

# CustomPoint User Guide

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## CustomPoint - Materials Ordering

### Select one of the following topics:

[How to Place an Order](#) – The Complete Process

### Tips and Tricks

#### Ordering Portal

- [Filtering Materials](#)
- [Changing Item View](#)
- [Adding Items to Cart](#)

#### Checkout

- [Saving an Order](#)
- [Removing Items](#)

#### Changing or Adding an Address

#### Additional Order Information

- [Searching for an Order](#)
- [Tracking Information](#)
- [Reordering a Previously Placed Order](#)

CustomPoint can be accessed from your Single Sign-On portal.

### How to Place an Order – The Complete Process – [Click to return to menu](#)

- 1) From the home page, select the Market/State from the **Guided Search** dropdown.

Note: Only the state(s) and health plans you are contracted and certified to market and sell plus PDP will populate.



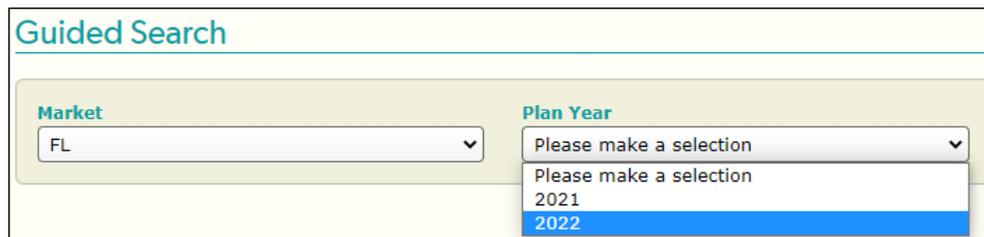
The image shows a screenshot of a web interface element titled "Guided Search". Below the title is a dropdown menu labeled "Market". The dropdown menu is currently closed and displays the text "Please make a selection" followed by a downward-pointing arrow icon. A red arrow points to the dropdown arrow icon, indicating where the user should click to open the menu.

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- 2) Select the appropriate plan year from the **Plan Year** dropdown.

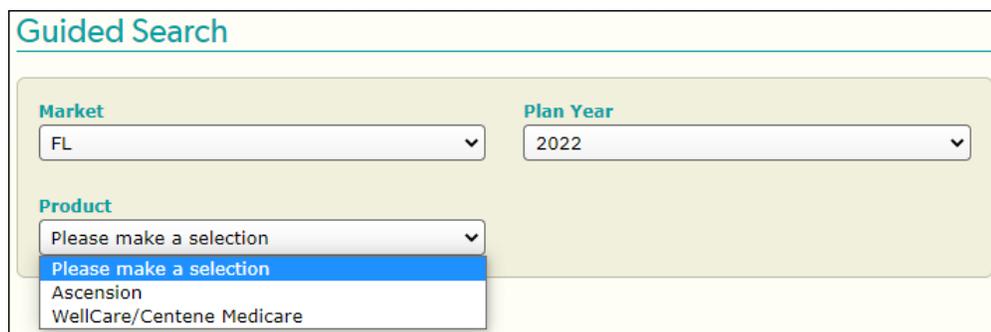
Note, if a market is available for 2022, there will be an option to order 2022 materials up until 12/31/2022. Reminder: You must complete 2023 contracting and certification training (2023 AHIP & ACT) in order to access 2023 materials.



The screenshot shows the 'Guided Search' form. The 'Market' dropdown is set to 'FL'. The 'Plan Year' dropdown is open, showing options for 'Please make a selection', '2021', and '2022'. The '2022' option is highlighted in blue.

To order PDP materials, Select **PDP** in the **Market** dropdown.

- 3) Select a product from the Product dropdown. This year we will be offering up to 3 products in CustomPoint (This is market/state-dependent).



The screenshot shows the 'Guided Search' form. The 'Market' dropdown is set to 'FL' and the 'Plan Year' dropdown is set to '2022'. The 'Product' dropdown is open, showing options for 'Please make a selection', 'Ascension', and 'WellCare/Centene Medicare'. The 'Ascension' option is highlighted in blue.

### Complete Product List:

- Wellcare Centene Medicare (includes all Allwell, Health Net, and Fidelis)
- Ascension Complete
- PDP

- 4) Once you have selected the market, plan year, and product, select **FIND**. You will be taken to the ordering portal.

**FIND**

- 5) While in the ordering portal, add materials to your cart. Please refer to **Tips and Tricks, Ordering Portal** portion of this guide for more information on the different ways to filter and add materials to your cart.

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6) Once all items are in your cart, select the **Cart** icon to proceed with check out.



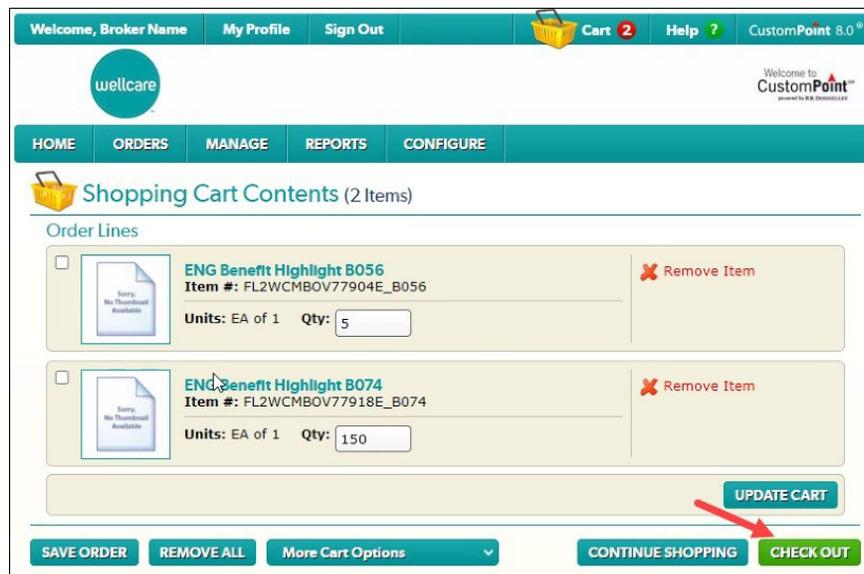
7) On the **Shopping Cart Contents** page of check out, you can do the following:

- Remove items
- Update quantities
- Save your order to complete at a later date
- Continue Shopping

(More information can be found on the **Tips and Tricks, Check-Out** portion of this guide).

When you are satisfied with the items in your cart, select the **CHECKOUT** button.

*Note: Quantity number is required for each material item in your cart in order to check out.*



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- 8) After selecting **CHECKOUT**, complete the **Delivery Options**. Here you can select a pre-populated shipping address or insert a new shipping address. After an address is selected and validated, select the **NEXT** button.

Wellcome, Broker Name My Profile Sign Out Cart 2 Help ? CustomPoint 8.0<sup>®</sup>

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HOME ORDERS MANAGE REPORTS CONFIGURE

Delivery Options Step 1 of 3

Address Source

Your Default Address

Addresses Found (1)

Broker Name

Deliver To

Broker Name Ship To Attention

Broker Name

SAVE ORDER CANCEL BACK NEXT

Please refer to the **Tips and Tricks, Check-Out** portion of this guide for more information.

- 9) On the **Order Details** screen, a phone number and email address must be input to check out. An order confirmation, along with any order updates, will be sent to the email address entered. Select **NEXT** to continue to checkout.

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Order Details Step 2 of 3

Customer Information

Name \* Phone Number \*

Broker Name 9157270556

Email Address \*

SM\_IC\_S\_Forecasting@wellcare.com

Order Information

Order Title

Purchase Order # \* DTC ORDER

GL Code \* FL WellCare/Centene Medicare

Plan Year \* 2022

Product \* WellCare/Centene Medicare

Market \* FL

SAVE ORDER CANCEL BACK NEXT

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10) If an order quantity exceeds the maximum, you will be asked for a **Routing Justification**. Please enter a note here, as the order will be forwarded to a market leader for review and approval.

Select **NEXT** to proceed to checkout.

Welcome, Ben Broker Olson My Profile Sign Out Cart 2 Help ? CustomPoint 8.0®

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HOME ORDERS

Routing Justification Step 2 of 3

Routing Details:

Line No.	Item #	Routing Reason(s)
Entire Order		1) Quantity Ordered for Item exceeds the Quantity Limit of 25 -FL1WMRRGD581245_0044 FL 2021 Resource Guide Version: 0044 SPA

Justification

Please provide a justification to support the above reason(s) \*

SAVE ORDER CANCEL BACK NEXT

11) The Order Summary provides a final opportunity to review your order before submitting.

Final Review:

- Confirm **Items Ordered** and amount
- Confirm the **Ship To:** address

After a final check is completed, select **SUBMIT ORDER**.

Welcome, Broker Name My Profile Sign Out Cart 2 Help ? CustomPoint 8.0®

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HOME ORDERS MANAGE REPORTS CONFIGURE

Order Summary Step 3 of 3

Ships To: Broker Name 3

Ship To Attention:

View or Print All Details | Show Order Detail

Items Ordered

ENG Benefit Highlight B056 Item #: FL2WCMBOV77904E_B056 Units: EA of 1 Quantity: 5
ENG Benefit Highlight B074 Item #: FL2WCMBOV77918E_B074 Units: EA of 1 Quantity: 150

SAVE ORDER CANCEL BACK SUBMIT ORDER

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- 12) After an order is submitted you will receive an order confirmation page. If your order was routed, you will receive a confirmation email once the order has been approved. Please take note of the sales reference number. This will be needed to search for an order. At this point, you can return to the Home page to place another order, or copy the same order.

The screenshot shows the 'Order Confirmed' page in the CustomPoint system. The page features a teal header with navigation links: 'Welcome, Broker Name', 'My Profile', and 'Sign Out'. On the right side of the header, there is a shopping cart icon with '0' items, a 'Help ?' link, and the text 'CustomPoint 8.0'. Below the header is a navigation bar with links for 'HOME', 'ORDERS', 'MANAGE', 'REPORTS', and 'CONFIGURE'. The main content area displays 'Order Confirmed' with a shopping cart icon. To the right, it shows 'Order Number: 34806245' and 'Sales Reference Number: 60632693'. A message states: 'Thank you. We will send a detailed email confirmation to [redacted]. Please save the above Order Numbers, they can be used to track your order in our order status module. You may also wish to [Print this Order Confirmation](#) for your records. Thank you for your business!'. At the bottom, there are two buttons: 'COPY THIS ORDER' and 'HOME'.

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## Tips and Tricks – Click to return to menu

Below are a few tips and tricks to make the ordering process a more user-friendly experience.

## Ordering Portal – Click to return to menu

This is where all of your available materials are located.

## Filtering Materials – Click to return to menu

You can filter materials by using the check box options for **A.** Media Type, **B.** Language, **C.** H/S-Code, (contract number), or **D.** Plan Name. You can type in a keyword in the search box and the items will filter down for you.

The screenshot shows the 'Order Wizard Search' interface with 360 items found. On the left, there are four filter sections: Media Type (A), Language (B), H-Code (C), and Plan Name (D). The main area displays a table of search results. Each row includes an item description, item type, order quantity, and a cart icon. The first three items have 'Sorry, No Thumbnail Available' in the description column.

Item Description	Item Type	Order Qty	Cart
CA2CNCRG075737C_0028 CHI Enrollment Guide for Contract(s): H0562122000, H0562127000, H3561002000 Plan(s): Wellcare Assist (HMO), Wellcare Plus Sapphire I (HMO), Wellcare Plus Sapphire II (HMO) County(s): Alameda, Amador, Contra Costa, Fresno, Imperial, Kern, Los Angeles, Madera, Orange, Riverside, San Bernardino, San Diego, San Francisco, Santa Clara, Stanislaus, Tulare	Enrollment guide		
CA2CNCRG076011E_0028 ENG Enrollment Guide for Contract(s): H0562122000, H0562127000, H3561002000 Plan(s): Wellcare Assist (HMO), Wellcare Plus Sapphire I (HMO), Wellcare Plus Sapphire II (HMO) County(s): Alameda, Amador, Contra Costa, Fresno, Imperial, Kern, Los Angeles, Madera, Orange, Riverside, San Bernardino, San Diego, San Francisco, Santa Clara, Stanislaus, Tulare	Enrollment guide		
CA2CNCRG076014E_0029 ENG Enrollment Guide for Contract(s): H0562079000, H0562090000 Plan(s): Wellcare No Premium Ruby (HMO) County(s): Fresno, Kern, Madera	Enrollment guide		

## Changing Item View – Click to return to menu

By default, your item view will be in an Icon View. However, you can change it into two other views, both provide a more detailed description.

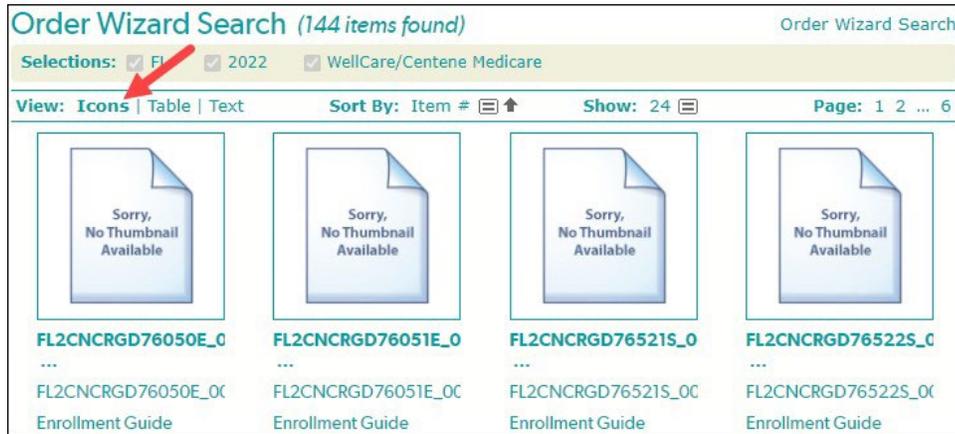
This close-up shows the search filters and view options. The 'Selections' bar includes 'FL', '2022', and 'WellCare/Centene Medicare'. Below it, the 'View' options are 'Icons', 'Table', and 'Text'. A red arrow points to the 'Text' option, which is currently selected. Other options include 'Sort By: Item #', 'Show: 24', and 'Page: 1 2 ... 6'.

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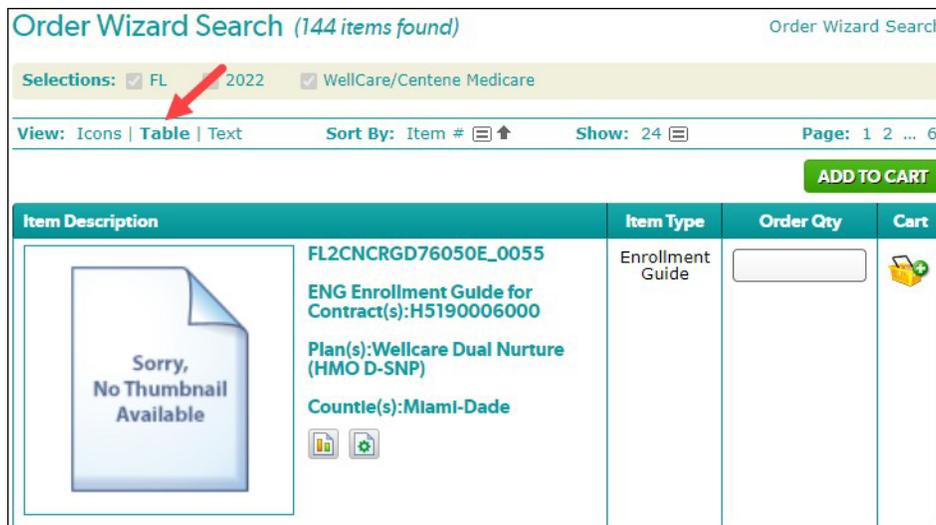
- *Icons View* – will display the Icons larger of item cover page with a short item description.



The screenshot shows the 'Order Wizard Search' interface with 144 items found. The search filters are set to 'FL', '2022', and 'WellCare/Centene Medicare'. The 'View' is set to 'Icons', and the 'Sort By' is 'Item #'. The 'Show' is set to '24' items per page, and the 'Page' is '1' of 6. The main content area displays four large icons, each with the text 'Sorry, No Thumbnail Available'. Below each icon is the item ID and the title 'Enrollment Guide'.

Item ID	Title
FL2CNCRGD76050E_0	Enrollment Guide
FL2CNCRGD76051E_0	Enrollment Guide
FL2CNCRGD76521S_0	Enrollment Guide
FL2CNCRGD76522S_0	Enrollment Guide

- *Table View* – will display a smaller Icon of item cover page, with a longer item description.



The screenshot shows the 'Order Wizard Search' interface with 144 items found. The search filters are set to 'FL', '2022', and 'WellCare/Centene Medicare'. The 'View' is set to 'Table', and the 'Sort By' is 'Item #'. The 'Show' is set to '24' items per page, and the 'Page' is '1' of 6. The main content area displays a table with one row of item details. The table has columns for 'Item Description', 'Item Type', 'Order Qty', and 'Cart'. The 'Item Description' column contains a smaller icon with the text 'Sorry, No Thumbnail Available' and a detailed description of the enrollment guide. The 'Item Type' is 'Enrollment Guide', and the 'Cart' column has an 'ADD TO CART' button.

Item Description	Item Type	Order Qty	Cart
 FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade	Enrollment Guide		<input type="text"/> 

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- *Text View* – Will only display the longer item description.

Order Wizard Search (144 items found)			Order Wizard Search
Selections: <input checked="" type="checkbox"/> FL <input checked="" type="checkbox"/> 2022 <input checked="" type="checkbox"/> WellCare/Centene Medicare			
View: Icons   Table   <b>Text</b>			Sort By: Item #  ↑
Show: 24			Page: 1 2 ... 6
Item Description	Item Type	Cart	
FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade	Enrollment Guide		
FL2CNCRGD76051E_0056 ENG Enrollment Guide for Contract(s):H5190005000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Broward, Duval, Hillsborough, Orange, Osceola, Palm Beach, Pasco, Pinellas, Polk, Seminole, Volusia	Enrollment Guide		

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## Adding Items to Cart – Click to return to menu

There are 3 ways to add an item to your cart, “order quantity”, “hover over” and “icon” method.

- *Order Quantity Method* - to add materials using “quantity” method, select **Table** view.
  - In the Order Qty bar, type the quantity of materials desired. If ordering multiple materials, input the quantity for each.
  - Select **ADD TO CART** button.



Order Wizard Search (144 items found) Order Wizard Search

Selections:  FL  2022  WellCare/Centene Medicare

View: Icons | **Table** | Text Sort By: Item # Show: 24 Page: 1 2 ... 6

**2** ADD TO CART

Item Description	Item Type	Order Qty	Cart
 FL2CNCRGD76050E_0055 ENG Enrollment Guide for Contract(s):H5190006000 Plan(s):Wellcare Dual Nurture (HMO D-SNP) Countie(s):Miami-Dade  	Enrollme Guide <b>1</b>	1	

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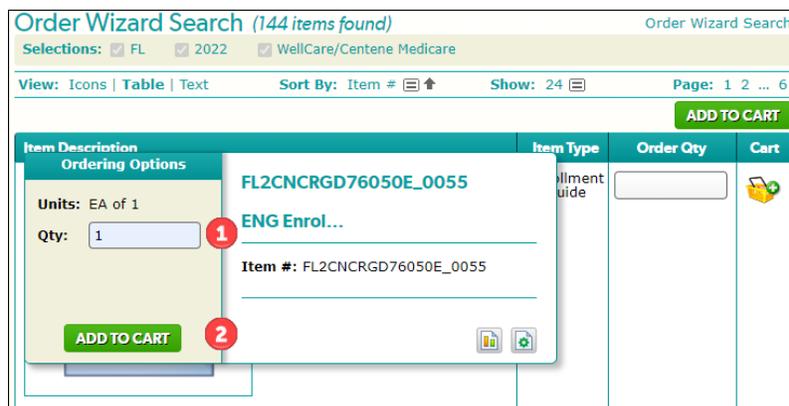
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- *Hover Over Method* – to add materials using the “hover” method, hover your mouse icon over the item description in any view.
  - Once the pop-out appears insert the quantity of materials desired.
  - Select **ADD TO CART**.

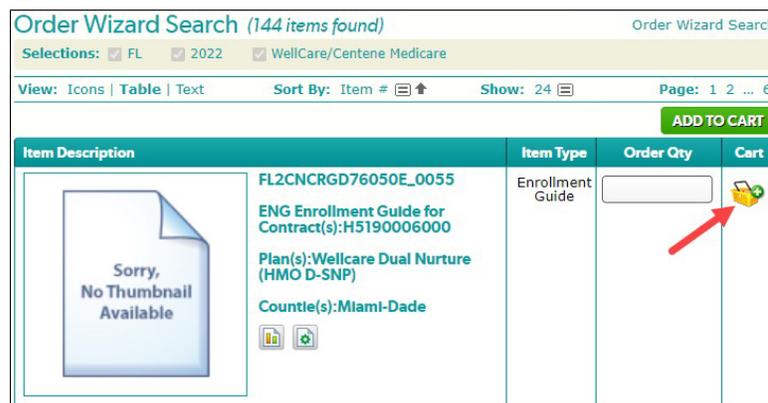
**This is not the preferred method.**

*Note: Quantity number is required to add material to cart.*



- *Icon Method* – This method is only available in the table and text view.
  - Select the **Order** icon. This will add the material to your cart. You will not be able to define the quantity of the material until the check-out process.

**This is NOT the preferred method.**



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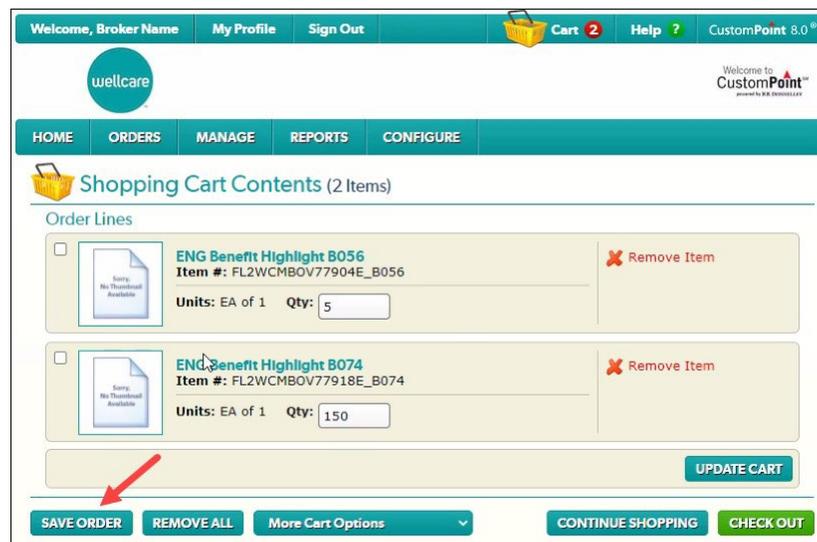
## Checkout – [Click to return to menu](#)

The below instructions pertain to the five screens related to making changes to an order.

### Saving an Order – [Click to return to menu](#)

Throughout the checkout process, there will be a Save Order button located at the bottom left corner of the page. This allows you to save your order and resume the order at a later time.

- 1) To save an order, select the **SAVE ORDER** button.



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- 2) Assign an **Order Name** and select **SAVE**.

Welcome, Broker Name | My Profile | Sign Out | Cart 5 | Help ? | CustomPoint 8.0<sup>®</sup>

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HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

### Saved Order Details

Order Name: \*  
FL Order Number 1 | SAVE | Ship To Address: Not Yet Provided

No.	Item Description	Item #	Units	Qty Ordered
1	ENG enrollment Guide Book 0074	FL2WLRRGD76074E_0074	EA of 1	0
2	ENG enrollment Guide Book 0056	FL2CNCRGD76051E_0056	EA of 1	0
3	SPA enrollment Guide Book 0056	FL2CNCRGD76522S_0056	EA of 1	0
4	ENG Benefit Highlight B056	FL2WCMBOV77904E_B056	EA of 1	0
5	ENG Benefit Highlight B074	FL2WCMBOV77918E_B074	EA of 1	0

CANCEL

- 3) To access the saved order, select the **Saved Orders** link on the home page.

Welcome, 2022 TEST | My Profile | Sign Out | Cart 0 | Help ? | CustomPoint 8.0<sup>®</sup>

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HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

## Welcome

Centene Enrollment Guides Announcement 07/29/2021  
Centene Enrollment Guides ordered after 7/27/21  
Your orders may show canceled These are really in process;  
For tracking inquiries regarding Centene Enrollment Guides ordered after 7/27/21 please contact CCS\_PreOrders

2022 Plan Year  
Important Notes:  
Pre-Ordering for the markets will begin July 22nd, 2021 and end July 29th, 2021. CustomPoint will not re-open for the markets until October 4th, 2021.  
Broker ordering will open up on August 30th, 2021. Brokers MUST BE active certified and ready to sell for 2022 PY in order to get access to 2022 materials.  
2022 materials can only be ordered through CustomPoint. If you need further assistance with placing your order, please call Broker Support at 1-866-822-1339.  
CustomPoint will offer product materials for the following 2022 health plans. Note: Health Plan availability may differ by market.  
WellCare Centene (Includes: AllWell, HealthNet, and Fidelis)  
Ascension  
PDP

**User Guide for 2021 AEP**  
WellCare CustomPoint User Guide for 2021 AEP

**Helpful Documents**  
Important reference documents found here:  
[User Guide](#)  
Frequently Asked Questions and answers found here:  
[2021 CustomPoint FAQ](#)

**Order Reminders**  
Here are your saved or pending orders awaiting completion:  
[Saved Orders \(1\)](#) | [Pending Orders \(55\)](#)

- 4) Select the **Continue Order** icon.

Welcome, 2022 TEST | My Profile | Sign Out | Cart 0 | Help ? | CustomPoint 8.0<sup>®</sup>

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HOME | ORDERS | MANAGE | REPORTS | CONFIGURE

### Saved Orders

Order Name	Date and Time	Saved By	Items	Continue Order
System Saved - 07/30/2021 02:34 PM	07/30/2021 02:34 PM	System	8	

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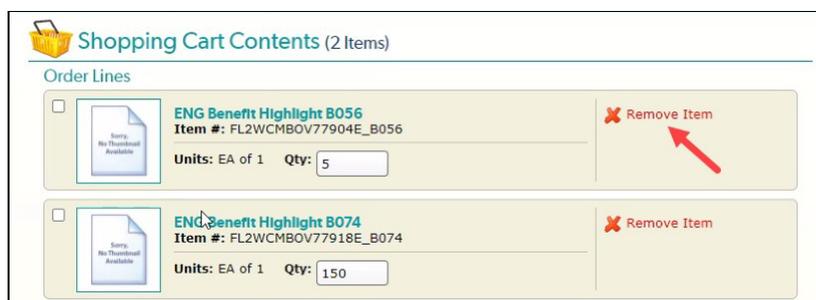
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5) You will then be re-directed to the shopping cart content page.

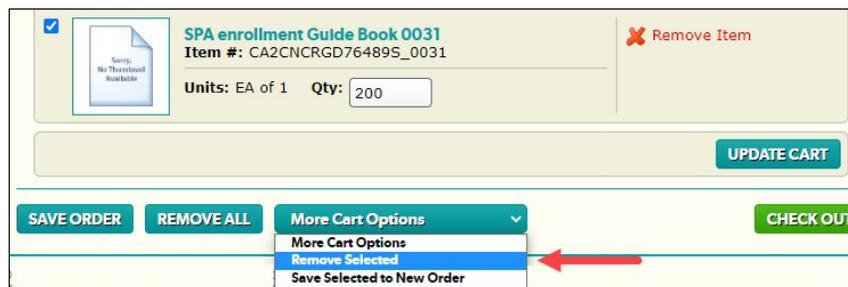
## Removing Items – Click to return to menu

To remove an item you can click on the Remove Item icon (will remove one item at a time) or select the check boxes (removes multiple items).

- *Remove Item Icon* –Select the **Remove Item** Icon to remove one item at a time.



- *Check Box Removal* –Select the check box for the items you want to remove, then go to More Cart Options at the bottom and select **Remove Selected**.



## Changing or Adding an Address – Click to return to menu

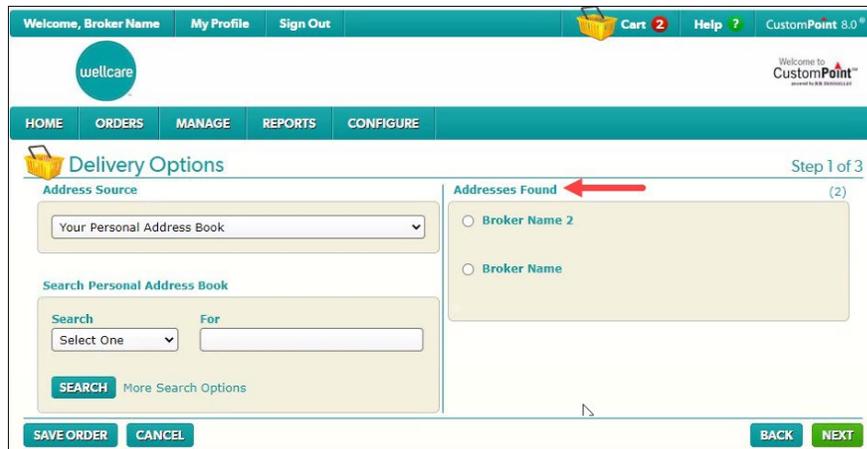
In CustomPoint, your location will have a prepopulated address if provided by the market. However, you also have the ability to change or add an address to a location. This allows you to ship the order directly to the desired location.

*Note: Materials cannot be delivered to a P.O. Box.*

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- *Selecting a prepopulated address*- any prepopulated addresses will be shown under the address found section. You can select one from your options and select next. Any address added to your address book will populate here too.



- *Adding a new Address* - To add a new address on the Address Source dropdown select **Manually Enter Address**. Populate the new address, select the **“Add to Address Book”** check box and then Validate.



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## Additional Order Information – [Click to return to menu](#)

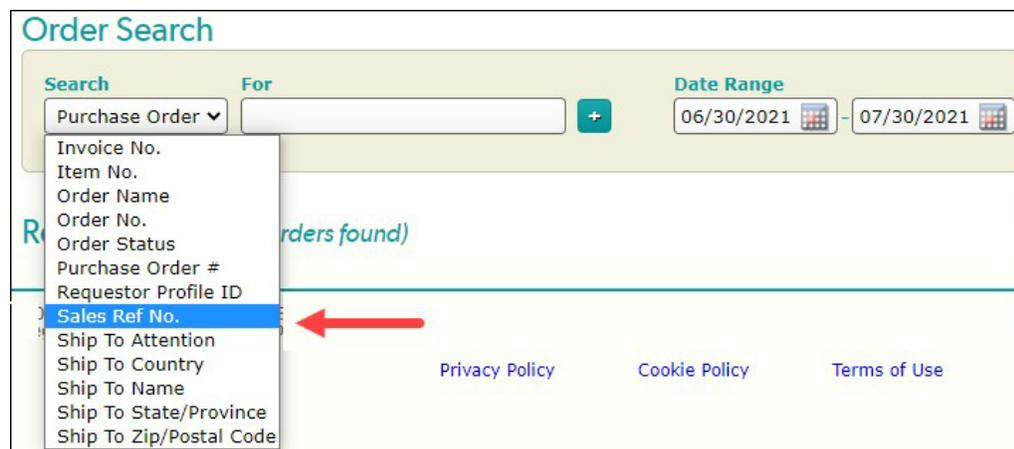
After an order has been approved, it begins the shipping process. You can see the status of your order as well as shipping information.

## Searching for an Order – [Click to return to menu](#)

1. Select **ORDERS**, then **Order Search**.



2. Update the Search dropdown to Sales Ref No (1).



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3. Type in the Sales Reference Number provided during check out or on the confirmation email (2). (Any denied orders will not show up here.)

**Order Search**

Search **1** For **2** Date Range 07/05/2021 - 08/04/2021 Scope My Orders **SEARCH**

Sales Ref No. 60632693

4. If it has been over 30 days since the order was approved, update the date range to include the order approval date (3).

**Order Search**

Search **1** For **2** Date Range **3** 07/05/2021 - 08/04/2021 Scope My Orders **SEARCH**

Sales Ref No. 60632693

5. Select **SEARCH** and the order will populate under the searched order (4).

**Order Search**

Search **1** For **2** Date Range **3** 07/05/2021 - 08/04/2021 Scope My Orders **4** **SEARCH**

Sales Ref No. 60632693

**Recent Orders (2 orders found)**

Columns: Custom Columns(2) Sort By: Order Date Show: 10 Page: 1

Sales Ref No.	Order Date	Order Name	Order Status	Item No.
60632693	08/04/2021		Mixed	
60542713	07/20/2021		System Denied Order	

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## Tracking information – Click to return to menu

Once your order has shipped, tracking information will be in CustomPoint. To find tracking information, locate your order and follow the below steps.

1. Select the **Sales Ref No.** under Searched Orders.

Order Search

Search For: Sales Ref No. 60632693 Date Range: 07/05/2021 - 08/04/2021 Scope: My Orders SEARCH

Searched Orders (1 order found) Back to Recent

Sales Ref No.	Order Date	Order Name	Order Status	Item No.
60632693	08/04/2021		Mixed	

2. On the Order Detail Page, you can see the status of your order (C) as well as tracking information at the bottom (D)

Order Details for Sales Reference No. 60192787

Order Information: Order Status: Invoiced, Order No.: 29495248, Sales Reference No.: 60192787, Order Name: Houston, TX W2 Office, WellCare, Purchase Order #: 60192787, Order Date: 05/18/2021

Billing Information: Total Sale, Order and Line Charges, Sales Tax, Bill Method: Invoice Your Account

Customer and Address Information: Originator, Phone No., Email, Ship Date: 05/19/2021, Ship To

Routing Details

No.	Result	Item #	Queue Date	Routing Reasons	Approval Date
1	Line Approved	TX1WCMBOV59527E_B131	05/18/2021	- Quantity ordered exceeds the quantity limit.	05/18/2021
1	Line Approved	TX1WCMBOV59781S_B131	05/18/2021	- Quantity ordered exceeds the quantity limit.	05/18/2021

Items Ordered

Line No.	Item Description	Item #	Status	Unit	Qty	Shipped	Price
0001	TX BH VB131 ENG	TX1WCMBOV59427E_B131	Invoiced	EA/1	300	300	
0002	TX BH VB131 SPA	TX1WCMBOV59781S_B131	Invoiced	EA/1	200	200	

Shipping and Tracking Information

Ship No.	Warehouse	Ship Date	Price	Status	Carrier/Service	Tracking No.
0001	AUSTELL DIST CTR	05/19/2021	\$261.86	Invoiced	UPS / GROUND SERVICE	1Z1AW6330340913666

A. Order Information

B. Shipping Information

C. Status of order by line item

D. Tracking information - You can select the tracking number and it will redirect you to the Carrier Website

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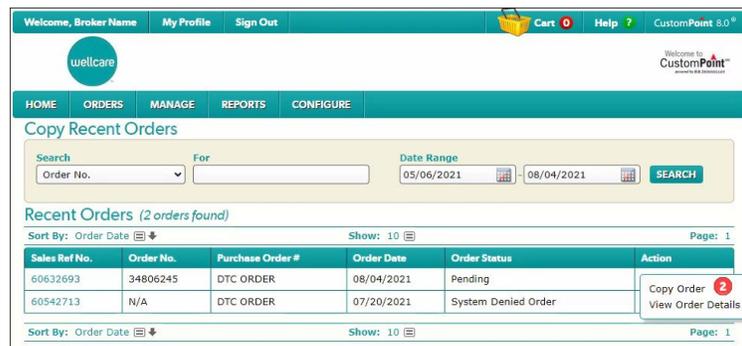
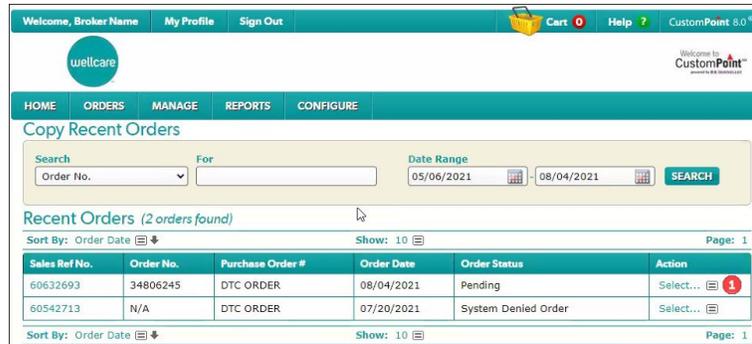
## Re-Ordering a Previously Placed Order – Click to return to menu

CustomPoint has the ability to copy a previously placed order. To copy a previously placed order follow the below steps.

1. On the home page, select **ORDERS** and then **Copy Recent Orders**.



2. Under the Action column select **Copy Order** for the order, you'd like to copy.



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- The order will then be placed in your cart with the same items and quantities.

The screenshot displays the CustomPoint 8.0 Shopping Cart interface. At the top, there is a navigation bar with links for 'Welcome, Broker Name', 'My Profile', and 'Sign Out'. A shopping cart icon shows 'Cart 2' items, and a 'Help ?' link is present. The 'CustomPoint 8.0' logo is in the top right corner. Below the navigation bar is a menu with 'HOME', 'ORDERS', 'MANAGE', 'REPORTS', and 'CONFIGURE'. The main content area is titled 'Shopping Cart Contents (2 Items)'. Under 'Order Lines', there are two items listed:

Item	Item #	Units	EA of 1	Qty	Action
ENG Benefit Highlight B056	FL2WCMBOV77904E_B056	EA of 1		5	Remove Item
ENG Benefit Highlight B074	FL2WCMBOV77918E_B074	EA of 1		150	Remove Item

At the bottom of the cart area, there is an 'UPDATE CART' button. Below the cart area, there are buttons for 'SAVE ORDER', 'REMOVE ALL', and 'More Cart Options' (with a dropdown arrow). On the right side, there are buttons for 'CONTINUE SHOPPING' and 'CHECK OUT'.