

Logging In and Creating a New Username

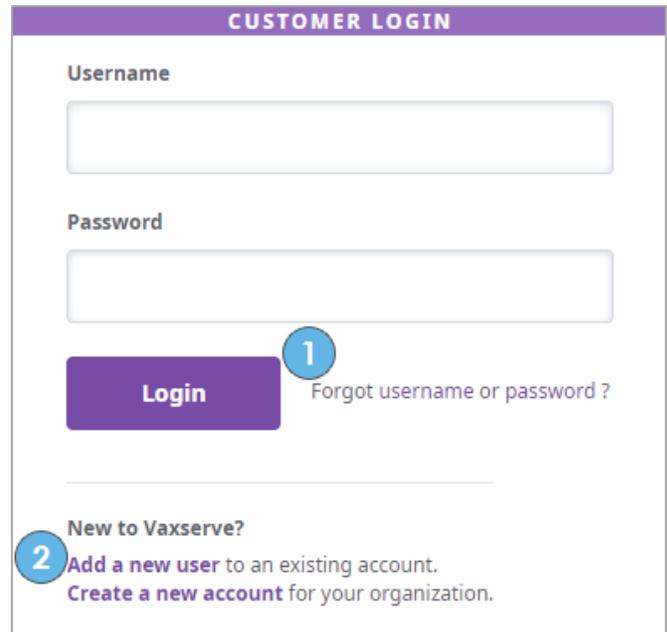
Note: For improved security, the new website requires that each email only be associated with a single username and account. If your email was associated with multiple emails or accounts, you will need to sign up with a single username for a single account.

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

1 Forgot username or password ?

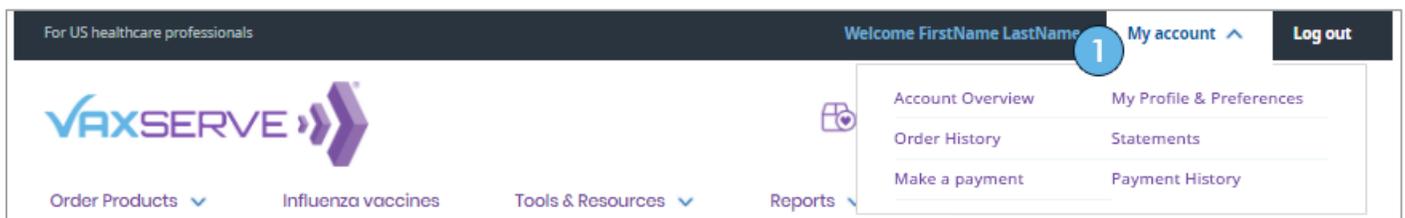
Login

2 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

1 My account ^

Log out

VAXSERVE

Order Products v Influenza vaccines Tools & Resources v Reports v

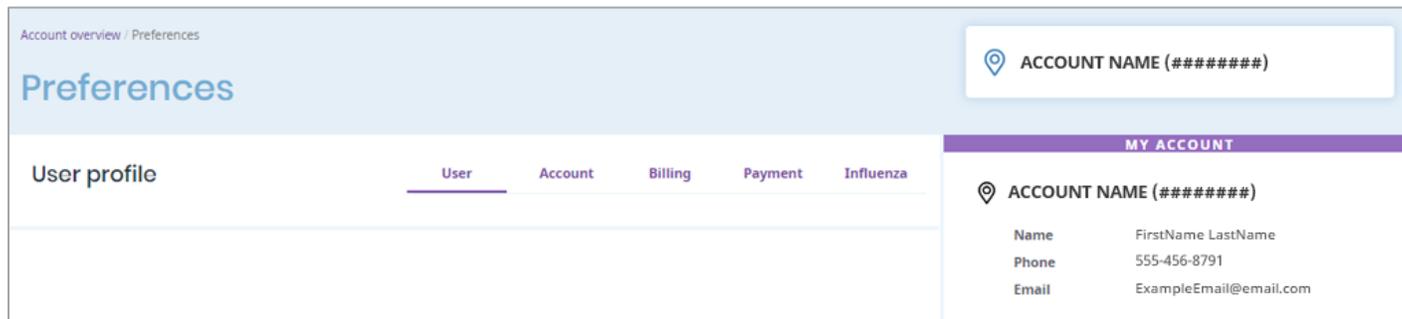
- Account Overview
- My Profile & Preferences
- Order History
- Statements
- Make a payment
- Payment History

- **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

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.



Account overview / Preferences

Preferences

ACCOUNT NAME (#####)

User profile

User Account Billing Payment Influenza

MY ACCOUNT

ACCOUNT NAME (#####)

Name	FirstName LastName
Phone	555-456-8791
Email	ExampleEmail@email.com

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
<input type="checkbox"/>	495797	05/28/2017	\$143.22	Select 1	<input type="text"/>
<input type="checkbox"/>	492330	03/12/2017	\$555.35	Select	<input type="text"/>

Open invoices

We accept the following cards    

Payment option	Invoice #	Invoice date	Due date	Invoice balance	Prompt Pay discount	Payment amount
<input type="checkbox"/> Pay Now 2	914311550	09/09/2020	09/09/2020 ⓘ	\$3,795.15	—	<input type="text"/>
<input type="checkbox"/> Pay Now	914379568	09/04/2020	12/04/2020	\$82.59	\$1.65	<input type="text"/>

Scheduled payments

All pay at terms invoices will appear here.

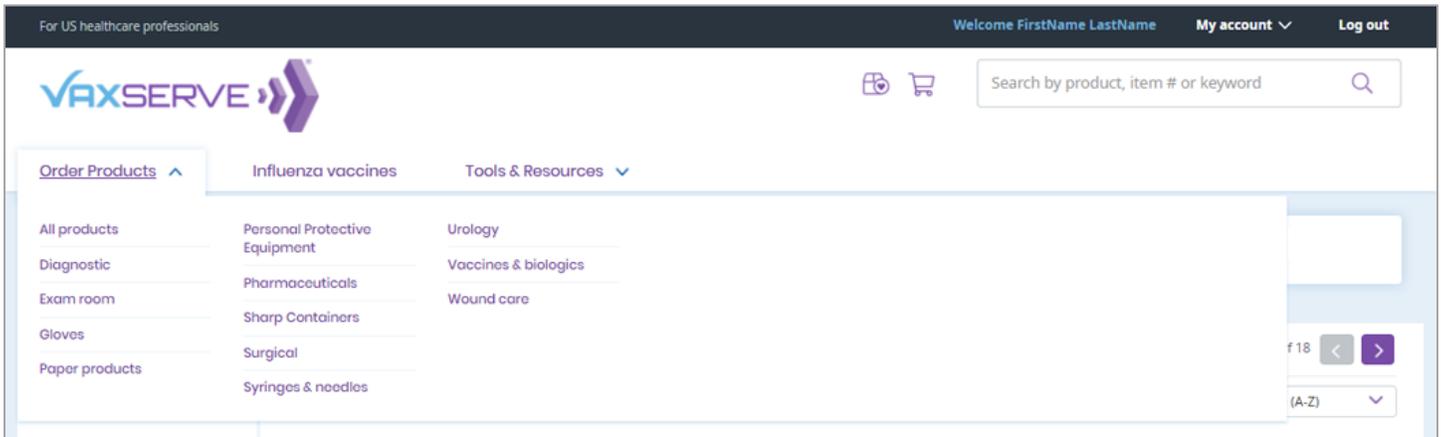
Invoice #	Invoice balance	Prompt Pay discount	Payment amount	Scheduled payment date	Payment method	Expiration	
914234349	\$4,321.88	—	\$4,321.88	12/16/2020	 #266789	—	3 ⋮
914311929	\$8,770.26	\$172.92	\$8,597.34	02/06/2021	 #266789	—	⋮
914271267	\$5,809.78	\$113.10	\$5,696.68	03/25/2021	 #1111	02/23	⋮

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**.

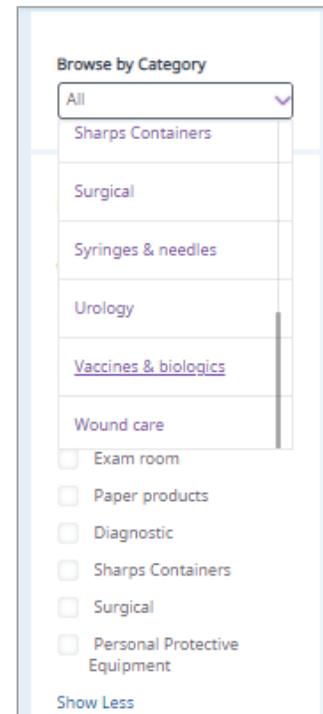
PRODUCT CATALOG

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**:

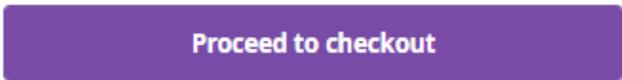


On the **Cart page** you will be able to review the items you added, pricing and quantities.

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



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

Ship to

Facility Name
123 Main Street
Towne, PA 18370

PO# (Optional) 1

Attention (Optional)

Special Instructions (Optional)

Special instructions will delay processing.

Location subtotal 2 \$1,486.88

Sales tax \$82.99

VaxServe.com savings -\$14.87

Location total \$1,555.00

Order total: \$1,555.00

Total savings: \$14.87

5 Continue

4 Edit cart

By placing this order, you agree to the [Terms & Conditions](#)

Payment method

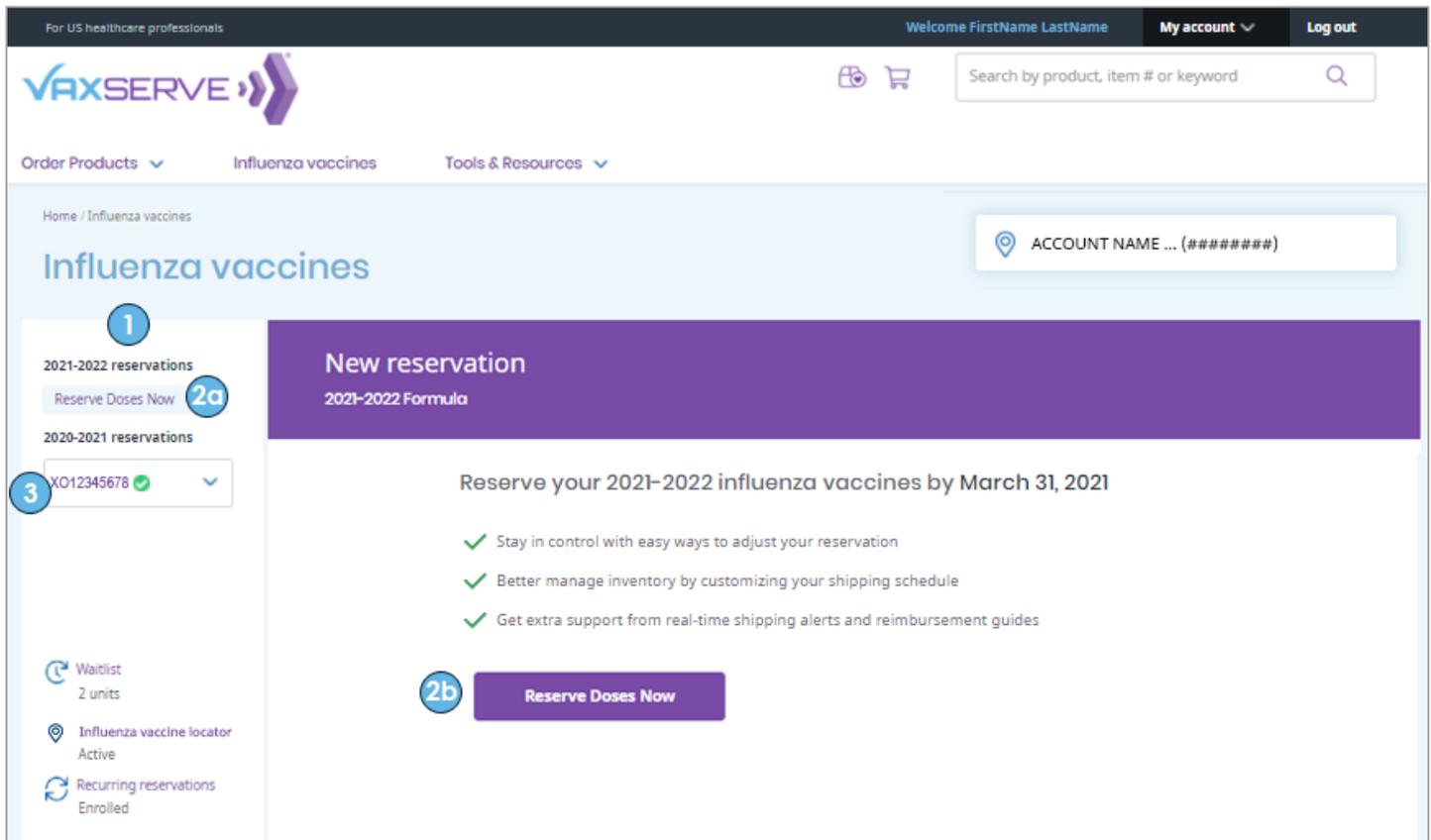
3 Bill me later

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.

- 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).
- 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.
- Tracking:** Tracking information will populate as each shipment is tendered to a carrier.
- 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.
- 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.

2021-2022 reservations

Reserve Doses Now

2020-2021 reservations

XO12345678 1

Waitlist
2 units

Influenza vaccine locator
Active

Recurring reservations
Enrolled

Reservation XO12345678

2021-2022 Formula | Confirmed ✔

4 4 Edit reservation
5 5 View reservation details

My shipments 2

420 of 780
Doses scheduled

Download shipping info:

CSV XLS PDF

Shipment status	Ship date	Units/Doses	Tracking
● Scheduled	02/10/2021	36/360	
● Shipped	01/11/2021	8/80	901234567891 3
● Shipped	01/19/2021	20/200	902345678912
● Shipped	01/20/2021	12/120	903456789123
● Shipped	01/21/2021	2/20	904567891234

Showing 5 of 5 [View all shipments](#)

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