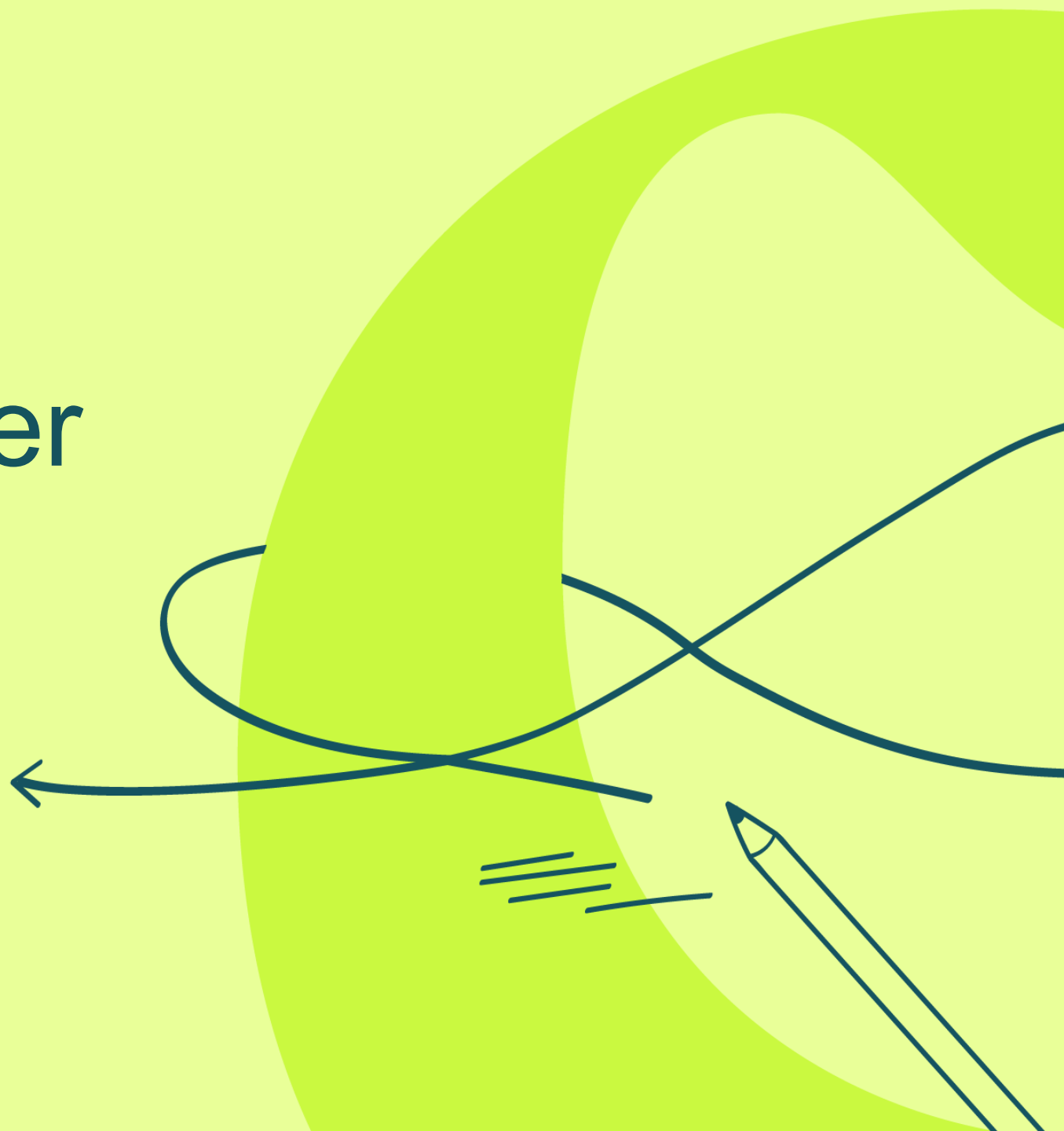


osaic

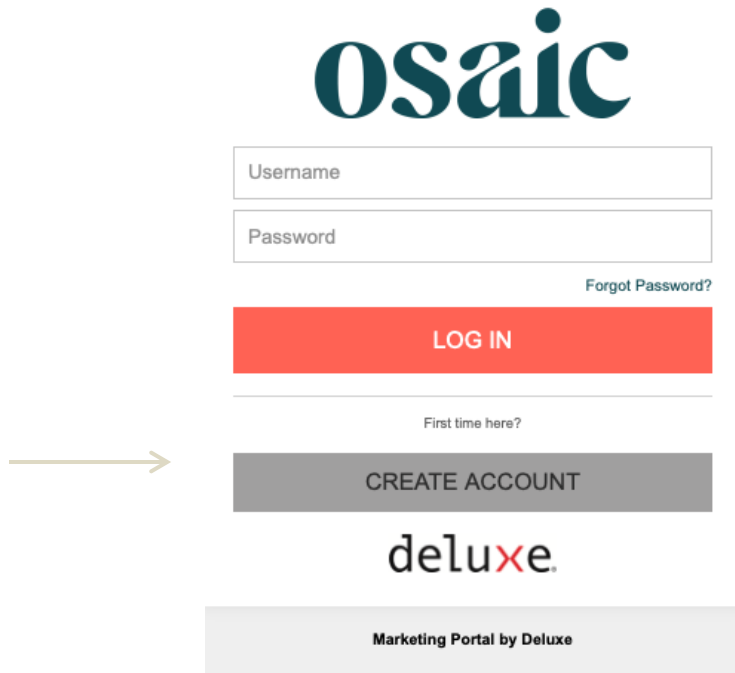
Osaic Print Center User Guide

Osaic.deluxebrand.com



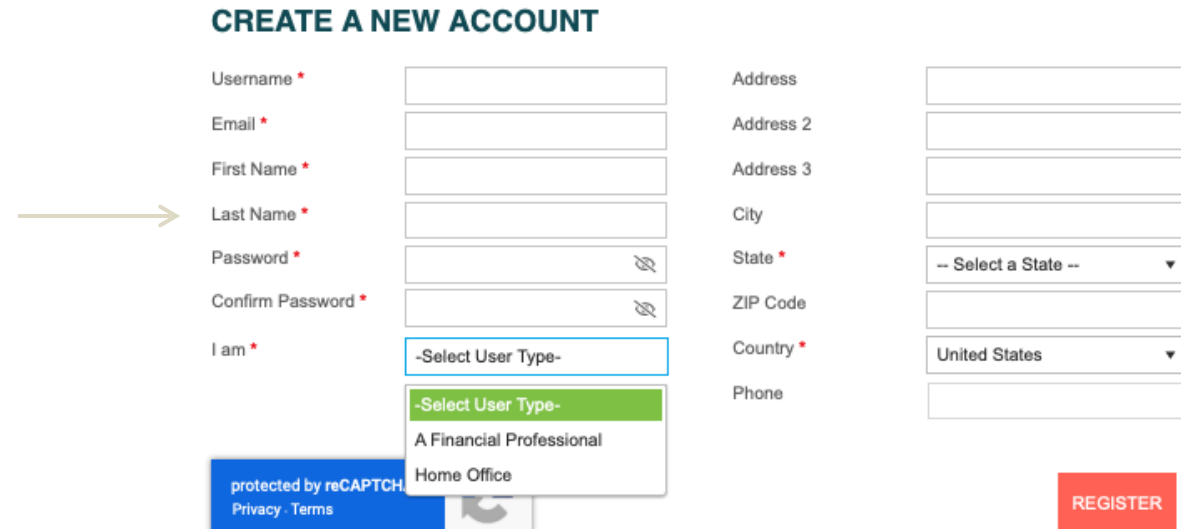
Create Account

1. Go to osaic.deluxebrand.com to create your new account and click “Create Account.”



The screenshot shows the osaic login and account creation interface. At the top is the 'osaic' logo. Below it are input fields for 'Username' and 'Password', with a 'Forgot Password?' link. A red 'LOG IN' button is present. Below the login section, a link 'First time here?' leads to a grey 'CREATE ACCOUNT' button. The 'deluxe' logo is at the bottom, with the text 'Marketing Portal by Deluxe' below it. An arrow points from the 'CREATE ACCOUNT' button to the next screenshot.

2. Complete all required fields and select the correct ‘I am’ dropdown with ‘A Financial Professional’ or ‘Home Office’
3. Click register to create your account.



The screenshot shows the 'CREATE A NEW ACCOUNT' form. It has a title 'CREATE A NEW ACCOUNT' and a 'protected by reCAPTCHA' notice. The form includes fields for 'Username', 'Email', 'First Name', 'Last Name', 'Password', 'Confirm Password', 'Address', 'Address 2', 'Address 3', 'City', 'State' (a dropdown menu), 'ZIP Code', 'Country' (a dropdown menu), and 'Phone'. The 'I am' dropdown menu is open, showing options: '-Select User Type-', 'A Financial Professional', and 'Home Office'. A red 'REGISTER' button is at the bottom right. An arrow points from the first screenshot to this one.

You will receive an account confirmation email.

Navigation

Category dropdown

osaic

Click to return to landing page

STORE CUSTOM REQUEST

Submit inquiry for different products

Search

Contact Us Advisor Test Not You? Log Out
Available Co-Op Dollars = \$20.00

ACCOUNT CART (1)

Compliance reminder

Reminder - If ordering personalized marketing collateral you are required to review proofs for accuracy, submit personalized item to compliance for review and approval, and wait for approval before printing or sending the product electronically.

- W2 Advisors
- Business Cards
- Letterhead/Envelopes
- Brochures/Flyers
- Booklets/Folders
- Greeting Cards
- Promotional Items
- Events
- Apparel

It Your Way

ards that leave
ng impression

NOW



Thank you

osaic



View account details

Quick link categories



Business Cards



Letterhead/Envelopes



Brochures/Flyers



Promotional

Viewing and Ordering Static Items

- To view an item, click on the product thumbnail image.
- To enlarge the item, hover over any portion of the product thumbnail

Booklets/Folders

1 - 1 of 1 Items



Osaic Pocket Folder

\$46.25 for 25

Min order of 25

In Stock



Order Now

Osaic Pocket Folder

SKU: OS-FOL



\$46.25 for 25

This pocket folder includes the Osaic logo and slot for a business card on the right side pocket.

Comes in packs of 25.

Inventory Information

Quantity On Hand : 148
Quantity Available : 148

Qty

25

Price

\$46.25

Quantity	Unit Price	Price
25	\$1.8500	\$46.25
50	\$1.7500	\$87.50
100	\$1.5000	\$150.00
150	\$1.4500	\$217.50

- To order, click on qty and choose preferred qty, Click order now and either continue shopping or proceed to cart



Added to cart

Osaic Pocket Folder

Cart Subtotal (1 Item(s)): \$46.25

Continue Shopping

Proceed To Cart

Osaic Pocket Folder

SKU: OS-FOL

Creating Personas

Before ordering items that will be customized with your personal information, please create a persona. Personas contain the fields and logic that will drive the customization on your products and minimize the steps required to order items. The logic also assists you in remaining compliant. You have the ability to create multiple personas if you present yourself differently for different audiences. Checking 'Set as default persona' will make that information pre-populate when customizing products. Please make sure to submit and receive approval from compliance prior to placing orders for customizable products.



- 1. Click +Add New Persona.

Personas

+ Add New Persona

Search by Persona or Persona Form Name

Active

Activate

Deactivate

<input type="checkbox"/> Persona Name	Form Name	User Group	Last Modified	Status	Preview
<input type="checkbox"/> Test Persona - Advisors	Osaic Wealth		July 16, 2025	Active	

1 to 1 of 1 | View: 20 << 1 >>

- 2. Name your persona and click “Add Persona”.

Create New Persona

Persona Name

Close

Add Persona

- 3. Enter details in both the Contact and Registration details sections

Contact Details

Registration Details

☐ Set as default persona

First Name *

Last Name *

Job Title

Address 1

Duplicate

Save

☐ Set as default persona

Designation 1 *

Designation 2 *

Designation 3 *

* Required Field

Ordering Items – Customized Products

1. Find a product, select order now



9 Questions to ask a Financial Advisor

\$35.35 for 25


Min order of 25

Ships in 0-3 Days



Order Now


2. Choose delivery type

\$35.35 for 25 

A two sided flyer with 9 questions to ask a financial advisor.

** This item can be delivered to you physically (printed) or electronically (via email). Select Order Now and then choose your delivery option. **

Delivery Option

Select an option... 

Select an option...

Delivered Physically

Delivered via Email

DBA-Delivered Physically

DBA-Delivered via Email


3. Choose persona, review data and update preview

Personalize Information


Enter information below to personalize your item.

Update Preview

Continue

 Reset Form

Select Persona

Test Persona - Advisors 

Select...

Test Persona - Advisors

Test Persona Institute

DBA Logo

Browse files

Maximum acceptable size 35 MB. Supported file types: .jpg, .jpeg, .png, .eps, .pdf, .gif

Many products will require, additional fields like, quantity, color blocks, image, or size. These must be selected before proofing

Ordering Items – Customized Products

4. Please name the proof and initial.

Review Proof

I agree with the statements below:

I have verified that all spelling and content are correct.

I am satisfied with how this proof represents the high resolution print job.

I understand I cannot make changes after I place this order, and I assume all responsibility for any errors.

All fields suffixed with an asterisk "*" must be completed.

Initial here *

Proof Name

Accept



Accept and Add Another



Back to Personalize



I am satisfied with how this proof represents the high resolution print job.

I understand I cannot make changes after I place this order, and I assume all responsibility for any errors.

All fields suffixed with an asterisk "*" must be completed.

Initial here *

Proof Name

Matthew

Accept



Accept and Add Another



Back to Personalize

Save for Later

Download Low Res PDF

- Review proof, if approved **please download low resolution version for compliance submission**, and either approve and leave in your cart, or **save for later**. Save for later files are under your Account Dropdown > My Library. Files added to cart can remain in your cart until compliance has approved the personalized information and disclosure.
- Once compliance approval is received, log back into your account and continue with placing your order.

Placing Your Order



1. Click on your cart

2. Review your items

3. Click “Checkout”

osaic

[Contact Us](#) [Advisor Test](#) [Not You? Log Out](#)
Available Co-Op Dollars = \$87.42

STORE ▾ CUSTOM REQUEST

Search





ACCOUNT ▾

CART (2)

[Continue Shopping](#)

[Clear Cart](#)

[Checkout](#)

Item	Qty	Subtotal
 Osaic Pocket Folder This pocket folder includes the Osaic logo and slot for a business card on the right side pocket. Available 148 Remove Save for Later	25 ▾	\$1.85 \$46.25 Click for Discounts
 Pearl Swirl Stress Ball Dissolve stress in mesmerizing swirls. The Pearl Swirl Stress Ball offers users a calming visual effect when the ball is squeezed or manipulated with the pearly swirling water inside. The soothing & hypnotic visual element distinguishes it & makes it appealing to those seeking stress relief combined with a captivating sensory experience. 2.5" Diameter x 2.5" Diameter - Lime Green Available ∞ Min Order Quantity: 100 Remove Save for Later	100	\$3.15 \$315.00

SUBTOTAL \$361.25

[Continue Shopping](#)

[Clear Cart](#)

[Checkout](#)

Editing in Your Cart

You can:

- Save an item for a later order
- Change quantity if needed
- Review the item proof that has been approved to print



◀ Continue Shopping

✕ Clear Cart


Checkout ▶

Item	Qty	Subtotal
<div><div><div><div><div></div><div>osaic</div></div><div></div></div></div><div><div><div><div><div></div><div>Osaic Pocket Folder</div><div>This pocket folder includes the Osaic logo and slot for a business card on the right side pocket.</div><div>Available 148</div></div><div><div><div>✕ Remove</div><div>📁 Save for Later</div></div></div></div></div></div><div><div><div>25</div><div>▼</div></div><div><div>\$1.85</div><div>\$46.25</div></div><div><div>Click for Discounts</div></div></div></div>		
SUBTOTAL		\$46.25

◀ Continue Shopping

✕ Clear Cart

Checkout ▶

SAVED ITEMS		
Item		Qty
	Pearl Swirl Stress Ball	
	Dissolve stress in mesmerizing swirls. The Pearl Swirl Stress Ball offers users a calming visual effect when the ball is squeezed or manipulated with the pearly swirling water inside. The soothing & hypnotic visual element distinguishes it & makes it appealing to those seeking stress relief combined with a captivating sensory experience. 2.5" Diameter x 2.5" Diameter - Lime Green	100
		Order Now

Placing Your Order

- Complete shipping detail; Please do not use P.O. Boxes for the Shipping Address
- Items are shipped via UPS and will not be delivered to a P.O. Box
- When ready to complete order, click “Review and Place Your Order”.

Shipping and Billing

Submit Order

Order Completed

Compliance Approval required: If this order contains personalized product, you must have approval before checking out to place the printed or electronic files order.

Ship Address

Address Book

Location

Attn/Contact

Company Name

Address Line 1

Address Line 2

Address Line 3

City

State

Country

ZIP Code

Phone Number

Business

Residential

Advisor Test

123 Smith

Phoenix

Arizona

United States

121231

Billing Address

Same as Shipping

Attn/Contact

Company Name

Address Line 1

Address Line 2

City

State

Country

ZIP Code

Phone Number

Advisor Test

123 Smith

Phoenix

Arizona

United States

121231

Order Information

Order Tag

Alternative Email

Estimated Ship Date

7/21/2025

Additional Information

Compliance Status

REVIEW AND PLACE YOUR ORDER

All fields suffixed with an asterisk (*) are required.

-- Select an Option --

Order was approved by compliance

Order was NOT approved by compliance

Order does not require compliance approval

Order Comments

We made some changes to your address

Original

3680 Victoria Street

Arden Hills, MN 55126

US

Updated

3680 Victoria St N

Arden Hills, MN 55126-2906

USA

Use Original Address

Use Updated Address

You are required to answer the compliance question before proceeding

Additional Information

Compliance Status

REVIEW AND PLACE YOUR ORDER

All fields suffixed with an asterisk (*) are required.

-- Select an Option --

Order was approved by compliance

Order was NOT approved by compliance

Order does not require compliance approval

Completing Your Order

1. Select Shipping Option

2. Enter Credit Card information

3. Click “Place Order”

Shipping Options

☒ UPS Ground \$37.32
☐ UPS 3Day Select \$73.82
☐ UPS 2nd Day \$100.40
☐ UPS Next Day \$180.40

Total Weight: 39.20 lbs

☐ Signature Required

Payment Options

Please select your desired payment option.

☒ Credit Card ☐ Bill Me Later

You will be asked to enter your credit card information when you click Place Order.

Pricing Summary

Subtotal	\$315.00
Sales Tax	\$27.77
Shipping and Handling	\$37.32
TOTAL	\$380.09

PLACE ORDER

Your order has been placed.

This message is confirming the order details of your recent purchase. You will receive another message when your order ships.

Order #: CER-470
Ordered By: Kathy Summy (ksummy-cfg)
Order Total: \$110.00
Status: Released

Ship To:
Company Name
Name
Street
Ste
City, ID 00000
(218) 824-1851
ksummy@rangedelivers.com

Comments:

Order Summary

Product	Order Qty Each	Order Qty Pieces	Subtotal
Cetera Advisors (Reps) Business Card - with Back Disclosure CER-T-BC07B1130UC44M0-REP	250	250	
Proof: Name the Proof - for your reference only			\$30.00
DBA - Ladies Nike Dri-Fit Micro Pique Polo BLACKWhiteThread-S CER-DBA-Nike354067-BLACKWhiteThread-S	1	1	
Color: Black with white thread Please allow 15 business days for production Extended sizes are additional. Proof: Test Apparel			\$80.00
Subtotal:			\$110.00
Order Total:			\$110.00

The payment method for this order was **Bill Me Later**.

The delivery option you selected was **Best Way**.

- After payment, “Your order has been placed” email will be sent.
- Your order is now complete and will be forwarded for processing.
- For e-delivery file orders, an email with file link is sent after order confirmation.
- A confirmation email will be sent when your order ships.

osaic

For Assistance Contact Us

Phone: (866) 828-9905

Email: OsaicSupport@Deluxe.com

Support Hours: 8 AM – 5 PM CST

Thank you!

