

SUPPLY REQUISITION MGA GUIDELINES



High values. Sound assets.

Desjardins Financial Security has a direct ordering system, through its warehouse facility, for all materials and forms. You must use this system for all DFS materials, **except illustration software**. Your main offices and respective sub-agencies must use this ordering system.

Prerequisite:

- Your office must be able to receive **Purolator** courier deliveries.

There is a simple two-step procedure for ordering material:

1. Complete a **Supply Requisition form 99170E**. The form has 13 information areas. Please note:

1 – CUSTOMER NO.	Leave blank or use the customer number assigned to you (refer to a previous delivery and see your customer number on your shipping notice under "ship to")
2 – SHIP TO	Your office name and full mailing address
2A – TELEPHONE	Your phone number - including area code & extension
3 – LOCATION	Leave blank
4 – DATE	Today's date
5 – COMPANY NO.	Leave blank
6 – COST CENTRE	02825
7 – ACCOUNT NO.	Leave blank
8 – FORM / ITEM NO.	Write the form number
9 – QUANTITY	How many of the items
10 – DESCRIPTION	Give details
11 – ORDERED BY	Print your name
12 – APPROVED BY	Sign your name
13 – PAGES	Indicate the number of pages sent

2. Fax the completed form **99170E** to **(418) 833-5574**

The form will be returned to the sender for one of the following reasons:

- The form is incomplete
- The wrong form was used
- The form was faxed to the wrong number

Please order 'reasonable' quantities or limitations will automatically be applied.

Please see questions and answers on other side.

Request for materials - Questions and Answers

What kind of materials can I order from the warehouse?

Generally speaking all numbered forms, including brochures and application forms are ordered from the warehouse.

What items can I not order from the warehouse?

Fusion, the illustration software, must be requested from your Account Executive or the Sales Department in Toronto. To request an item contact Marketing at 1-800-685-7223 or email to advisor@dfs.ca. Please note that Fusion may be downloaded from Webi without waiting for a CD.

Are there alternative sources for forms and materials?

Yes, the DFS WEBI Internet sites have an extensive collection of electronic forms that may be downloaded and printed. WEBI can be used by offices and individuals to access forms.

Can an individual life insurance representative order materials from the warehouse or head office?

Life insurance representatives who request materials will be referred to your office in order to get the material they require.

We have a sub-office that wants to get material directly, so how can they receive it?

If the office receives **Purolator** courier service they can receive the material directly.

How do I find out the form numbers and names of the materials?

Please refer to the list of forms in WEBI for form numbers. In addition we announce new forms through various communications on a regular basis.

Click this link to see the [forms section](#) of Webi.