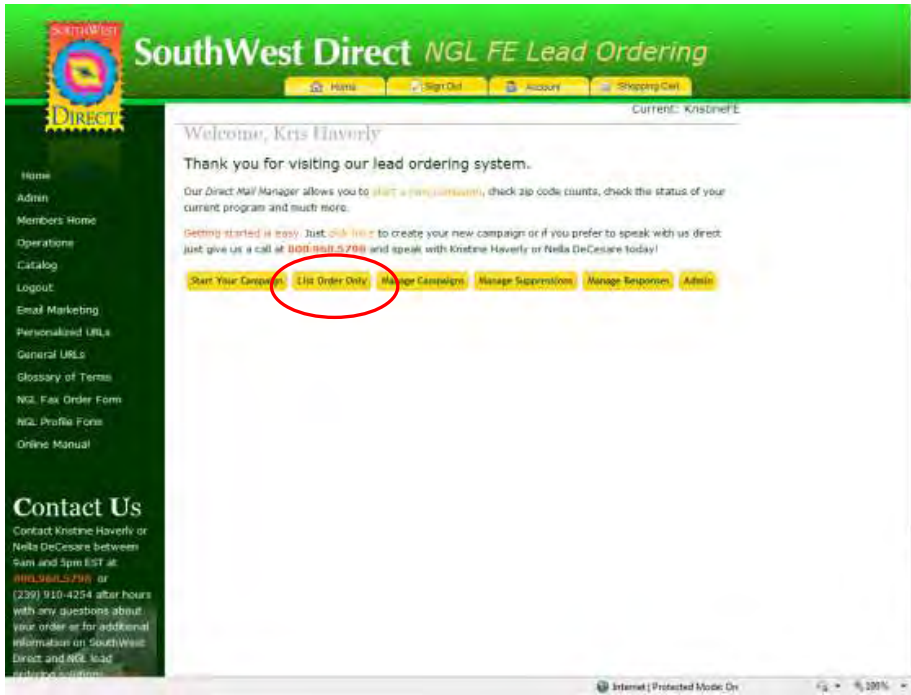
Step 6 of 6: It is now time to review the details of your order. If everything checks out, click “Add to Cart”.



- A. The next step is to FINALIZE your order. Once you click “Finalize” you will be asked to enter your payment information and click “submit” to complete order. If you do not submit payment, your order(s) will be left in your cart until you return with payment information.
- B. A new window will open up with your final order details. Click “submit payment”.
- C. You will now be asked to submit your payment information. Once information is entered, hit “submit.” Your order is now processing.

Ordering a List Only

Click “List Only” on the left sidebar navigation menu. Once you are on the first “List Only” screen, just follow these steps to proceed:



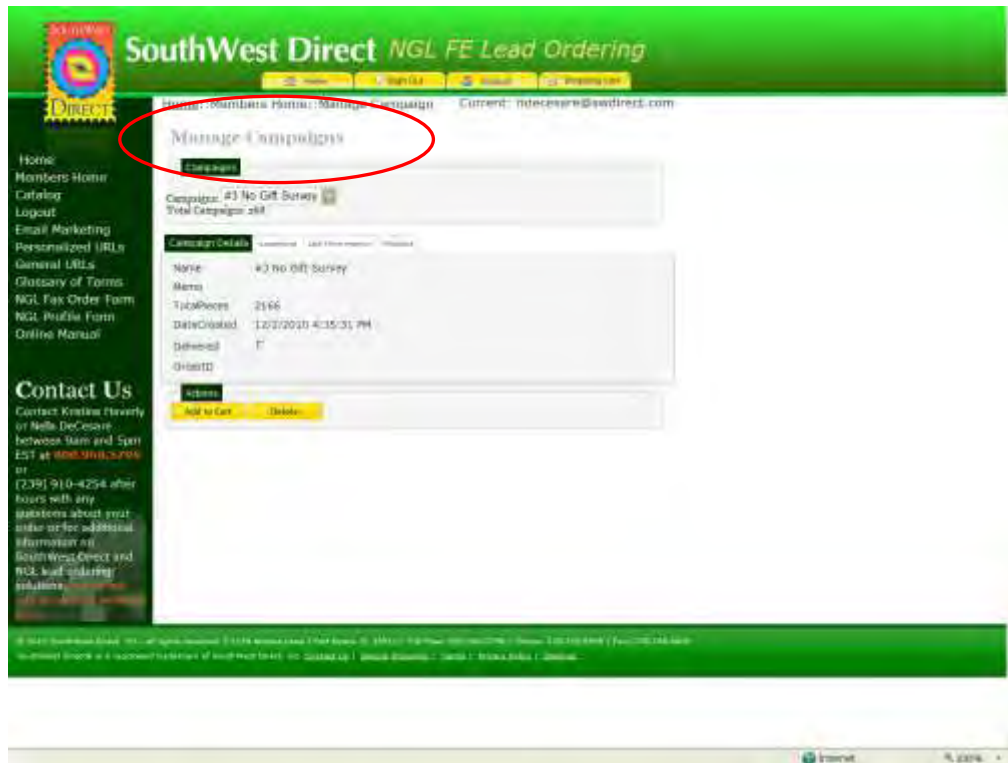
Helpful Hint

To purchase a list with phone numbers, you must have a valid SAN number. Please refer back to Registration Instructions for more information about obtaining your SAN number.

1. Enter your list criteria
 - a. Minimum and maximum age
 - b. Gender
 - c. Income Range
 - d. Type of Data
 - e. Zip code - Here, you can enter more than one zip code. To enter additional zip codes, click “Add another zip code”.
2. When finished entering list criteria, click “Get counts”. Please wait while your counts are being processed.
3. Next, select records to include in your campaign. You can accept the full quantity shown, OR you can put in the quantity desired by typing your quantity in the box
4. When finished, click “Place Order”.
5. It is now time to review the details of your order. If everything checks out, click “Add to Cart”.
6. The next step is to FINALIZE your order. Once you click “Finalize” you will be asked to enter your payment information and click “submit” to complete order. If you do not submit payment, your order(s) will be left in your cart until you return with payment information.

7. A new window will open up with your final order details. Click “submit payment”.
8. You will now be asked to submit your payment information. Once information is entered, hit “submit.” Your order is now processing.

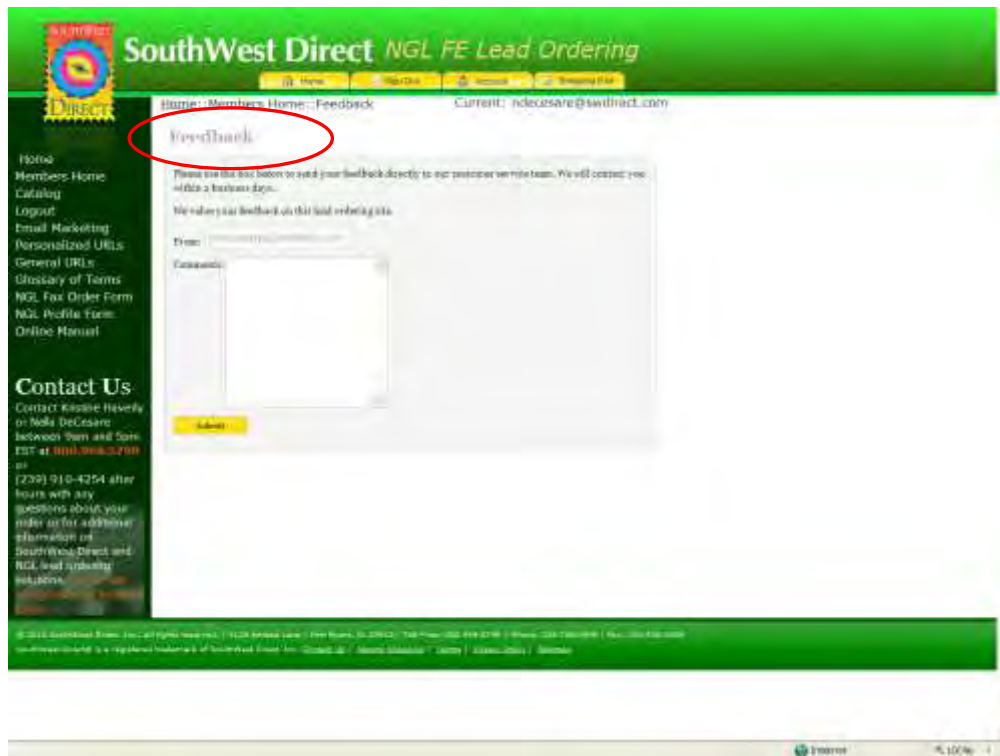
Manage Campaigns



By clicking the drop down arrow, you can see all of your campaigns by name.

1. Once you have selected the campaign you want to view, you can click to view campaign details, such as quantity, date ordered, and if the campaign has been mailed.
2. By clicking on the product, you can view the details of the product you mailed.

Feedback



1. By clicking the feedback button on left sidebar navigation menu, you can send us your comments and feedback.
2. Once you have entered your feedback, just click “submit” and we will receive your email. We will be back in touch with you within two (2) business days. Of course, if you need immediate assistance with your feedback, please call us at 800.968.5798 x53 or x24.

Reports

1. By clicking the Reports button on the left sidebar navigation menu, you can view reports of mailings you have completed, and quantities, by product or timeline.
2. You can also export the report for your records.

Responses

1. By clicking the responses button on left sidebar navigation, you can view the responses for your mailing.
2. You can also view and export responses from previous mailings.

Suppressions

1. By clicking the suppressions button on left sidebar navigation menu, you can upload a data file of names or records you want suppressed from your mailing(s).
2. Or, you can scan your suppression file.

3. You can also manually key in a suppression name or names to eliminate from your lists.

Help Center

1. By clicking the help center button on left sidebar navigation menu, you can schedule an online training session of this website
2. Once you have entered the information, just click “submit” and we will receive your email and will be back in touch with you within two business days. Of course, if you need immediate assistance with your training or questions, please call us at 800.968.5798 x53 or x24.

Other Key Information

1. SWD can also assist you in planning email campaigns; if you're interested in getting additional information on email marketing and other services we can provide you, call us at 800-968-5798 x53 or x24.
2. Personalized URL's are a great way to increase response rates and it is an online version of a response card, which is populated with recipients' name and address information. For more information on using online response with your offline campaigns, call SWD.
3. General URLs are also an online response form, but the person responding completes the form, so it does not already contain his/her name and address. This is another great tool in increasing response rates. Please call SWD for more information.
4. We have provided a glossary of terms for you on the left sidebar navigation menu.
5. There are fax order forms on this page if you prefer not to go through the online ordering process.
6. NGL profile forms are available on the left sidebar navigation menu and need to be completed prior to ordering from this site. We can register you if you would prefer. Call SWD or complete the form and fax, and we will take care of the rest.

We want to be your partner and will help you every step of the way through the process. We look forward to working with you.

800.968.5798
Kristine Haverly, ext 24
Nella DeCesare, ext 53