INSURANCE SCHOOLS, INC.

WWW.INSURANCE-SCHOOLS.COM

Steps to Placing an Order for Corporate Trainers and Licensing Coordinators who are Ordering Courses for Employees

1. Go to our website at: www.insurance-schools.com and click the "Sign In Your Account" link at the very top right of the screen beside the small shopping cart icon.

2. Once you have clicked the "Sign In Your Account" link, you will be taken to the logon screen. If you, the CORPORATE TRAINER/LICENSING COORDINATOR do not already have an active account on our website, you will complete the information in the box marked "NEW TO INSURANCE SCHOOLS?". If you, the CORPORATE TRAINER/LICENSING COORDINATOR, already have an active account, enter your own e-mail address and password in the SIGN IN boxes on the left of the screen. DO NOT ENTER THE NAME AND E-MAIL OF THE STUDENT(S) YOU ARE PURCHASING THE COURSE(S) FOR AT THIS POINT. As a corporate trainer/licensing coordinator, you need to be logged into your own account, NOT THE STUDENT'S ACCOUNT, to place orders for courses. After you have logged in, you will see your name appear at the top right of the page so that you know you are logged into the correct account. IF YOU SEE SOMEONE ELSE'S NAME AT THE TOP, LOG OUT AND LOG BACK IN UNDER YOUR OWN ACCOUNT BEFORE PROCEEDING WITH THE ORDER.

3. After you are logged into your account, navigate to the course you would like to purchase for your employees. Not sure which course package to order, click this link to download a chart that will quickly and easily explain the differences in all our course packages.

4. Once you have located the course you would like to purchase, scroll to the bottom of the description area and select the checkbox, "I am purchasing this course for someone other than myself". (This is because the CORPORATE TRAINER/LICENSING COORDINATOR (you) is signed in, and YOU are ordering for someone else.)

5. A quantity field will open. If you are ordering two of the same courses for two different employees, enter the number 2 in the quantity field and click the button. (You will enter the quantity of the SAME course you are ordering for more than one student/employee).

6. After you have clicked the Quantity button, the fields to enter the employee/students e-mail address(es) and first, last name(s). You will enter the names and email addresses into the fields. This is the email address the student will use to logon and to receive the logon information and password updates.

7. You will click to add these students to the cart and then begin the checkout process. Most corporate trainers/licensing coordinators use a credit card, but if you would prefer to be invoiced, you can select "Check By Mail" as your payment method. However, your company must already have an account that has been approved for invoicing.

8. After you, the corporate trainer/licensing coordinator, have completed the order, an email containing the logon information will be sent to the student's email address and to your email address. The receipt will be sent only to your email address.

9. Corporate Trainers/Licensing Coordinators also have the option to have a "back-door" account set up to allow them to view their student employee's progress in the course(s). Please send an email to support@insurance-schools.com to have this set up if you would like to have this feature activated free of charge.

10. To view and print receipts/invoices, you will go back to the "Sign In Your Account" link at the top right of the page and click the "Sign In Your Account" link. Then, click the Order History link to review all orders, print receipts, view any refunds, etc.