VAXSERVE ›› QUICK GUIDE

## Logging In and Creating a New Username

Note: For improved security, the new website requires that each email only be associated with a single username and account. If your email was associated with multiple emails or accounts, you will need to sign up with a single username for a single account.

LOGGING IN
From the main homepage, simply enter your current Username and Password. If you've forgotten either, simply click the **Forgot Username or Password** links.

CREATING A USER NAME
If you're new to VaxServe or need to add a new user to an existing account,
you can do so from the log in module on the homepage or in the navigation.
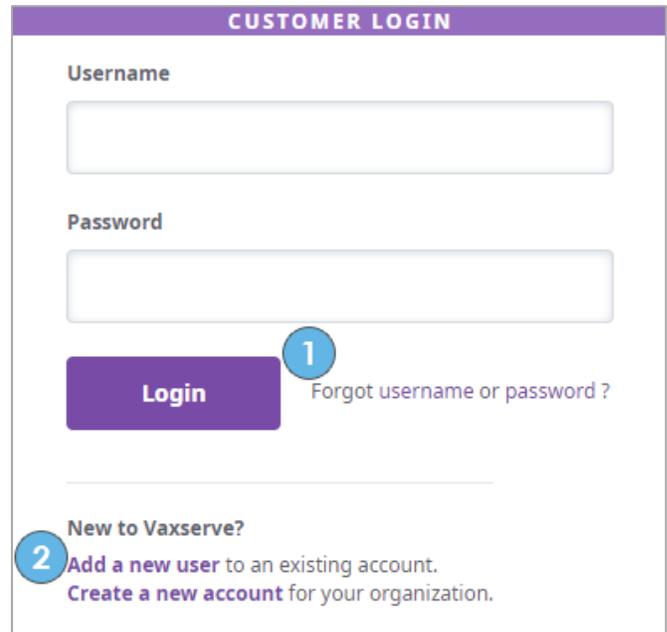
CUSTOMER LOGIN

Username

Password

Login   Forgot username or password ?

New to Vaxserve?
Add a new user to an existing account.
Create a new account for your organization.

ONCE LOGGED IN – ACCOUNT OVERVIEW

You will land on the **Account Overview** page. This page represents a snapshot of your account in a single space. This page will contain information about your most recent **Order History**, **Invoices**, **Payments**, **Credits** and **Statements**. Additionally, you will find links to expanded historical views of all of those, as well as links to **Reports**, your **Influenza Orders**, and more.

You can also click the "My Account" link in the upper right corner to navigate to specific sections to manage your business:
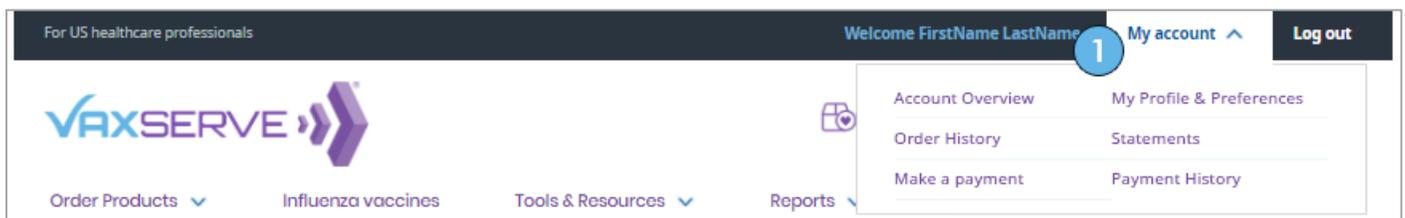
For US healthcare professionals   Welcome FirstName LastName   My account ∧   Log out

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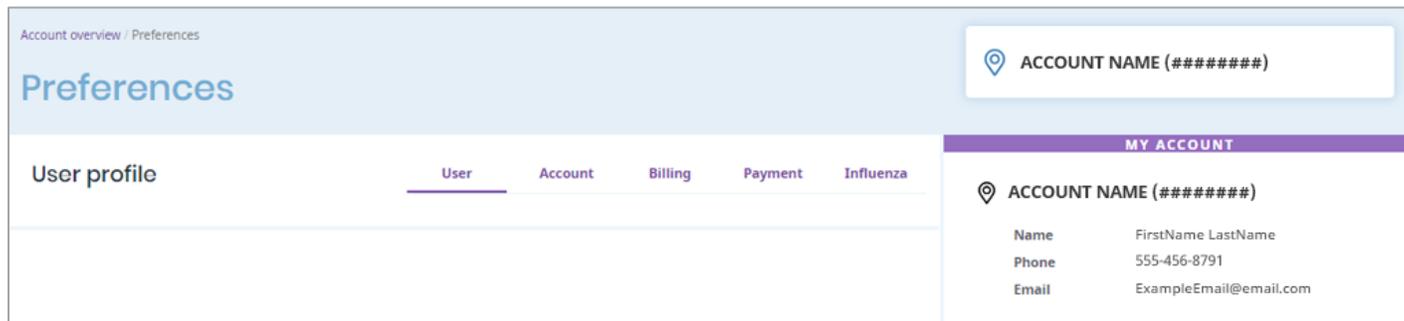Order Products ∨   Influenza vaccines   Tools & Resources ∨   Reports

Account Overview   My Profile & Preferences
Order History   Statements
Make a payment   Payment History

- **Account Overview:** This is the main landing page when you log in
- **Order History:** View your Order History and order shipment statuses
- **Make a Payment:** Pay invoices, or simply view your Credits, Invoices and Scheduled Payments
- **Statements:** View your historical Statements
- **Payment History:** Review payment history

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Managing Your Account

MY PROFILE and PREFERENCES

In the 'My Profile and Preferences' section of VaxServe, you can make any necessary changes to the user, account data, billing, shipping and payment information.

Within this section, we recommend checking your account information to ensure all are accurate and up-to-date.

Some information that we recommended you review:

User: Your role, Email Address and Password Hint Question

Account: Address, Shipping Hours and License information

Billing: Invoice and Statement delivery Preferences

Payment: Review your payment methods, and confirm your defaults

Influenza: Manage your Influenza Vaccine Locator and Recurring Reservation opt-in preferences

Financials

CREDITS and INVOICES

Under the "My Account" link in the upper right corner, navigate to "Make a payment". Here you will find a comprehensive dashboard to:

1. Review your Credits and apply them to an invoice
2. Make payment on an Invoice
3. Review your Scheduled Payments

Make a payment

XLS   PDF

Credits

If an invoice already has a scheduled payment, you must cancel it before you can apply a credit.

	Credit #	Credit date	Credit amount	Apply to invoice	Credit applied
☐	495797	05/28/2017	$143.22	Select ⌄	
☐	492330	03/12/2017	$555.35	Select ⌄	

Open invoices

We accept the following cards

Payment option	Invoice #	Invoice date	Due date	Invoice balance	Prompt Pay discount	Payment amount
☐ Pay Now ⌄	914311550	09/09/2020	09/09/2020 ⓘ	$3,795.15	—	
☐ Pay Now ⌄	914379568	09/04/2020	12/04/2020	$82.59	$1.65	

Scheduled payments

All pay at terms invoices will appear here.

Invoice #	Invoice balance	Prompt Pay discount	Payment amount	Scheduled payment date	Payment method	Expiration	
914234349	$4,321.88	—	$4,321.88	12/16/2020	#266789	—	•••
914311929	$8,770.26	$172.92	$8,597.34	02/06/2021	#266789	—	•••
914271267	$5,809.78	$113.10	$5,696.68	03/25/2021	VISA #1111	02/23	•••

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Ordering Products

There are multiple ways to order products on the website. We will outline the following below: **Product Catalog**, **Quick Order**, **Reorder**, and **Saved Order**.

PRODUCT CATALOG

Under the "**Order Products**" link in the website header, you will find a full product catalog. You can click the menu title to see all items from all categories or click one of the individual categories to navigate deeper.
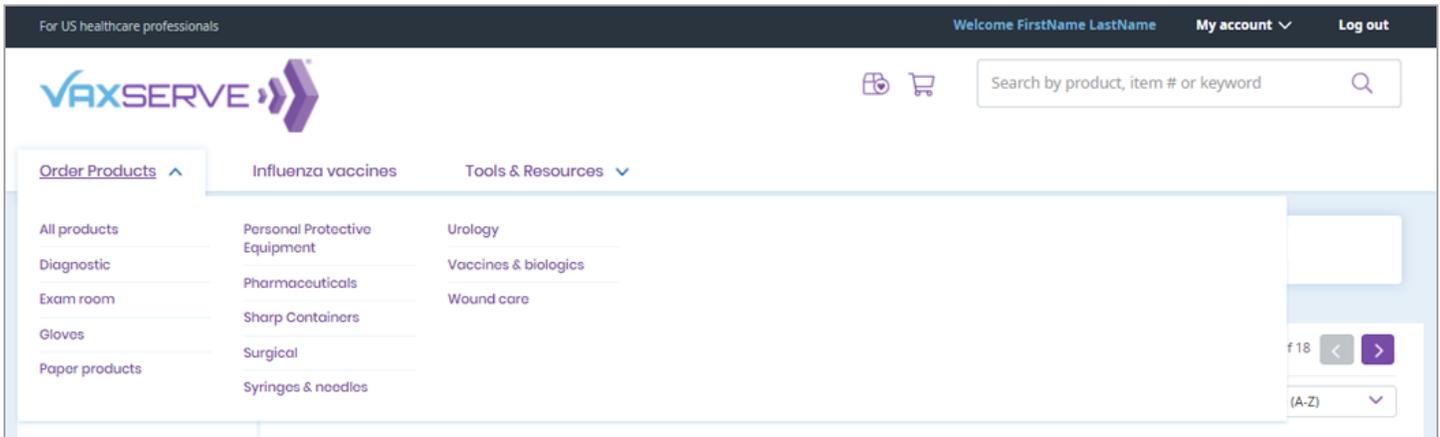
Once on the **Order Products page**, you can use the **Filters** in the left column to refine the listings and find the specific products you are looking for.

- Browse by Category
- Filter by Category or Manufacturer
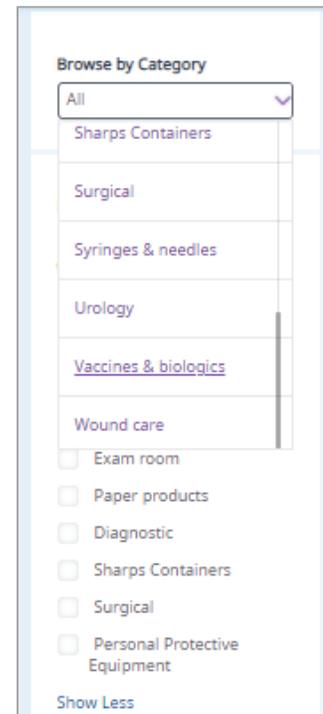
Once you find the items you need, simply use the **Quantity box** to define how many you need, add use the **"Add to Cart" button**.

COMPLETING AN ORDER

When you are ready to purchase the items you have added, simply click on the **Cart Icon**:
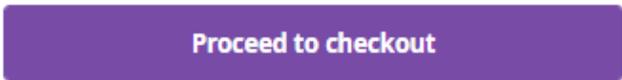
On the **Cart page** you will be able to review the items you added, pricing and quantities.

Utilize the calendar module at the top of the page to select your **Requested delivery date**.

Requested delivery date | 📅 03/31/2021

The requested Date is not a guarantee and may change based on product availability and unforeseen delays

Proceed to checkout

Once satisfied, you can click the "Proceed to Checkout" button, which will begin the **Checkout** process. You will still have an opportunity to review you quantities, total cost, shipping location, payment method, and contact.

Once on the **Checkout page**, you will be able to add information or make final checks, such as:
1. Add a PO, Attention name, and/or Special Instructions
2. Check your totals
3. Select your Payment Method
4. Edit cart – This will take you back to the Cart page allowing you to adjust quantities and items
5. Continue – This will provide one final prompt for payment confirmation, completing the order

Checkout 8 units | ‹ Continue shopping | 🔲 Save order | XLS | 🖨 Print

📍 Account Name (########) | Requested delivery date 03/25/2021 —

Order total: $1,555.00

Total savings: $14.87

Ship to
Facility Name
123 Main Street
Towne, PA 18370

PO# (Optional) ①

Attention (Optional)
John Smith

Special Instructions (Optional)
Requires signature

Special instructions will delay processing.

② Location subtotal $1,486.88
Sales tax $82.99
VaxServe.com savings -$14.87
Location total **$1,555.00**

⑤ **Continue**
④ **Edit cart**

By placing this order, you agree to the Terms & Conditions

Payment method
③ Bill me later ⌄

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Influenza Vaccine Reservations

INFLUENZA VACCINES DASHBOARD

Upon clicking the "Influenza" in the header menu, you will be taken to your Influenza Dashboard. Here you can manage your current Influenza Vaccine Reservations or create new ones.

1. You will see all Active formula years on the left side of the page. If there are 2 formulas available, you will see reservations under each, and/or the ability to create a new reservation under each specific year.

2. If you have no reservations for a specific year:
   a. You will see the "Reserve Doses Now" link in the left column.
   b. You will also see a "Reserve Doses Now" button in the center of the Dashboard.

3. If you have any open reservations for a specific year (not yet fully shipped), you can add to that reservation rather than making a new one. *(more on that below)*
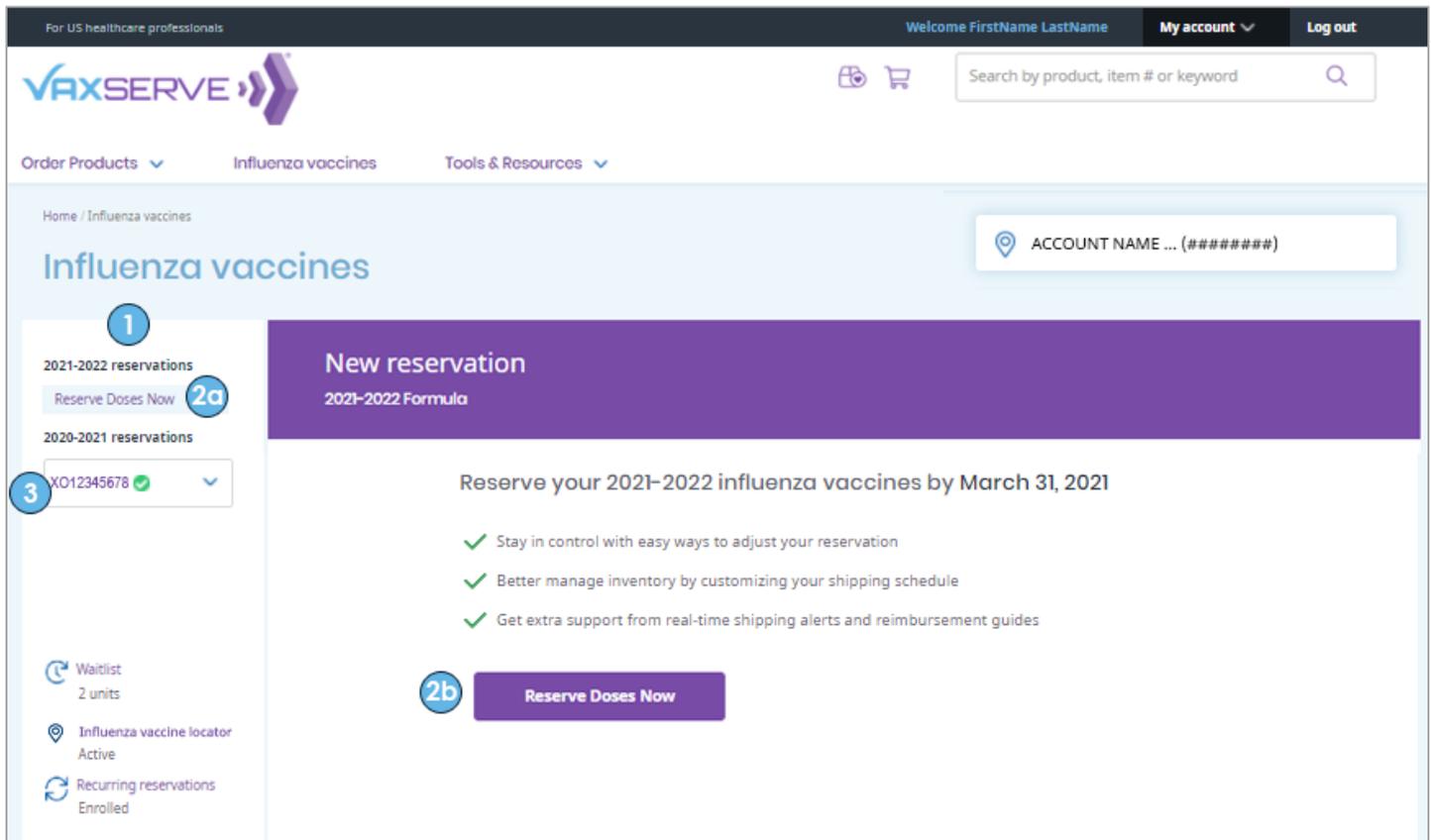
Once you select a specific reservation from the left side of the page, your center Dashboard will update with information on shipments within that specific reservation.

1. **Select Reservation:** Select a reservation in the left column by clicking on the number to open the data in the main Dashboard (you may also have a drop-down for selecting the reservation).
2. **My Shipments Charts:** The data in the middle of the page will populate with shipments specific to that reservation, including all TBD, Scheduled, and Shipped.
3. **Tracking:** Tracking information will populate as each shipment is tendered to a carrier.
4. **Edit Reservation:** If you need to make changes to your reservation (add or remove doses), click the "Edit reservation" button at the top of the Dashboard and step through the screens to submit changes.
5. **View Details:** If you simply need to view information for the existing reservation, but don't need to adjust, the "View reservation details" button will provide you with a thorough overview.

If you have questions, please reach out to VaxServe Customer Service at **1-800-752-9338** or vaxserve@vaxserve.com