

Web Tutorial: How to Change Account Profile Preferences

1

Click on Preferences

- A. Log-in
- B. Click My Account
- C. Expand (+) My Profile
- D. Click Preferences

2

Select your Preferences

- A. Select your Preferences on this page
- B. Click Submit

ORDERING / CHECKOUT PREFERENCES:

Default Catalog: MEDICAL

Express Checkout:
 On
 Off

Default Payment Method: Bill On Account

Default Shipping Method: UPS Standard Delivery

Do not display recommendations.

Barcode Scanner: Set my Default ordering quantity equal to:
 Last Quantity Ordered (if never ordered, a quantity of 1 will be used)
 Quantity equal to 1

SAVINGS REMINDERS:
 Display missed savings opportunities on users current order.

E-MAIL PREFERENCES:

Special Offer Notifications:
 E-mail Specials:
 Text only
 Text and Pictures (note: some e-mail programs do not accept this type of message)
 Mail Specials

Order E-mail Notifications:
 Send me an e-mail when my order is received for processing.
 Send me an e-mail when all or part of my order is shipped.
 Send me a copy of the order confirmation e-mail for all orders others submitted but I approved for processing.
 Send me order confirmation emails for all locations I have access to.
 Send me an email when the specified percentage of the monthly budget is used.

Approval E-mails:
 Send me an e-mail when an order is waiting for approval.
 Send me an e-mail when my order is waiting for approval. Send email after Day(s)

Reconciliations:
 Receiving - Send me shipment confirmations for all shipping locations I have access to.
 Invoice Approvals - Notify me when a user has verified the receipt of a shipment for a shipping location I have access to.
 Invoice Approval Reminder - Send me a reminder email about invoices I have not approved for payment.
Send email after Day(s) from the date the shipment was verified.

Payments - Send me an email when an invoice has been approved for payment.

Inventory Management E-mails:
 Quantity on Hand Reminder: Send me an e-mail when it's time to perform a cycle count for the Frequent Count Notification items in my inventory list.
Send me an email day(s) before my next scheduled order date.
 Reminder to Order: Send me an e-mail to remind me of my next scheduled order(s).

My Account

- Statements & Payments
- Reconciliations
- Inventory Management
- Orders
- My Profile
- User ID/Password
- Contact Information
- Preferences
- Credit Cards
- Site Administration
- Custom Order Messages
- Controlled Substance Info
- Barcode Scanner
- Custom E-Catalogs
- Customer Item Number
- My Practice PRIVILEGES

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