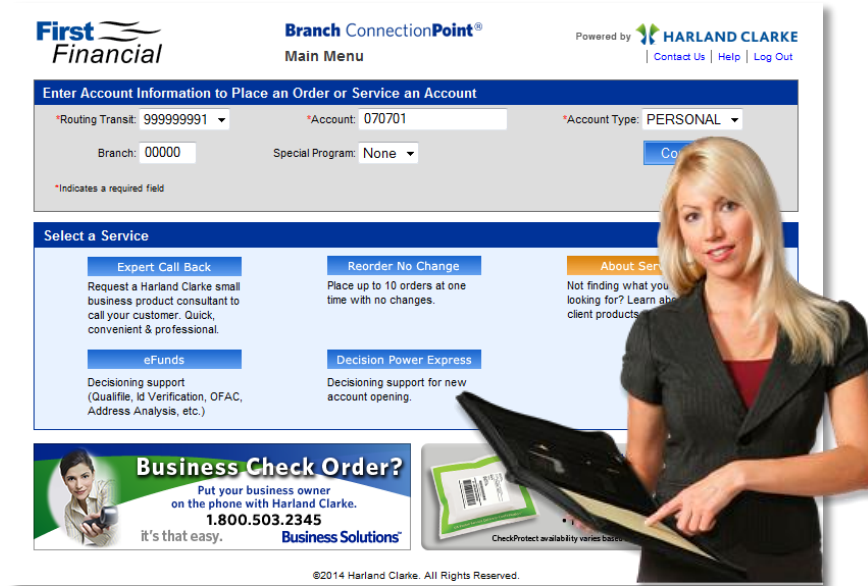


## Branch ConnectionPoint® Quick Reference Guide

Follow the steps below to perform the basic ordering functions using Harland Clarke's Internet Check Ordering program. If you need assistance, please contact Harland Clarke Technical Service for assistance at 1-800-643-5737.

### Getting Started

1. When the Branch application is accessed, the system displays the Main Menu.
2. To place an order or service an account, enter the Routing Transit, Account Number, Branch Number, and Special Program, if applicable, in the [Account Information Panel](#).
3. To perform other functions, select an option in the [Select a Service](#) panel.
4. To end your internet session, select the Log Out link.



### If History Exists

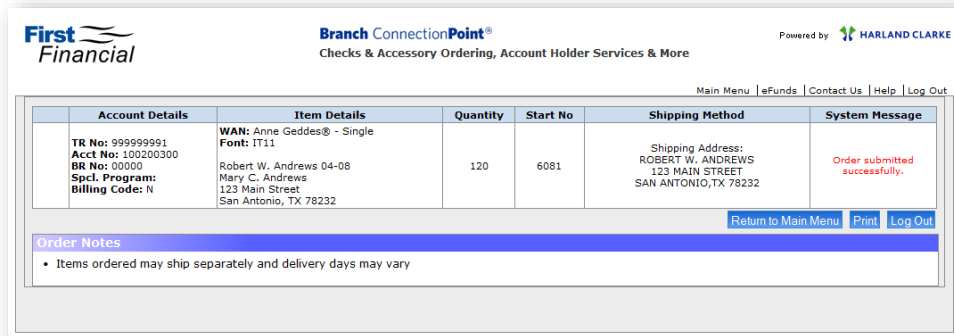
1. You can perform a reorder with changes on the Express Order page.
2. You can perform a Reorder No Change if no changes are needed. (See Reorder No Change).

### If No History Exists

1. You must place a New Order. (See New Order for details).

### Reorder No Change

1. In the Select a Service panel on the Main Menu, select the [Reorder No Change](#) button.
2. Select a Routing Transit number, enter up to 10 account numbers, and click Continue.
3. Review each order, make changes to the Quantity and/or check Start Number.
4. Review orders with **red System Messages**. Select the **Remove** link to remove an order.
5. Select the [Submit Orders](#) button. The message "Order Submitted Successfully" will display for each order.
6. Select the Return to Main Menu button or link to return to the Main Menu.
7. Select the Log Out button or link to Log Out.



Account Details	Item Details	Quantity	Start No	Shipping Method	System Message
<b>TR No:</b> 999999991 <b>Acct No:</b> 100200300 <b>BR No:</b> 00000 <b>Spec. Program:</b> <b>Billing Code:</b> N	<b>WAN:</b> Anne Geddes® - Single <b>Font:</b> IT11 Robert W. Andrews 04-08 Mary C. Andrews 123 Main Street San Antonio, TX 78232	120	6081	Shipping Address: ROBERT W. ANDREWS 123 MAIN STREET SAN ANTONIO, TX 78232	<b>Order submitted successfully.</b>

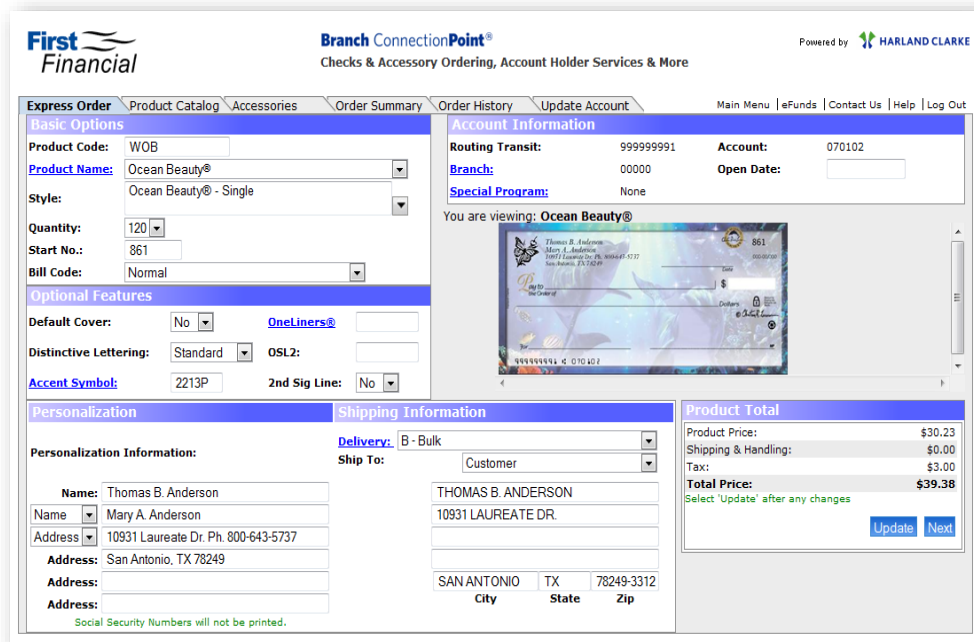
[Return to Main Menu](#) [Print](#) [Log Out](#)

**Order Notes**

- Items ordered may ship separately and delivery days may vary

## Reorder with Change

1. After entering the client's account number information and Account Type in the Account Information panel on the Main Menu, select the [Continue](#) button.
2. On the Express Order page, make changes to the Basic Options, Optional Features, Personalization, and Shipping Information panels. Note: The check starting number automatically advances to reflect the next sequence.
3. Select the [Update](#) button to update the product and pricing information. Then select the [Next](#) button.
4. Review the order details on the Order Summary page. Select the [Edit](#) link to make changes. Select the [Remove](#) link to remove item(s) from the order.
5. If the order is shipping via a Trackable delivery method, enter the account holder's e-mail address in the Order Confirmation panel. A shipping notification email will be sent to your account holder when the order ships.
6. To add a related product, select the Order button in the Related Products panel or choose a product from the Accessories page. Edit the related product, select Update, and Next to return to the Order Summary page.
7. Verify all information is complete and accurate. Select the [Submit Order](#) button to place your order.
8. Select the Return to Main menu button or link, or the Log Out button to log out of the web site.




## New 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 in 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 <sup>nd</sup> Sig Line
Personalization	Name and Address information
Shipping Information	Shipping Address, Delivery Method, and Ship To

3. The Bill Code field will default to "Normal." Select another Bill Code from the drop-down. Note: If the order includes a Special Program code that handles billing, leave the Bill Code as "Normal."
4. In the Shipping Information panel, click the Delivery hyperlink to view Delivery Help information.
5. The Account Information panel will display the account holder's account information. To change the Branch number, click the Branch link. To modify the Special Program code, click the Special Program link.
6. The Product Total panel will display pricing for the order. Select the [Update](#) button after any changes. Then, select the [Next](#) button.
7. Review the order details on the Order Summary page. Select the [Edit](#) link to make changes. Select the [Remove](#) link to remove item(s) from the order.

8. If the order is shipping via a Trackable delivery method, enter the account holder's e-mail address in the Order Confirmation panel. A shipping notification email will be sent to the account holder when the order ships.
9. To add a related product, select the Order button in the Related Products panel or choose a product from the Accessories page. Edit the Related Product, select Update, and Next to return to the Order Summary page.
10. Verify all information is complete and accurate. Select the **Submit Order** button to place your order.
11. Select 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.



**Branch ConnectionPoint®**  
Checks & Accessory Ordering, Account Holder Services & More

Powered by  **HARLAND CLARKE**

Express Order | Product Catalog | Accessories | Order Summary | Order History | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out


**If you need assistance, please call Harland Clarke Business Solutions at 1-800-503-2345.**

**Basic Options**  
Product Code: AHBL  
Product Name: Three-To-A-Page General Purpose AH Checks  
Style: Three-To-A-Page AH Classic Safety Blue Single Part Checks  
Quantity: 504  
Start No.: 1001  
Bill Code: Normal  
Deposit Tickets: DT3 - 3tp deposits image  
Quantity: 120

**Optional Features**  
Endorsement Stamp: No  
OSL1:  
Distinctive Lettering: Industrial  
OSL2:  
Logo: 1047C  
2nd Sig Line: No  
Default Cover: No

**Account Information**  
Routing Transit: 999999991  
Branch: 00000  
Special Program: None  
Account: 70306  
Open Date:


You are viewing: **Three-To-A-Page General Purpose AH Checks**




**Personalization**  
Personalization Information:  
Name: Andrews Construction  
Address: 10931 Laureate Dr. Ph. 800-643-5737  
Address: San Antonio, TX 78249  
Address:  
Address:  
Address:

**Shipping Information**  
Delivery: Y - Ground Service, Bill Consumer  
Ship To: Customer  
ANDREWS CONSTRUCTION  
10931 LAUREATE DR.  
SAN ANTONIO TX 78249-3312  
City State Zip

**Product Total**  
Product Price: \$96.05  
Shipping & Handling: \$20.69  
Tax: \$9.62  
**Total Price: \$126.36**  
Select 'Update' after any changes  
Update Next



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Express Order | Product Catalog | Accessories | Order Summary | Order History | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out

**Order Summary**  
Routing Transit # 999999991 - Account# 70306

[Submit Order](#)


	Item Details	Item Price	Shipping Method	Shipping & Handling	Quantity	Price
EDIT REMOVE	<b>Commercial Check:</b> Three-To-A-Page AH Classic Safety Blue Single Part Checks <b>Font:</b> Industrial <b>Image:</b> Masonry - 1047C <b>Personalization:</b> Andrews Construction 10931 Laureate Dr. Ph. 800-643-5737 San Antonio, TX 78249	\$96.05	Ground Service, Bill Consumer Estimated Delivery 04/30/2014 Shipping Address: ANDREWS CONSTRUCTION 10931 LAUREATE DR. SAN ANTONIO, TX 78249-3312	\$20.69	504	\$116.74
Subtotal: \$116.74 Tax: \$9.62 <b>Total Price: \$126.36</b>						


**Order Confirmation**  
Email Address (optional):  
Please retype for accuracy:  
For added security, provide your account holder's email address and they will receive a shipping confirmation email. Select a trackable delivery method (we recommend CheckProtect®) to track the order online.  
☐ Send reorder reminders and news about products and services


**Order Notes**


- The total price shown will be automatically deducted from your account within 14 days.
- Items ordered will ship separately and delivery days may vary.

**Related Products**


The Colleague™  
Order

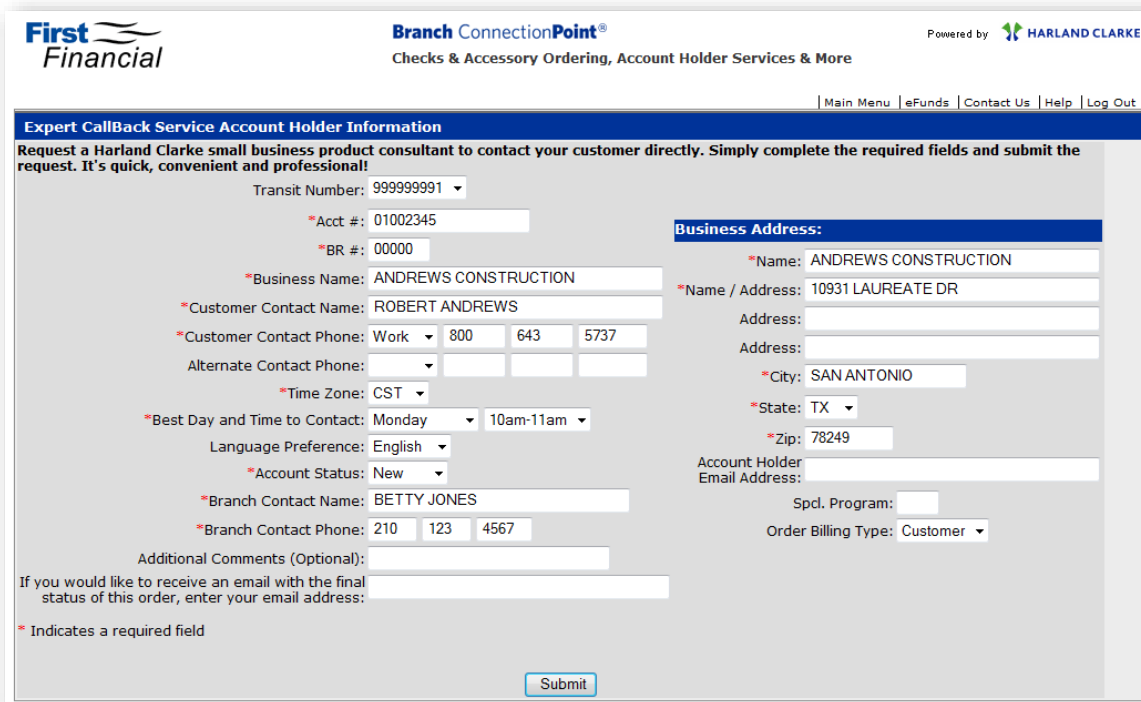

DT3 Three-To-A-Page Deposit Tickets  
Order


Laser 401 Voucher Checks with Lines  
Order


7-Ring Register  
Order

## Expert Call Back

1. You can refer your business account holder to the small business product consultant at Harland Clarke Business Solutions. The product consultant will contact your account holder and assist with placing their business order.
2. From the Select a Service panel on the Main Menu, select the [Expert Call Back](#) button.
3. The Expert CallBack Service Account Holder Information page will load. Required fields are indicated with a **red** asterisk.
4. Select a Routing Transit number, enter the account number, and Branch number.
5. Enter the Business Name, Customer Contact Name and Contact Phone number.
6. Select the account holder's Time Zone from the drop-down.
7. Select the Best Day and Time of Day to contact the account holder from the drop-down lists.
8. Language preference will default to "English." Select an option from the drop-down.
9. The Account Status field will default to "New." If this is an existing account, select "Existing" from the drop-down.
10. Enter your name and phone number in the Branch Contact and Branch Contact Phone fields.
11. Enter "Additional Comments" you feel would be beneficial to the product consultant.
12. Enter your email address if you would like a final status on the order.
13. In the Business Address fields, enter the account holder's name and address information.
14. If the order includes a Special Program, enter the code in the Spcl. Program field.
15. The Order Billing Type field will default to "Customer." If applicable, select "Institution" from the drop-down.
16. Review the information you've entered. Select the [Submit Order](#) button to submit your request.



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Checks & Accessory Ordering, Account Holder Services & More

| Main Menu | eFunds | Contact Us | Help | Log Out

### Expert CallBack Service Account Holder Information

Request a Harland Clarke small business product consultant to contact your customer directly. Simply complete the required fields and submit the request. It's quick, convenient and professional!

Transit Number: 999999991

\*Acct #: 01002345

\*BR #: 00000

\*Business Name: ANDREWS CONSTRUCTION

\*Customer Contact Name: ROBERT ANDREWS

\*Customer Contact Phone: Work 800 643 5737

Alternate Contact Phone:

\*Time Zone: CST

\*Best Day and Time to Contact: Monday 10am-11am

Language Preference: English

\*Account Status: New

\*Branch Contact Name: BETTY JONES

\*Branch Contact Phone: 210 123 4567

Additional Comments (Optional):

If you would like to receive an email with the final status of this order, enter your email address:

\* Indicates a required field

**Business Address:**

\*Name: ANDREWS CONSTRUCTION

\*Name / Address: 10931 LAUREATE DR

Address:

Address:

\*City: SAN ANTONIO

\*State: TX

\*Zip: 78249

Account Holder Email Address:

Spcl. Program:

Order Billing Type: Customer

[Submit](#)

## Reprints

1. After entering the account holder's information in the Account Information panel on the Main Menu, the Express Order page will load.
2. Review the details of the order, make the necessary changes, and re-submit the order to Harland Clarke.
3. From the Bill Code drop-down, choose "Reprint-Delayed in Delivery" or "Reprint-Error."
4. Select the Update button, then the Next button.
5. Review the order details on the Order Summary page.
6. Verify all the information is complete and accurate. Select the Submit Order button to place your order.
7. Select the Return to Main Menu button or link, or the Log Out button/link to exit the web site.

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Express Order | Product Catalog | Accessories | Order Summary | Order History | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out

**Basic Options**

Product Code: WDAN

Product Name: Anne Geddes®

Style: Anne Geddes® - Duplicate

Quantity: 120

Start No.: 6441

Bill Code: Reprint - Error

**Optional Features**

Default Cover: No ☐ **OneLiners®**

Distinctive Lettering: Standard ☐ **OSL2:**

Accent Symbol: ☐ **2nd Sig Line:** No ☐

**Personalization**

Personalization Information:

Name: Robert W. Andrews 04-08

Name: Mary C. Andrews

Address: 123 Main Street

Address: San Antonio, TX 78232

Address:

Address:

Social Security Numbers will not be printed.

**Shipping Information**

Delivery: B - Bulk

Ship To: Customer

ROBERT W. ANDREWS

123 MAIN STREET

SAN ANTONIO TX 78232

City State Zip


**Account Information**

Routing Transit: 999999991 Account: 100200300

Branch: 00000 Open Date: 04-08

Special Program: None

You are viewing: Anne Geddes®



**Product Total**

Product Price: \$0.00

Shipping & Handling: \$0.00

Tax: \$0.00

**Total Price: \$0.00**

Select 'Update' after any changes

[Update](#) [Next](#)

## Order History

- After entering the account holder's information in the Account Information panel on the Main Menu, the Express Page loads.
- Select the **Order History** tab.
- The Order History panel will display the order records for your account holder. Each order record will display the Order Entry date, Product Code, Description, and Status.
- The Order Details panel will display details for the chosen order record.
  - Select the **Reorder** button to place a reorder. The Express Order page will load.
  - Select the **Update Order** button to make changes to an "In Process" order. If the Update Order button is **not** visible and the order has not shipped, contact Harland Clarke Customer Service for assistance.
  - Select the **Cancel This Order** button to cancel the order. This button is visible if the order has not shipped.

**First Financial** **Branch ConnectionPoint®** Checks & Accessory Ordering, Account Holder Services & More Powered by **HARLAND CLARKE**

Express Order | Product Catalog | Accessories | Order Summary | Order History | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out

**Account Information**

Routing Transit: 999999991 Account: 070701

**Order History**


Order Date	Product Type	Description	Status
04/10/2014	Check	Purple Duplicate Custom Creations® w/o Screen	In Process
04/09/2014	Check	Purple Duplicate Custom Creations® w/o Screen	Shipped
04/09/2014	Deposit Ticket	Personal Deposit Ticket - Single	Shipped
04/02/2014	Check	Purple Duplicate Custom Creations® w/o Screen	Shipped
04/02/2014	Check	Purple Duplicate Custom Creations® w/o Screen	Canceled
05/14/2014	Check	Purple Duplicate Custom Creations® w/o Screen	Maintenance

[View Next Records](#)

**Order Details**

[Reorder](#) [Update Order](#) [Cancel This Order](#)

You are viewing: **Purple Custom Creations® w/o Screen**



**Personalization:**

THOMAS ANDERSON  
MARY ANDERSON  
123 ONE WAY PH. 800-643-5737  
SAN ANTONIO, TX 78249

**Ship To:**

THOMAS ANDERSON  
123 ONE WAY  
SAN ANTONIO, TX 78249

**Status:** In Process **Branch:** 00000

**Order Channel:** Branch ConnectionPoint - Reorder No Change (Direct)

**Special Program:** **Billing Code:** 00

**Quantity:** 240 **Total Price:** Price Not Available

**Starting Check Number:** 1061 **Logo:**

**Default Vinyl Cover:** No **Font:** Standard

**Expression/OSL1:** **OSL2:**

**2nd Sig Line:** No

**Entry Date:** 04/10/2014 **User ID:** A023131

**Ship Date:** **Ship To:** Customer

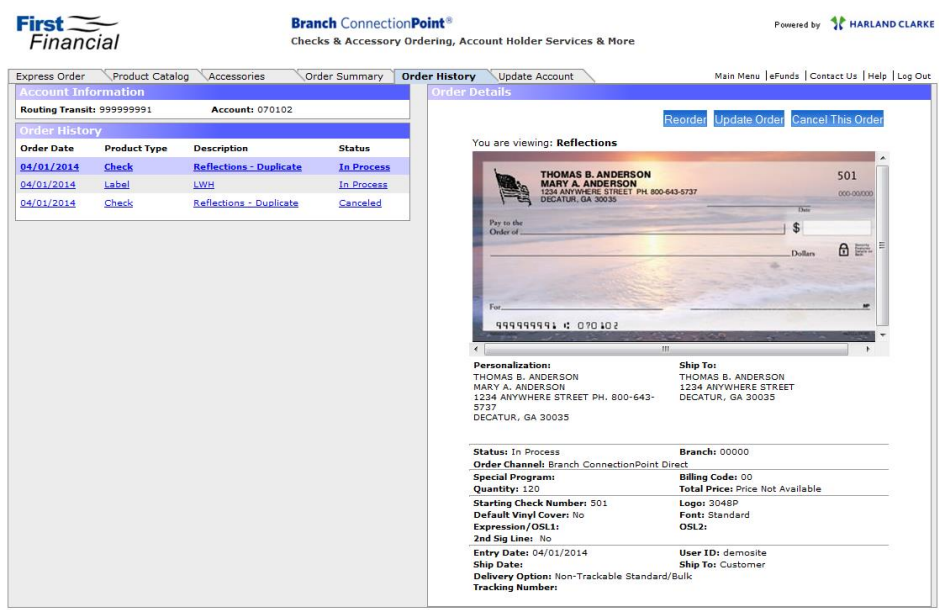
**Delivery Option:** Non-Trackable Standard/Bulk

**Tracking Number:**



## Updating the Order

1. You can make changes or corrections to a submitted order before it ships. If the Update Order button is **not** visible, contact Harland Clarke Customer Service for assistance.
2. From the Express Order page, select the Order History tab.
3. Select the order record with an **"In Process"** status.
4. Select the Update Order button.
5. Make the necessary changes on the Express Order page. Select Update, then Next.
6. Review the order details on the Order Summary page, then select **Submit Order**. The original order will be canceled and updated order placed into production.



**First Financial** **Branch ConnectionPoint®** Checks & Accessory Ordering, Account Holder Services & More. Powered by **HARLAND CLARKE**

Express Order | Product Catalog | Accessories | Order Summary | **Order History** | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out

**Account Information**  
Routing Transit: 999999991 | Account: 070102

**Order History**

Order Date	Product Type	Description	Status
04/01/2014	Check	Reflections - Duplicate	In Process
04/01/2014	Label	LWH	In Process
04/01/2014	Check	Reflections - Duplicate	Canceled

**Order Details**  
You are viewing: **Reflections**

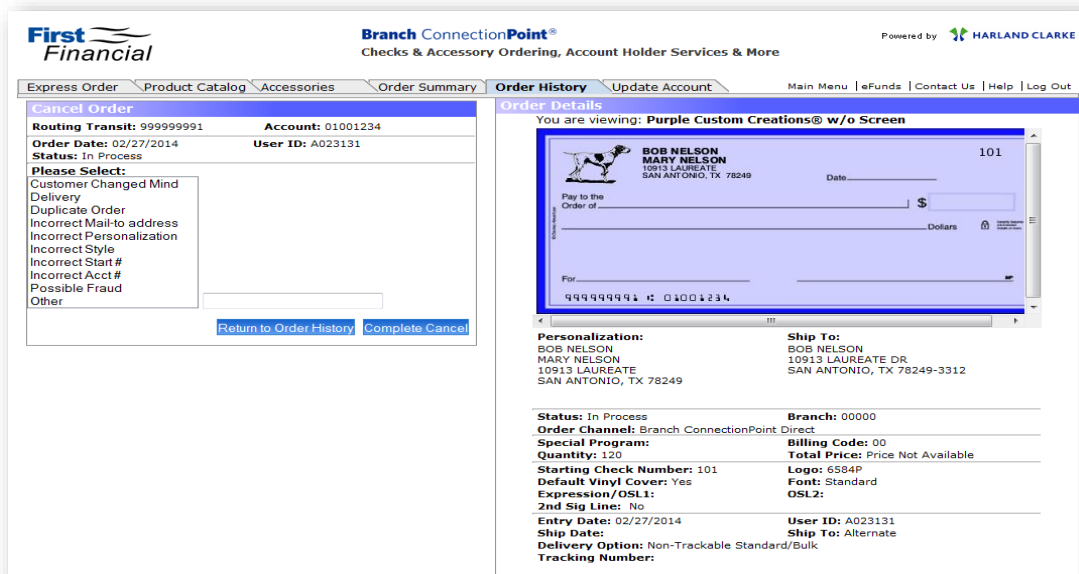
**Personalization:**  
THOMAS B. ANDERSON  
MARY A. ANDERSON  
1234 ANYWHERE STREET PH. 800-643-5737  
DECATUR, GA 30035

**Ship To:**  
THOMAS B. ANDERSON  
1234 ANYWHERE STREET  
DECATUR, GA 30035

**Status:** In Process **Branch:** 00000  
**Order Channel:** Branch ConnectionPoint Direct  
**Special Program:** Quantity: 120 **Billing Code:** 00  
**Starting Check Number:** 501 **Total Price:** Price Not Available  
**Default Vinyl Cover:** No **Logo:** 3048P  
**Expression/OSL1:** **Font:** Standard  
**2nd Sig Line:** No **OSL2:**  
**Entry Date:** 04/01/2014 **User ID:** demosite  
**Ship Date:** **Ship To:** Customer  
**Delivery Option:** Non-Trackable Standard/Bulk  
**Tracking Number:**

## Cancel Order

1. You can cancel an order if the order has not shipped.
2. After entering the account holder's information in the Account Information panel on the Main Menu, the Express Order page will load.
3. Select the Order History tab. If the order status is **"In Process"**, proceed with the Cancel Order process.
4. Select the desired record. On the Order Details panel, click the **Cancel This Order** button.
5. In the Cancel Order panel, select a Cancel Reason from the drop-down or enter a reason in the "Other" field.
6. Select the **Complete Cancel** button to cancel the order. The order Status will display "Canceled."
7. Select the Main Menu link to return to the Main Menu, or the Log Out link to log out of the web site.



**First Financial** **Branch ConnectionPoint®** Checks & Accessory Ordering, Account Holder Services & More. Powered by **HARLAND CLARKE**

Express Order | Product Catalog | Accessories | Order Summary | **Order History** | Update Account | Main Menu | eFunds | Contact Us | Help | Log Out

**Cancel Order**  
Routing Transit: 999999991 | Account: 01001234  
Order Date: 02/27/2014 | User ID: A023131  
Status: In Process

**Please Select:**  
Customer Changed Mind  
Delivery  
Duplicate Order  
Incorrect Mail-to address  
Incorrect Personalization  
Incorrect Style  
Incorrect Start #  
Incorrect Acct #  
Possible Fraud  
Other

**Order Details**  
You are viewing: **Purple Custom Creations® w/o Screen**

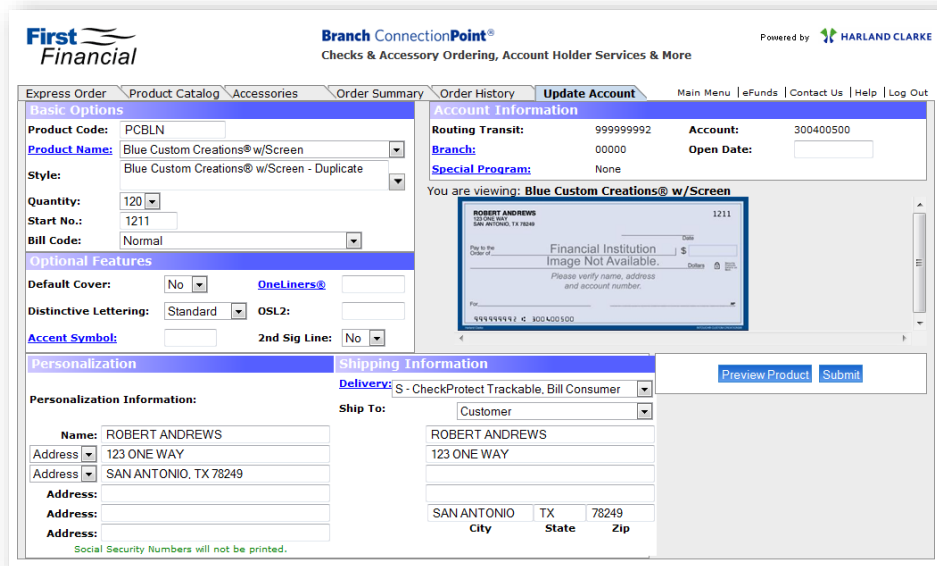
**Personalization:**  
BOB NELSON  
MARY NELSON  
10913 LAUREATE  
SAN ANTONIO, TX 78249

**Ship To:**  
BOB NELSON  
10913 LAUREATE DR  
SAN ANTONIO, TX 78249-3312

**Status:** In Process **Branch:** 00000  
**Order Channel:** Branch ConnectionPoint Direct  
**Special Program:** Quantity: 120 **Billing Code:** 00  
**Starting Check Number:** 101 **Total Price:** Price Not Available  
**Default Vinyl Cover:** Yes **Logo:** 6584P  
**Expression/OSL1:** **Font:** Standard  
**2nd Sig Line:** No **OSL2:**  
**Entry Date:** 02/27/2014 **User ID:** A023131  
**Ship Date:** **Ship To:** Alternate  
**Delivery Option:** Non-Trackable Standard/Bulk  
**Tracking Number:**

## Update Account Information

1. You can update the account holder's information without placing another order.
2. After entering the account holder's information in the Account Information panel on the Main menu, the Express Order page will load.
3. Select the Update Account tab. Make changes to the Basic Options, Optional Features, Personalization, and Shipping Information panels.
4. Select the [Preview Product](#) button to update the product information.
5. Select the [Submit](#) button to submit your updated information to Harland Clarke. A "Maintenance" record is added to the account holder's order history. The updated information will be brought forward on the next order.



**First Financial** **Branch ConnectionPoint®** Checks & Accessory Ordering, Account Holder Services & More Powered by HARLAND CLARKE

Express Order | Product Catalog | Accessories | Order Summary | Order History | **Update Account** | Main Menu | eFunds | Contact Us | Help | Log Out

**Basic Options**

Product Code: PCBLN  
 Product Name: Blue Custom Creations® w/Screen  
 Style: Blue Custom Creations® w/Screen - Duplicate  
 Quantity: 120  
 Start No.: 1211  
 Bill Code: Normal

**Account Information**

Routing Transit: 999999992 Account: 300400500  
 Branch: 00000 Open Date:  
 Special Program: None

You are viewing: **Blue Custom Creations® w/Screen**

**Optional Features**

Default Cover: No OneLiners®  
 Distinctive Lettering: Standard OSL2:  
 Accent Symbol: 2nd Sig Line: No

**Personalization**

Personalization Information:  
 Name: ROBERT ANDREWS  
 Address: 123 ONE WAY  
 Address: SAN ANTONIO, TX 78249  
 Address:  
 Address:  
 Address:  
 Social Security Numbers will not be printed.

**Shipping Information**

Delivery: S - CheckProtect Trackable, Bill Consumer  
 Ship To: Customer  
 ROBERT ANDREWS  
 123 ONE WAY  
 SAN ANTONIO TX 78249  
 City State Zip

[Preview Product](#) [Submit](#)