Customer Ordering Portal User Guide

ORDERS.HSALLERGY.COM

Customer Ordering Portal

Orders. Payments. Account Management.

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Home Page Features

My Account Management

1 Change or update your personal information including contact information, password & secret question by clicking on your name.

Product Catalog Search

There are two easy ways to search for products

2 Use the Search Products function on the home screen to search using key words or the item code.

3 Search a product name or item code in the search box at the top of the screen.

Featured Products

4 This area highlights some of our most popular products.

Quick Links

5 One click will take you straight to your orders, invoices and user profile.

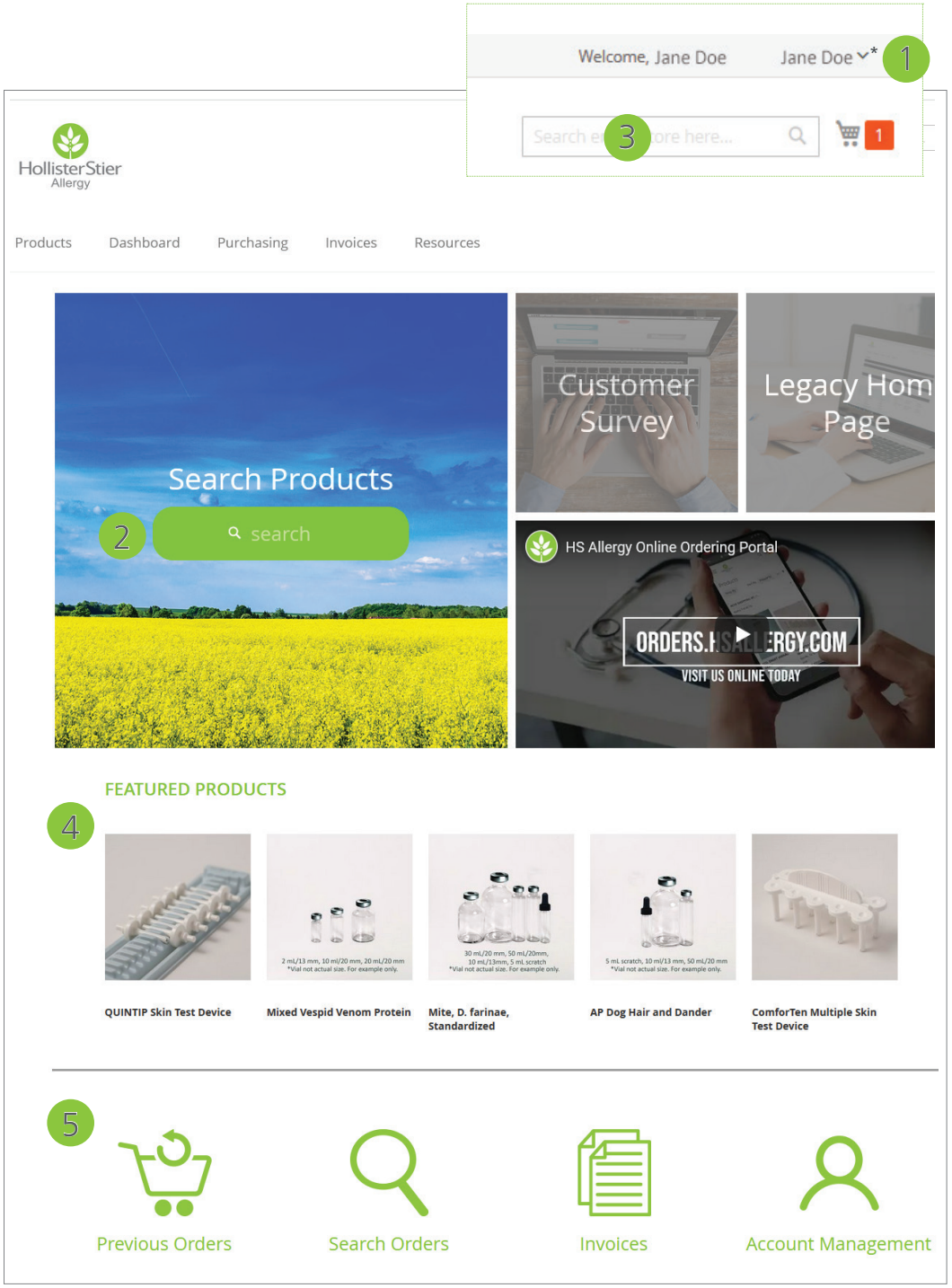
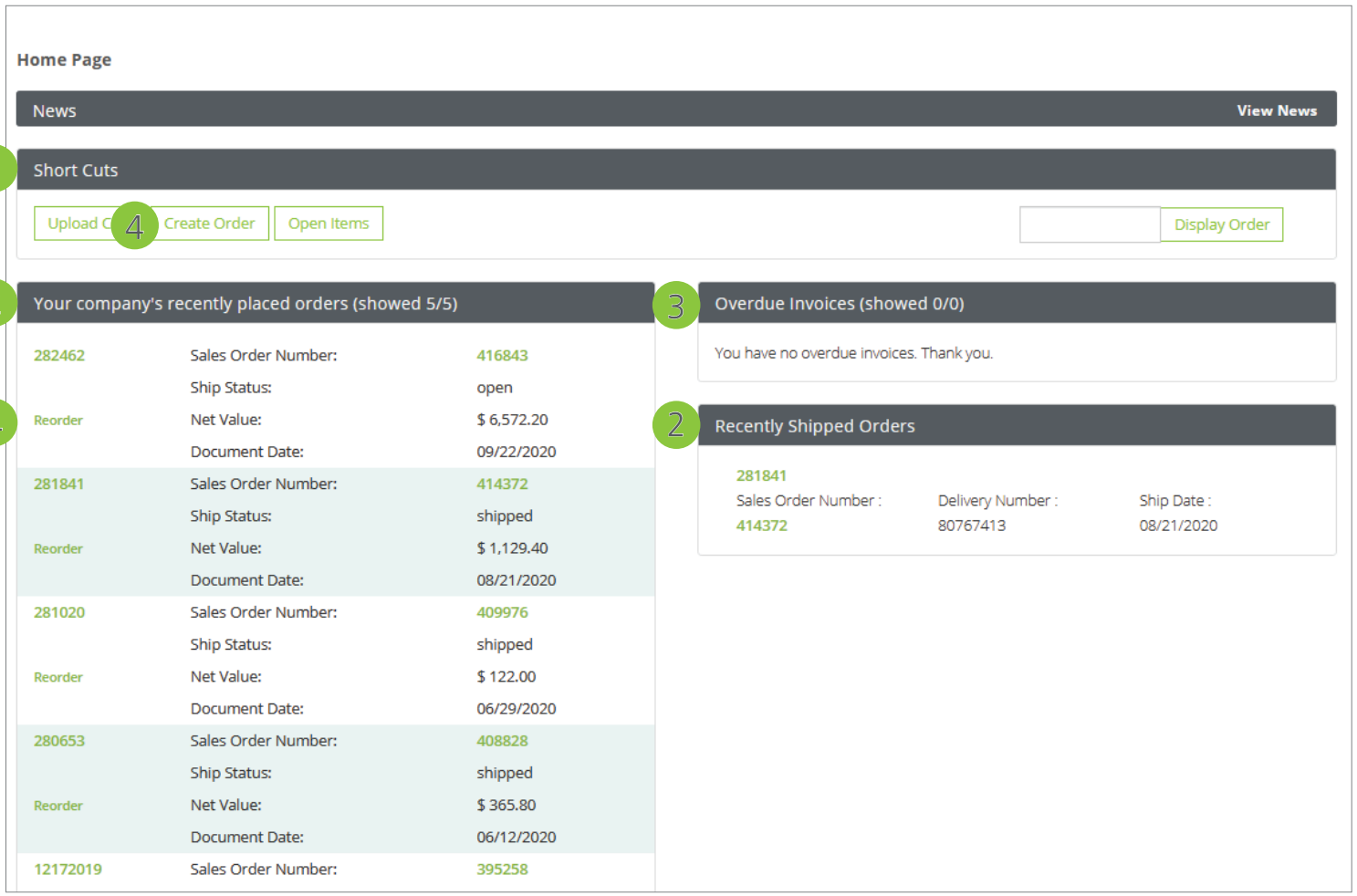


*Image enlarged to show detail

View your Account Details in one easy place

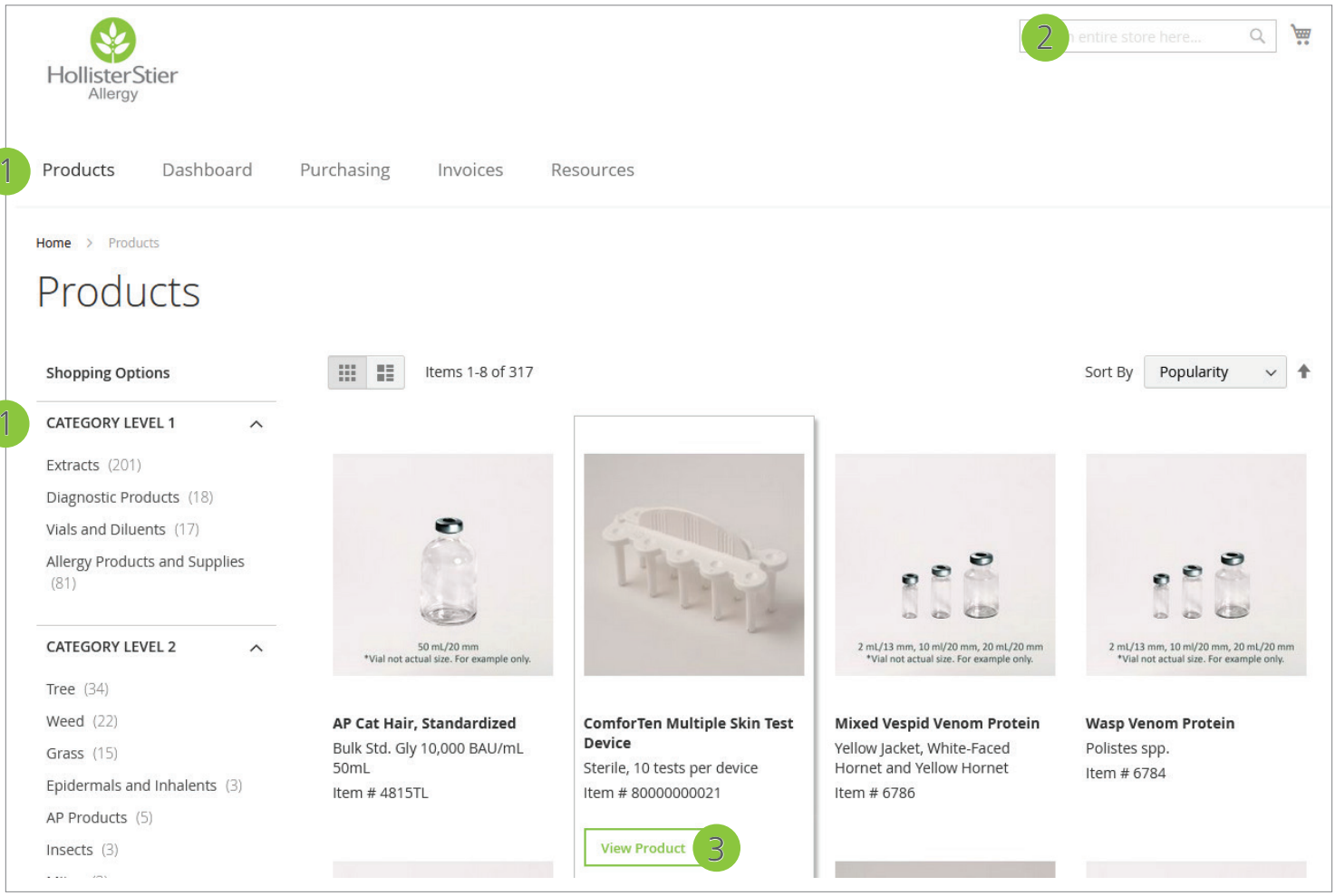
1. Shortcuts include some of our most popular features: Upload Cart, Create Order, Open Items, and Display Order (order number required).
2. Quickly find recently placed orders & shipped orders.
3. View overdue invoices.
4. Create an order from scratch or select Reorder from recently placed orders to add all items included in that order to the cart.



Online Product Catalog Overview

Quickly access the catalog by clicking on the Products tab from any page

1. Filter & find items by product categories.
2. Search for specific products in the search bar to quickly find exactly what you are looking for.
3. Click on items to view product details & availability.



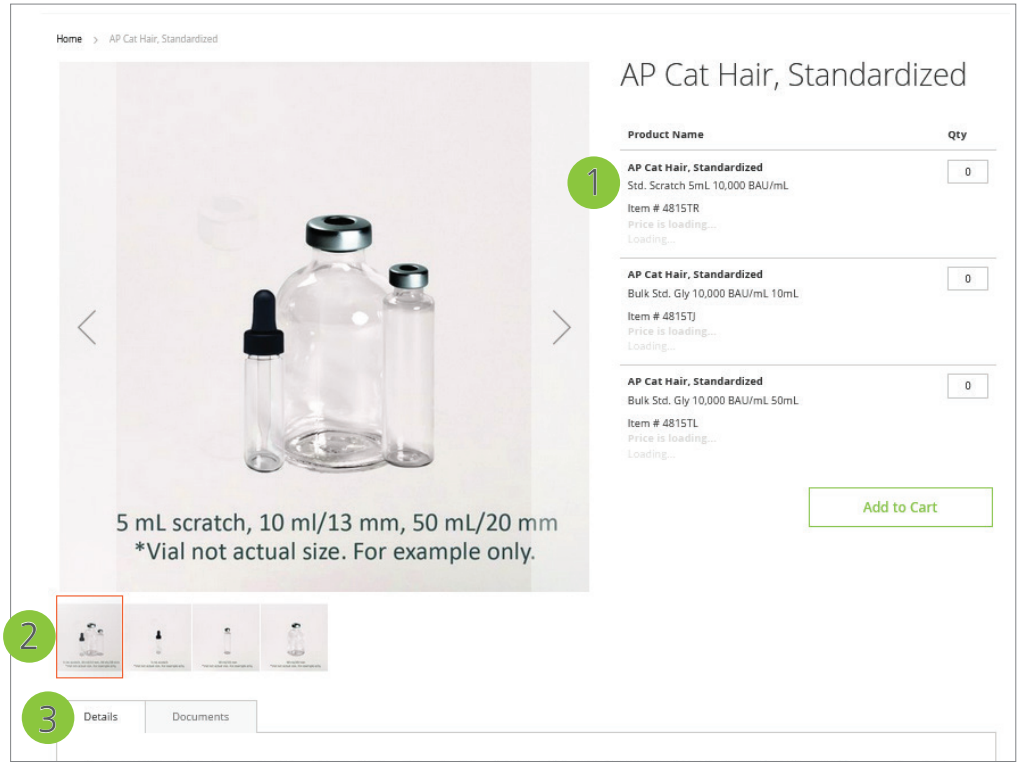
Product Details

Overview

1. View products sizes, pricing & availability.
2. The photo carousel allows you to scroll through images of available product sizes.

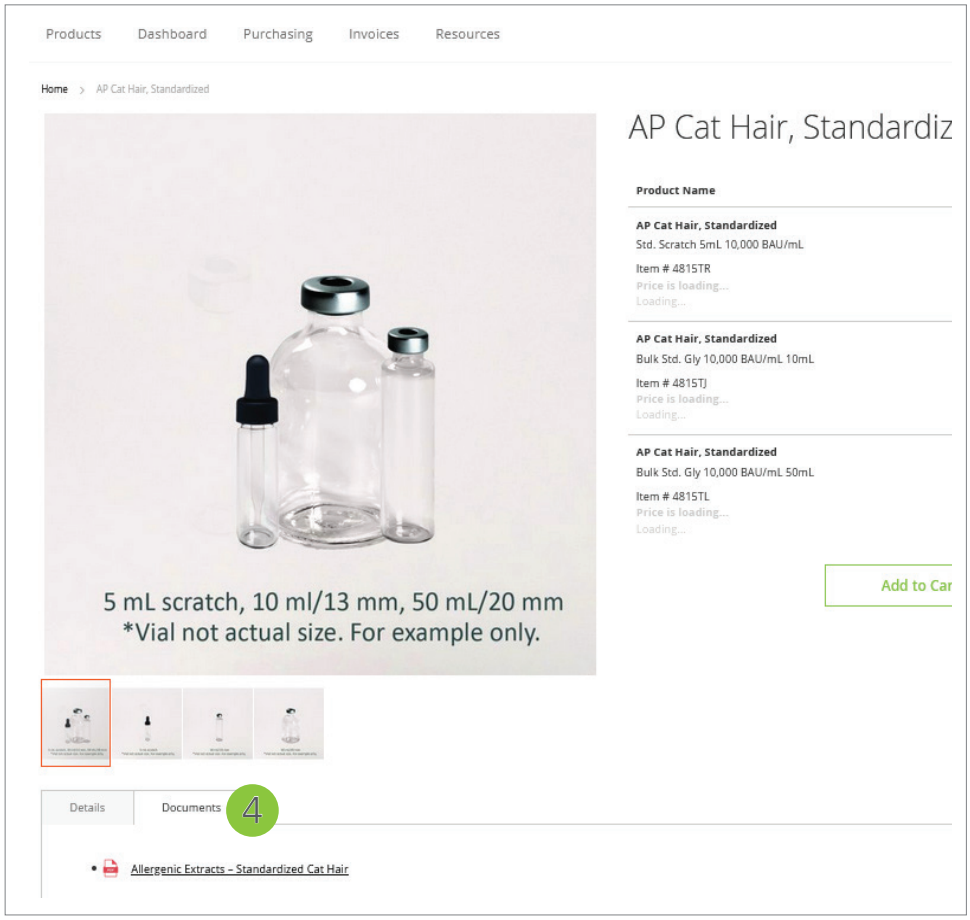
Details

3. A full product description is available in the Details tab.



Documents

4. View & download PDF versions of product inserts.



Ordering Tips

What's the quickest way to add items to my cart?

- The Quick Add feature is the fastest way to search for and add new items to your cart. More details can be found on Page 7.
- There are several ways to quickly add multiple items to your cart. You can add them directly from the cart, via Recently Ordered Items, or by copying a previous order. Instructions for all three of these methods can be found on pages 8-11.

I want to reorder a previous order. What is the easiest way?

- Use the Copy Order function. See page 8 for instructions.

I want to organize my orders by category (venom, diagnostics, etc.) for quick reorder. Is there a way to do that?

- Use the My Favorites function to save items together for quick reordering. Further instructions are available on pages 12-13.

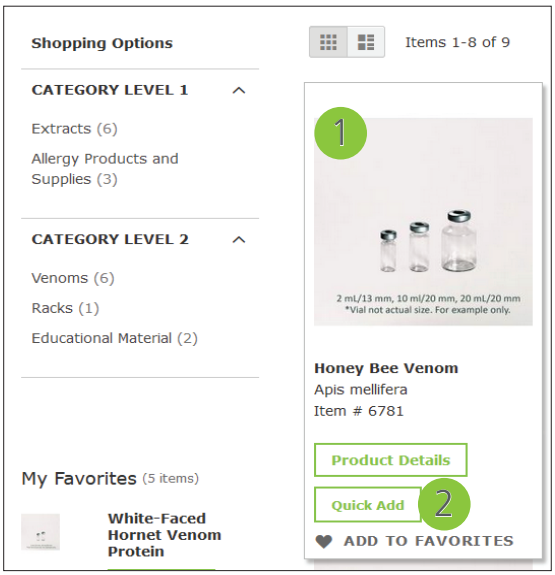
I'm placing a larger order. What's the fastest way to create it?

Uploading a CSV file is the fastest way to enter a large order. Further instructions are available on pages 13-17.

- Need help finding product item codes quickly? Visit www.hsallergy.com/ordering to view the online version of our product catalog. Printed copies are also available. Please contact your sales representative or customer service for more information.

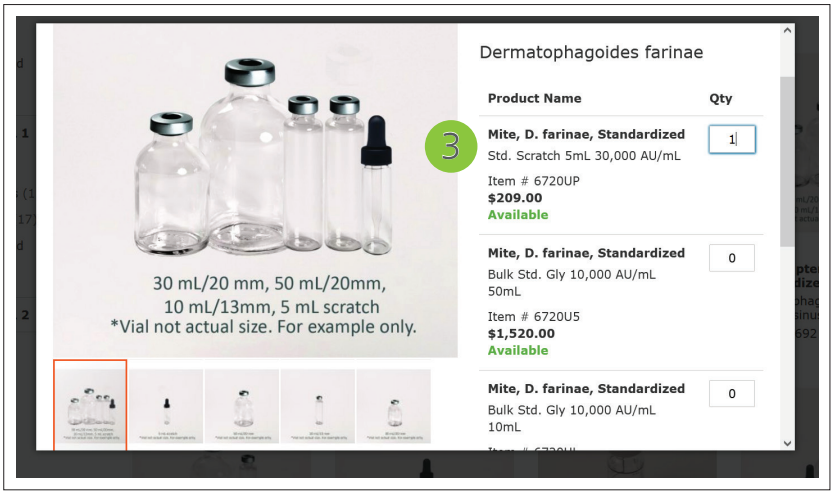
Quick Add: From Product Search

1. **Search for the desired product. From the search results, hover over the item you want to purchase.**



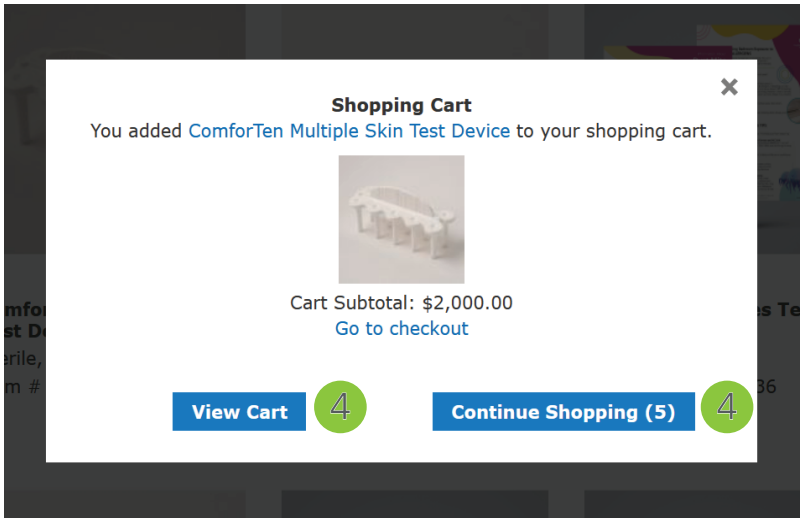
2. **Click Quick Add to add the item to your cart.**

3. **For products that are available in multiple sizes, a pop-up with all available sizes will appear. Add your desired quantity, then click Add to Cart.**



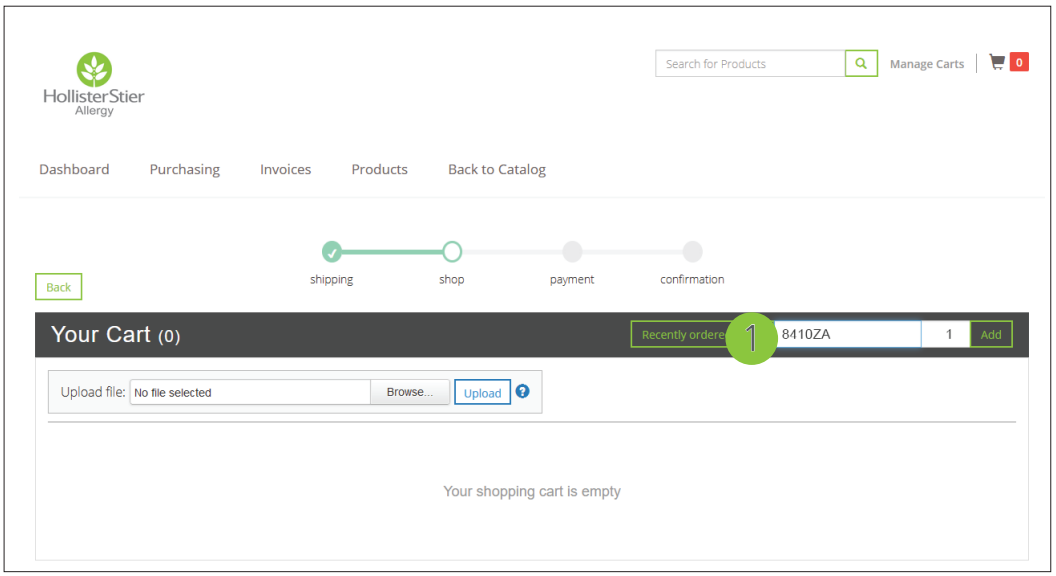
4. **A confirmation will pop up on the screen. From there you can view your cart or continue shopping.**

   - **The pop-up screen closes in 5 seconds and will automatically return you to your product search results.**

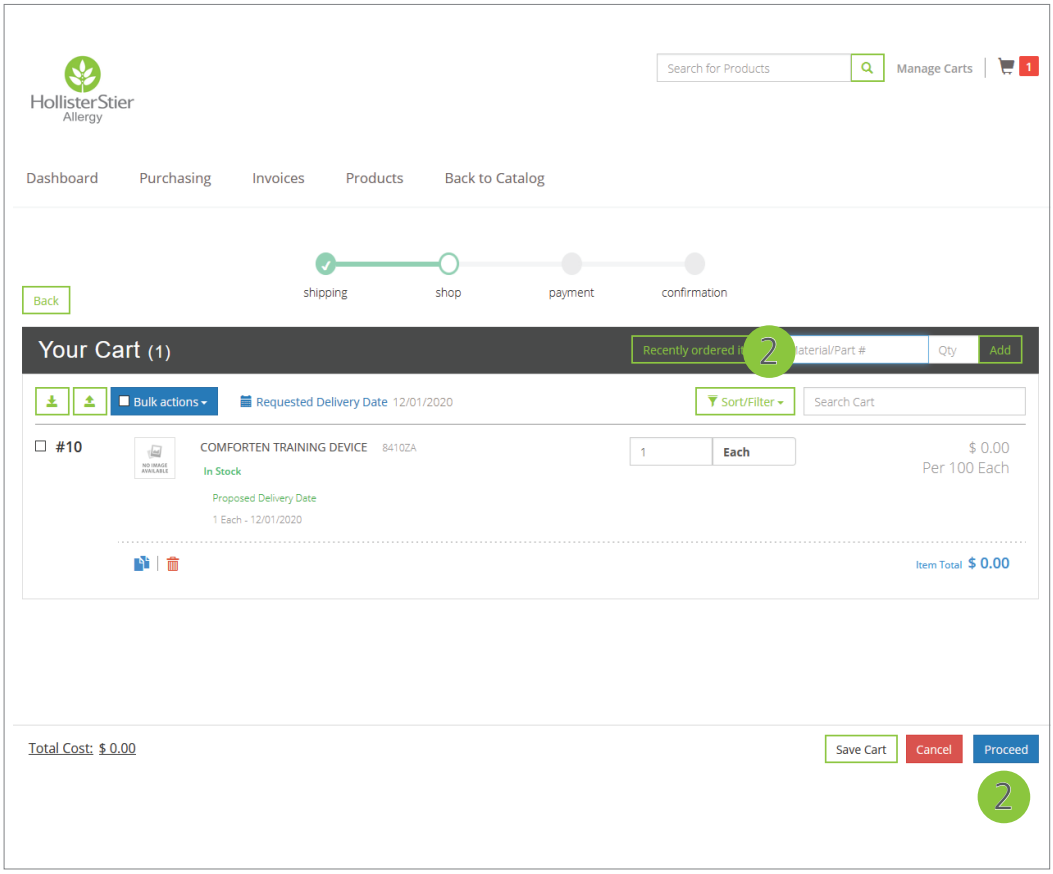


Quick Add: From Your Cart

1. **From your Cart, enter the Item # and Quantity in the white box next to Recently ordered items. Then click Add.**



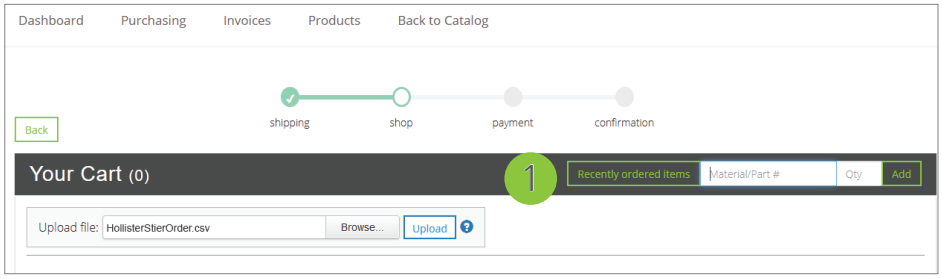
2. **The item and price will populate in the cart. From there you can add more items or click Proceed to place your order.**



Quick Add: Recently Ordered Items

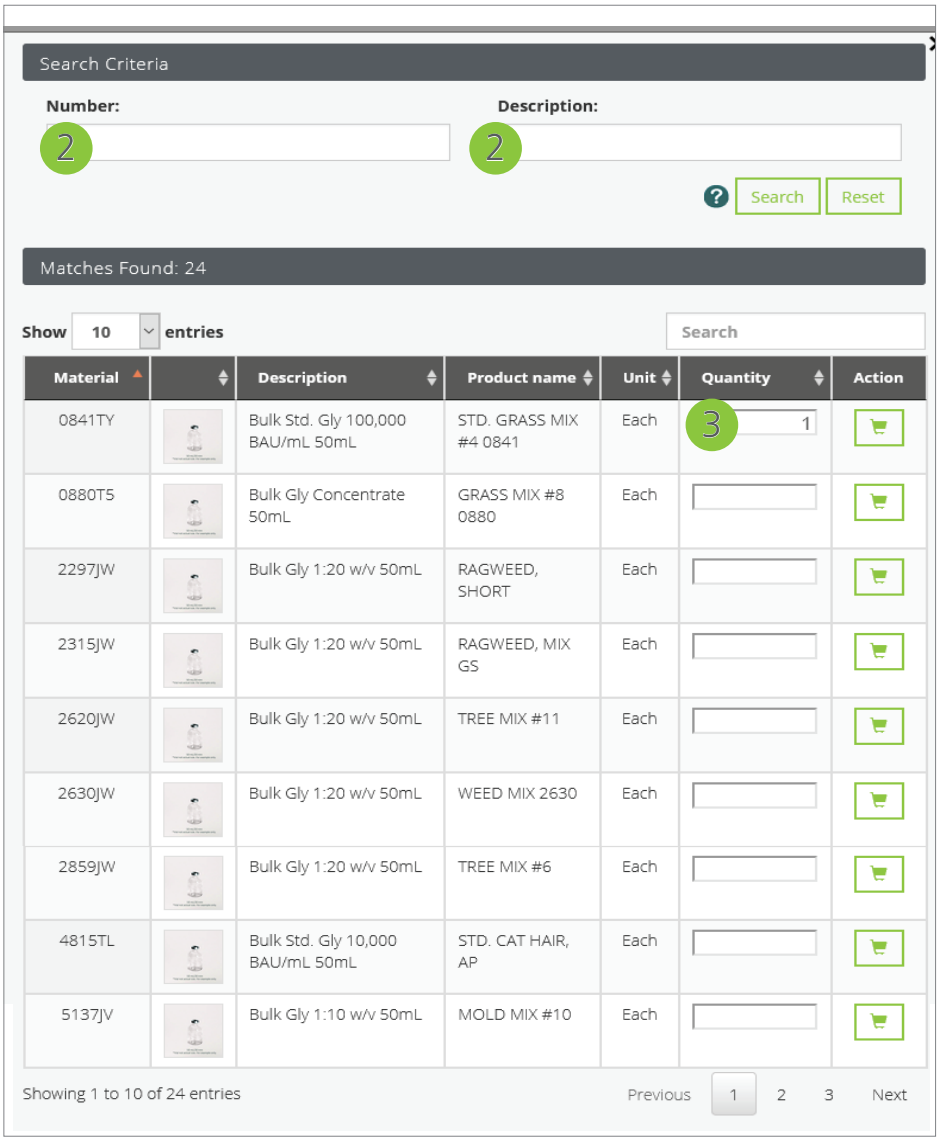
Quickly add recently ordered items to your cart.

1. **Navigate to your cart. Inside the cart you will find the Recently Ordered Items button. Click on it.**



2. **A screen will pop-up with a list of recently ordered items. You can scroll to view items, search for a product code in the Number box, or search a key word in the Description box.**

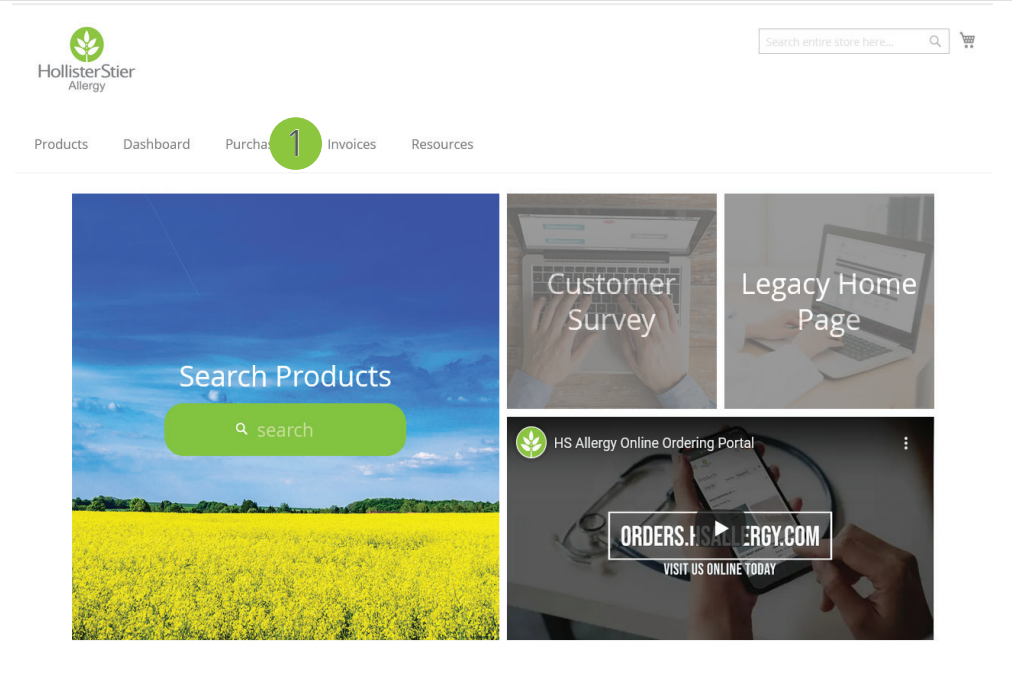
3. **Select an item by entering the Quantity, then click the cart icon to add the item to your cart.**



Quick Add: Copy a Previous Order

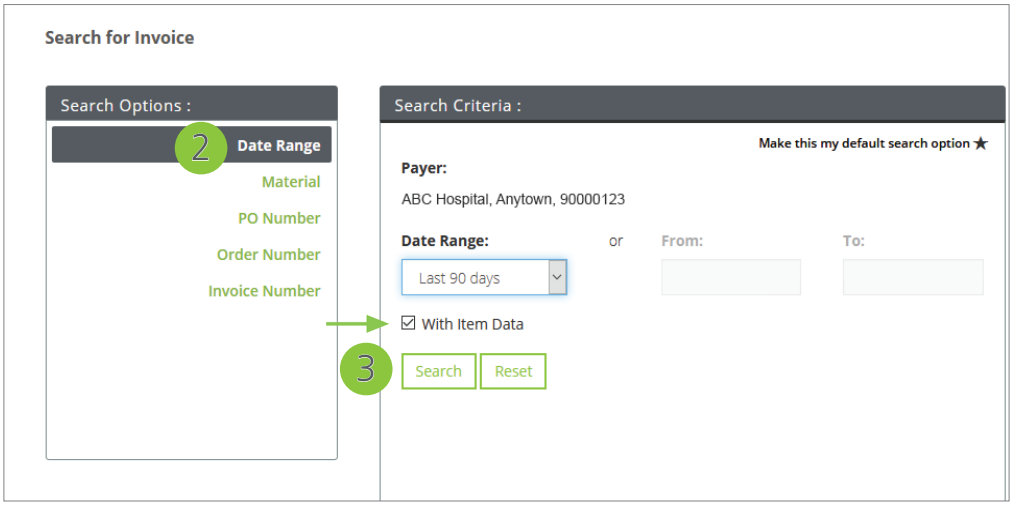
1. **From the Home Screen click Invoices. Then click Search for Invoice.**

   - **Your cart must be empty for the Copy Order function to work.**



2. **There are several Search Options available to help you find your order. For this example we are using the Date Range.**

   - **Make sure you click the With Item Data checkbox.**

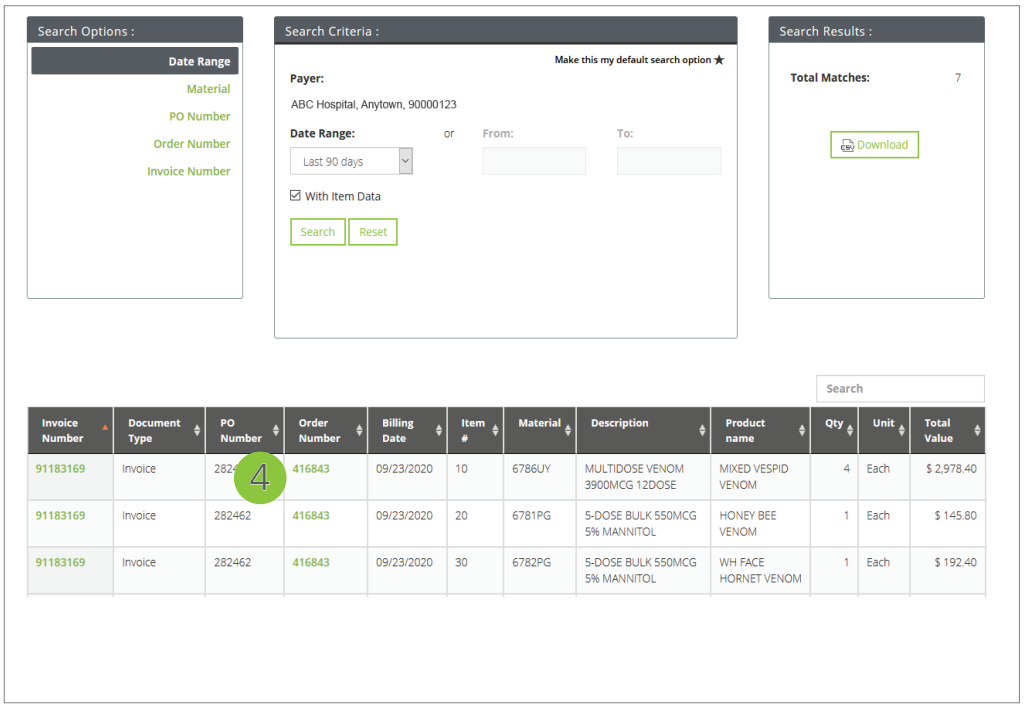


3. **Click Search.**

Quick Add: Copy a Previous Order

4 Click on the Order Number you want to copy.

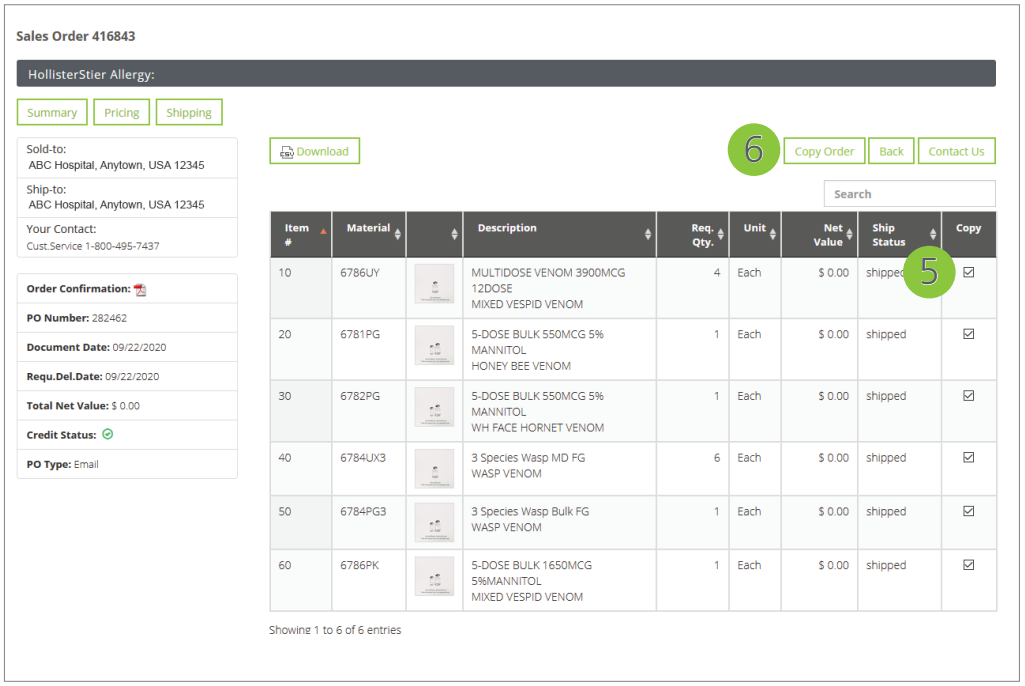
- The Copy feature is not available if you click on the Invoice



Invoice Number	Document Type	PO Number	Order Number	Billing Date	Item #	Material	Description	Product name	Qty	Unit	Total Value
91183169	Invoice	282	416843	09/23/2020	10	6786UY	MULTIDOSE VENOM 3900MCG 12DOSE	MIXED VESPID VENOM	4	Each	$ 2,978.40
91183169	Invoice	282462	416843	09/23/2020	20	6781PG	5-DOSE BULK 550MCG 5% MANNITOL	HONEY BEE VENOM	1	Each	$ 145.80
91183169	Invoice	282462	416843	09/23/2020	30	6782PG	5-DOSE BULK 550MCG 5% MANNITOL	WH FACE HORNET VENOM	1	Each	$ 192.40

5 The previous order will populate on the screen. All items are selected by default. If there are items you don't want to copy, click the checkbox under Copy to deselect them.

6 Next, click the Copy Order button. The items will be added to your cart.

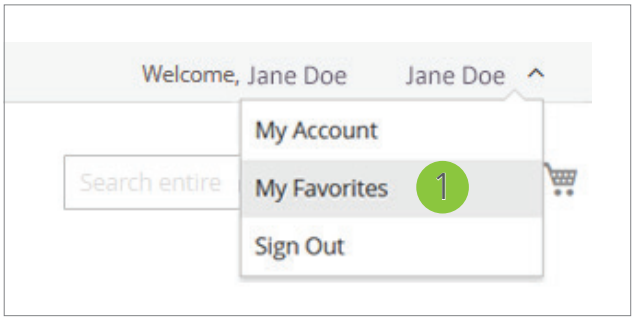


Item #	Material		Description	Req. Qty.	Unit	Net Value	Ship Status	Copy
10	6786UY		MULTIDOSE VENOM 3900MCG 12DOSE MIXED VESPID VENOM	4	Each	$ 0.00	shipped	☑
20	6781PG		5-DOSE BULK 550MCG 5% MANNITOL HONEY BEE VENOM	1	Each	$ 0.00	shipped	☑
30	6782PG		5-DOSE BULK 550MCG 5% MANNITOL WH FACE HORNET VENOM	1	Each	$ 0.00	shipped	☑
40	6784UX3		3 Species Wasp MD FG WASP VENOM	6	Each	$ 0.00	shipped	☑
50	6784PG3		3 Species Wasp Bulk FG WASP VENOM	1	Each	$ 0.00	shipped	☑
60	6786PK		5-DOSE BULK 1650MCG 5%MANNITOL MIXED VESPID VENOM	1	Each	$ 0.00	shipped	☑

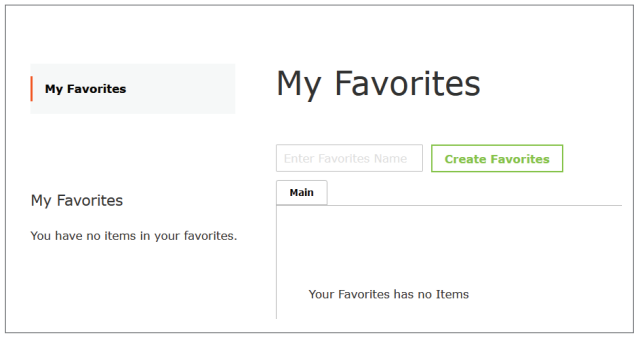
My Favorites: Creating Lists

My Favorites allows you to save custom lists of products for quick reordering.

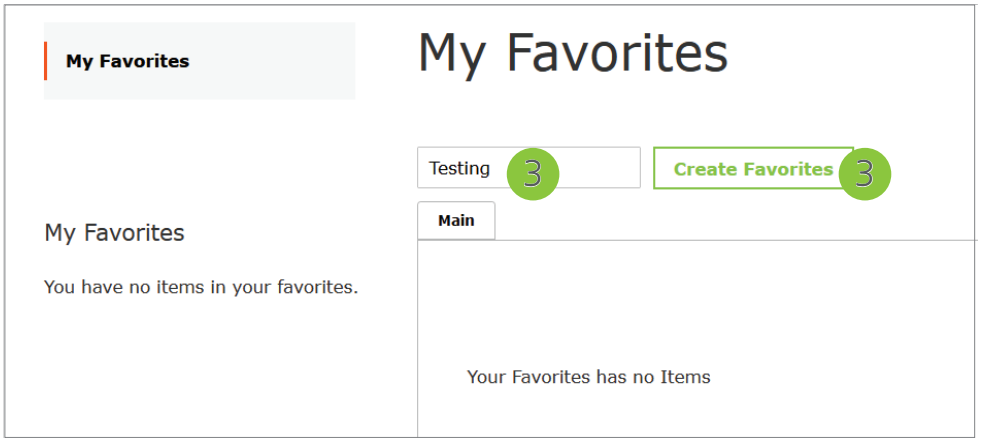
1. From any screen, click the down arrow near your name in the upper right corner. Then click on My Favorites.



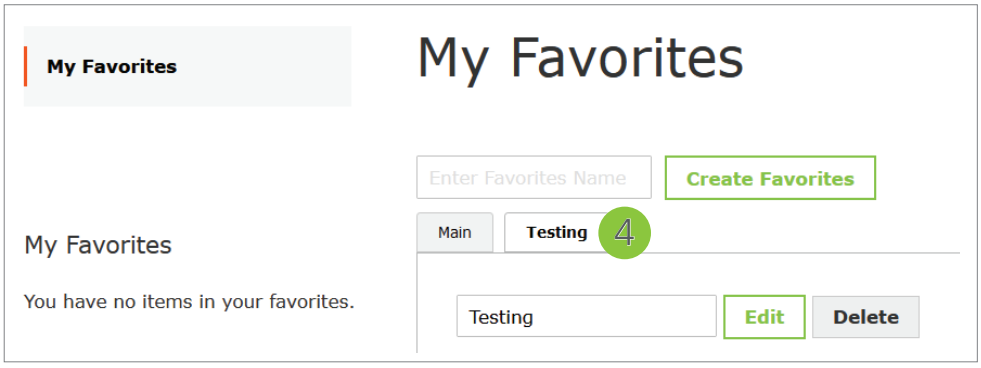
2. The My Favorites screen will load. If you haven't set up any Favorites yet, it will be blank.



3. To create a new Favorites list, type the desired name of the group into the text box. Then click Create Favorites.



4. Your new Favorites list will be added. From there you can create more lists or start adding items to the list.

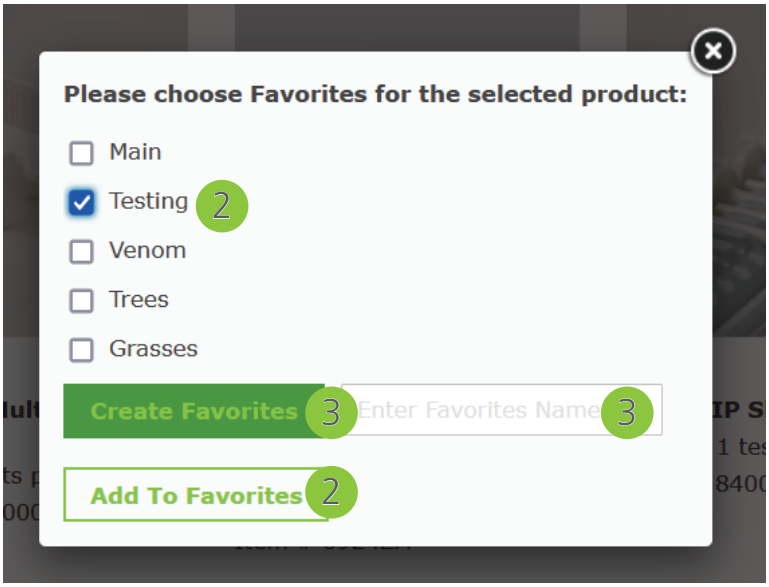


My Favorites: Adding Products to Lists

1. **Search for your desired product in the search bar. Hover over the product you want to select, then click Add to Favorites.**

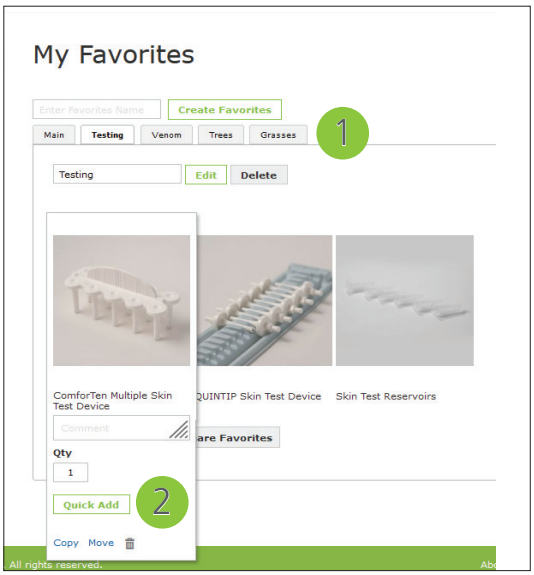
2. **Select the appropriate Favorites list, then click Add to Favorites.**

3. **You can also create a new Favorites list by typing the new Favorites list name into the text box. Then click Create Favorites. The product will save to the new list.**



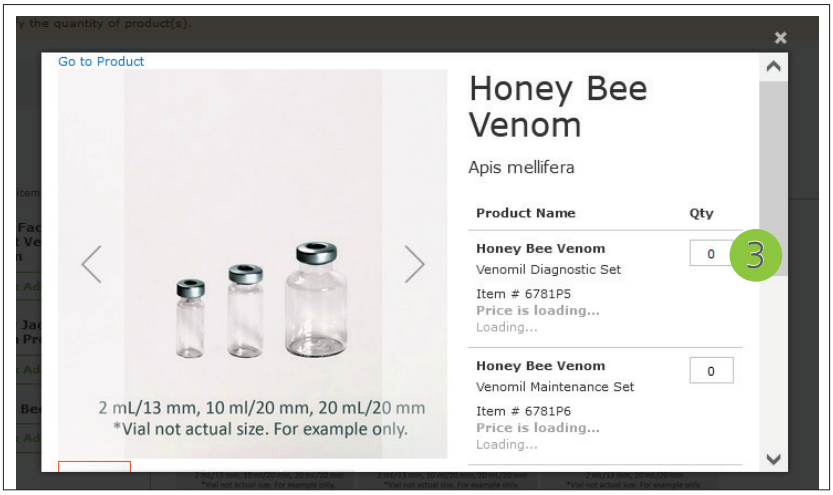
My Favorites: Adding Products to Cart

1. **Navigate to My Favorites, then select the list you want to order products from.**



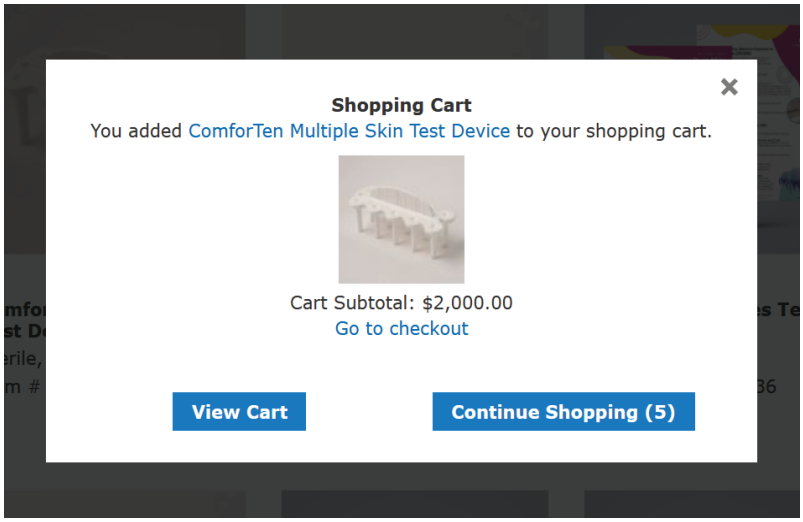
2. **Hover over the desired product, adjust the quantity, then click Quick Add.**

3. **For products that are available in multiple sizes, a pop-up with all available sizes will appear. Add your desired quantity, then click Add to Cart.**



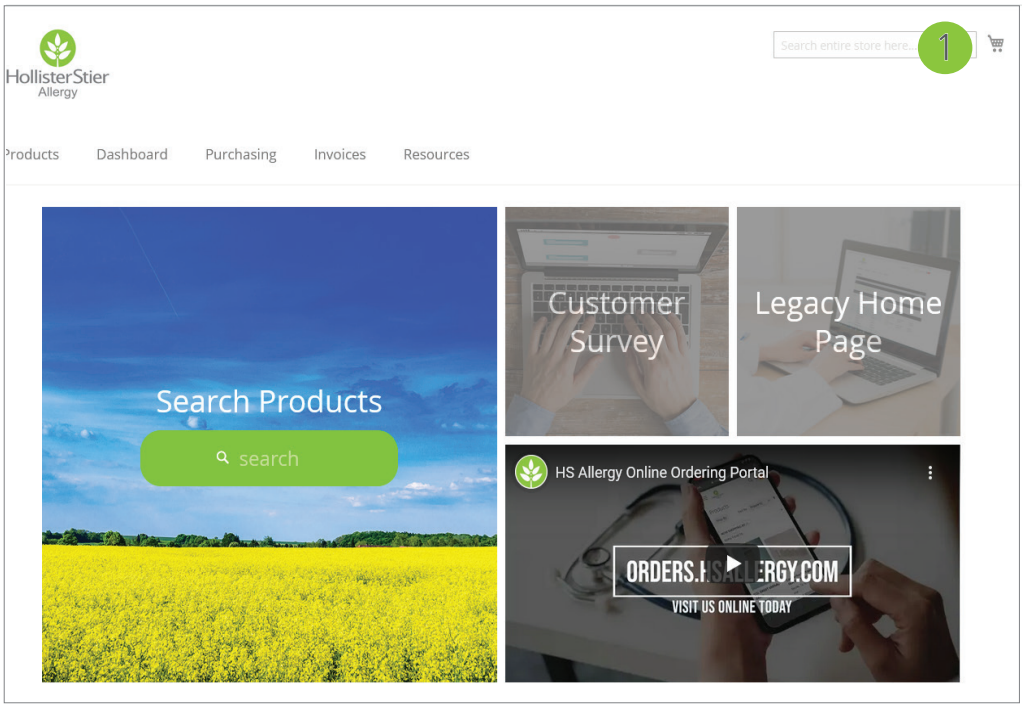
4. **A confirmation will pop up on the screen. From there you can view your cart or continue shopping.**

   - **The pop-up screen closes in 5 seconds and will automatically return you to your Favorites.**



Finding Saved Carts

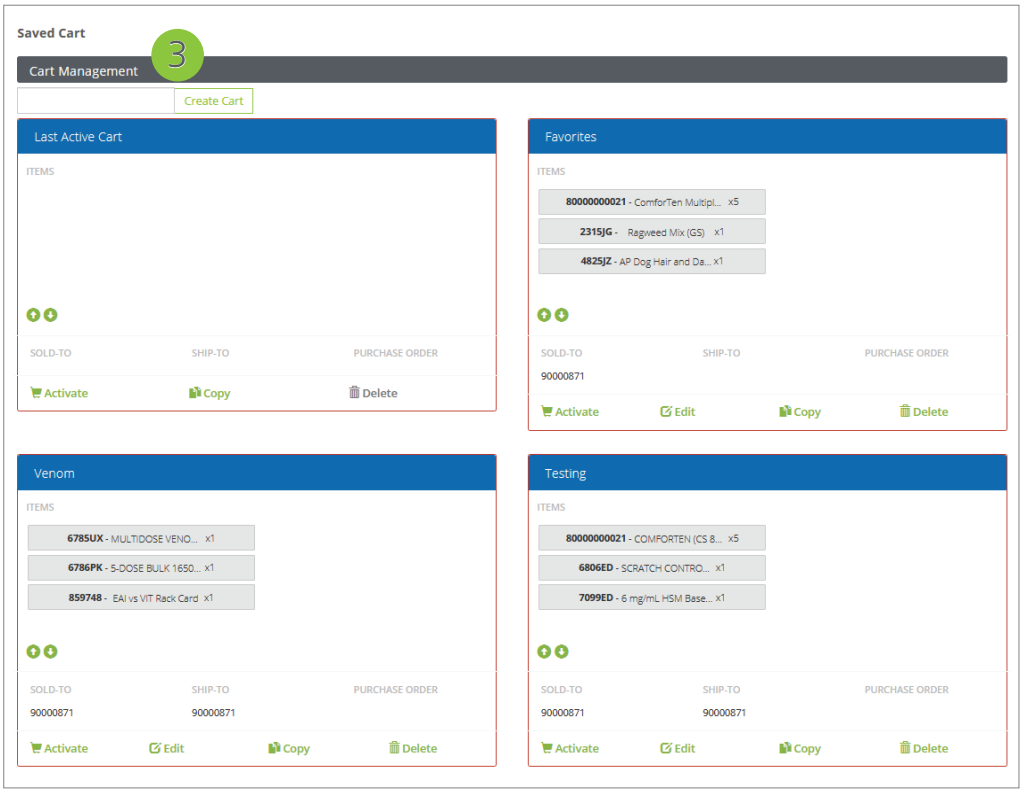
1 From the Home Screen click the cart icon.



2 In the upper right corner click Manage Carts.

3 On the Cart Management screen you can view all of your saved carts.

- Click ACTIVATE to add all of the cart items to your current cart.
- Click EDIT to change the cart name.
- Click COPY to start a new cart with those items.
- Click DELETE to remove the saved cart from your account.



CSV File Overview

What file format is required?

- Our ordering system supports the comma separate value (CSV) format (valid separators are “,” and “;”). This is different than an excel format (*xls or *xlsx).

What columns do I need to include?

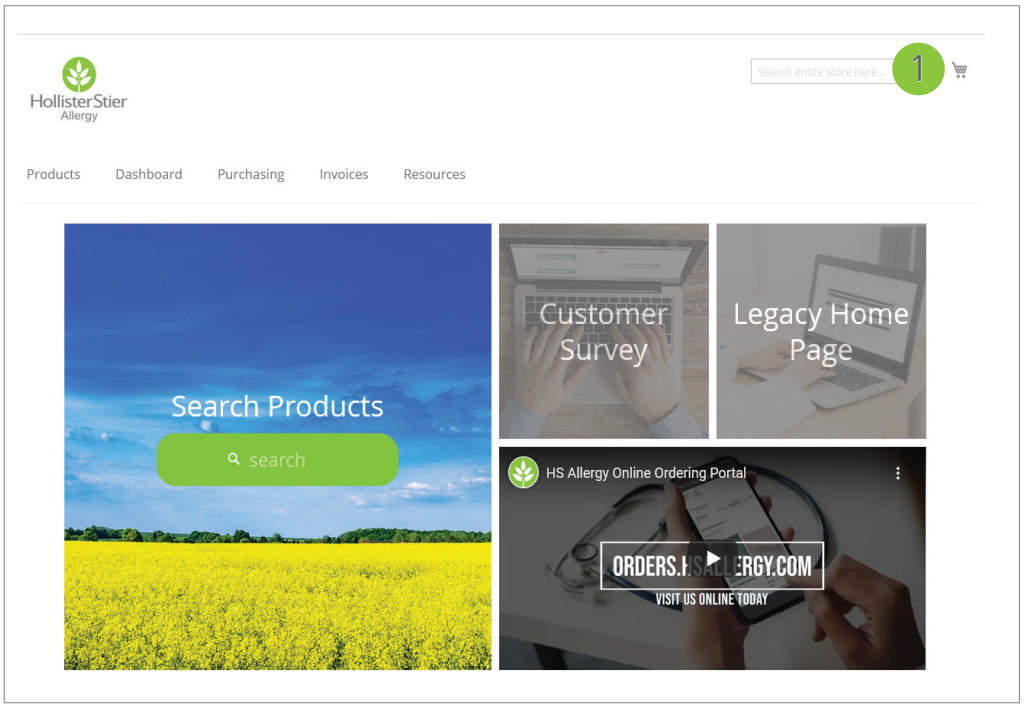
- Material/Product number. (Required)
- Order quantity. (Required)
- Requested ship date. (Optional - will default to the earliest date) Please note that if provided, the requested ship date should be in the date format specified in your User Profile.

Where can I download a sample CSV file?

- Navigate to empty your Cart, then click the question mark icon.
- A pop-up screen with instructions and a link to download a sample CSV file will appear.

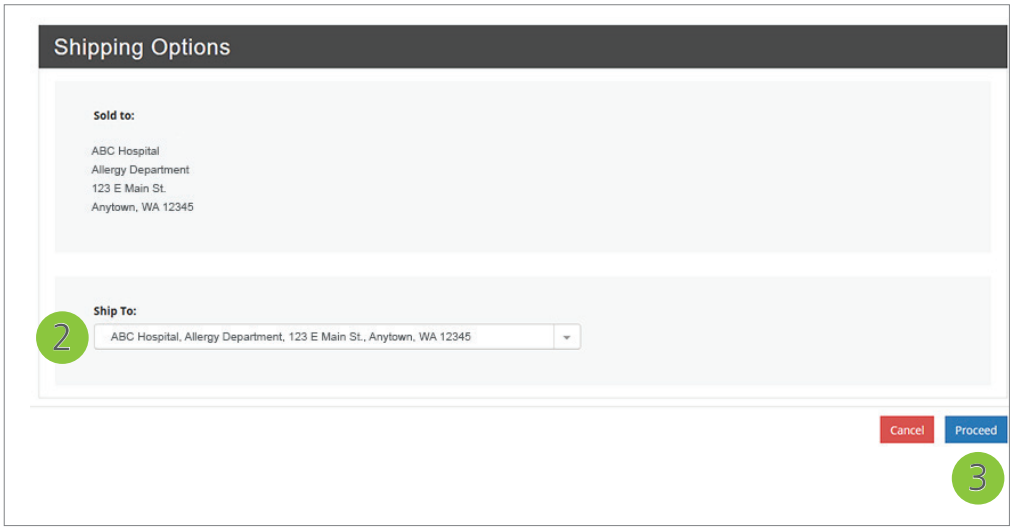
Upload Orders via CSV

1 **From the Home Screen click the Cart icon.**

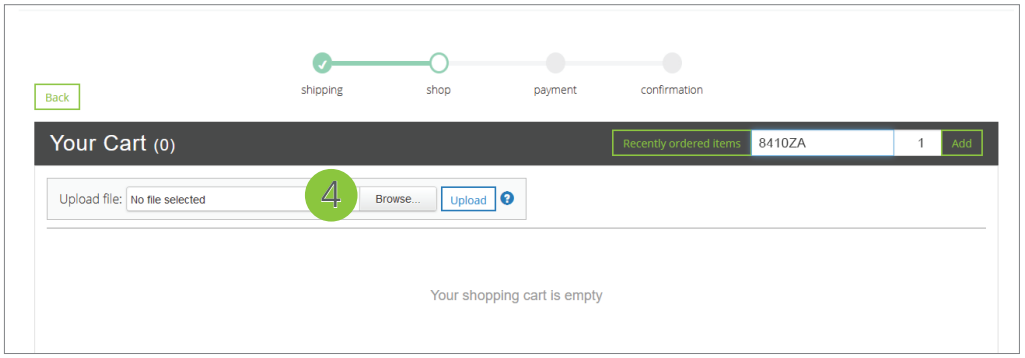


2 **Select the Ship To address from the drop down.**

3 **Click Proceed. This will take you to your Cart.**

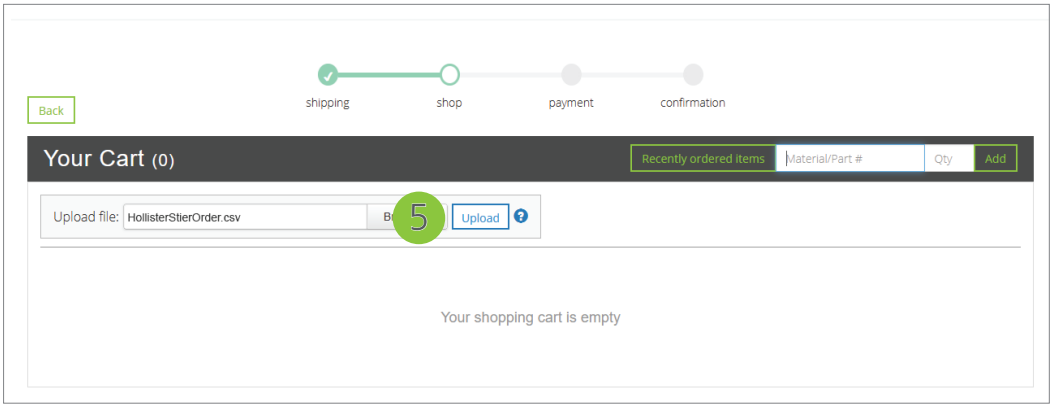


4 **Click Browse to search for your CSV file. Select the file you want to upload, then click Open.**

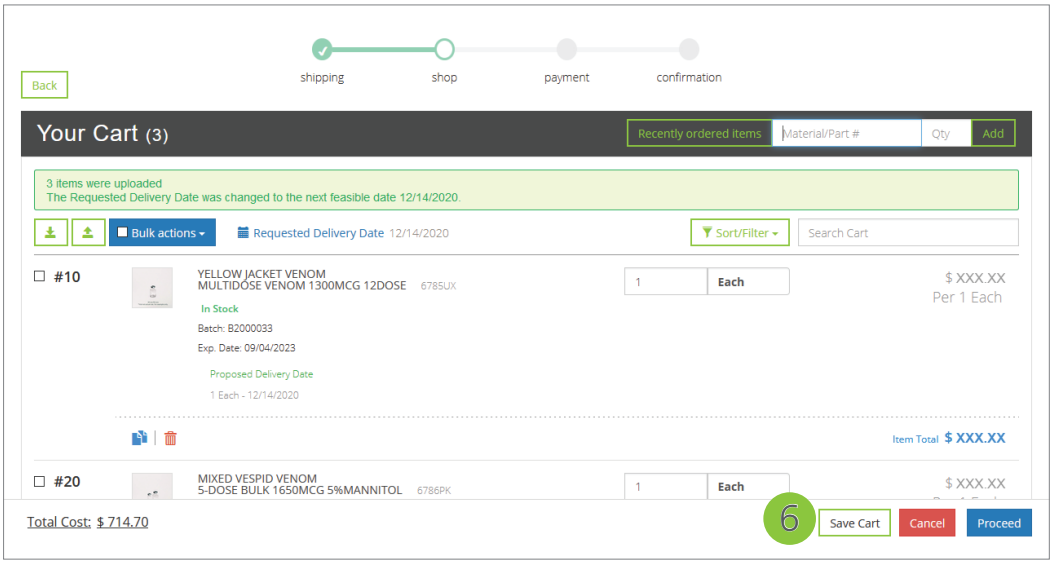


Upload Orders via CSV

5 **Click Upload.**

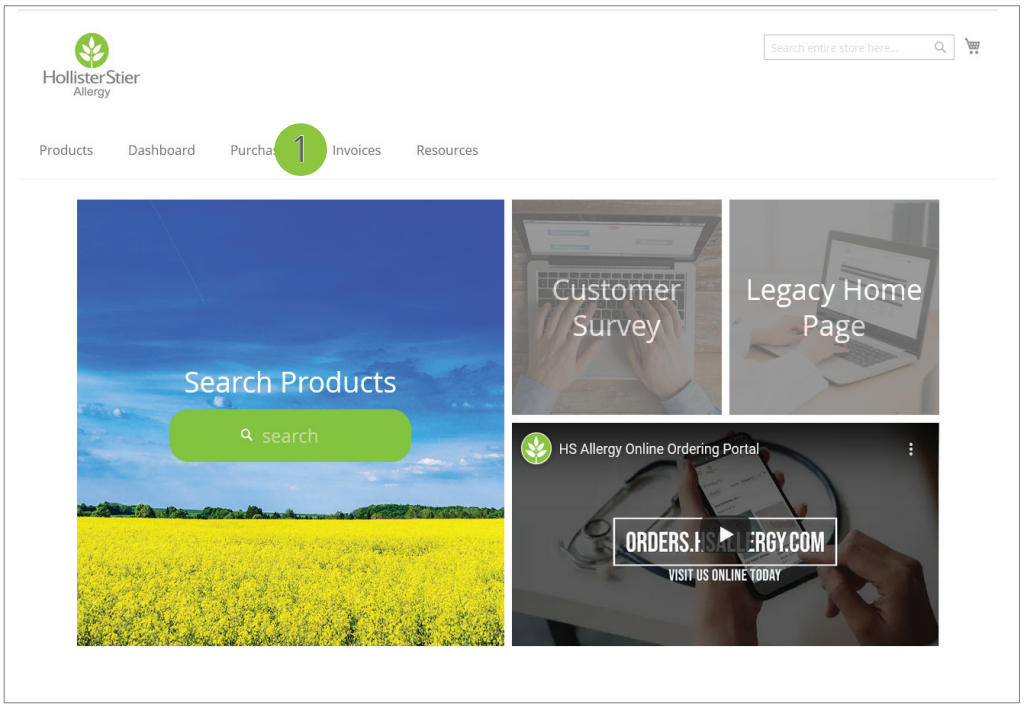


6 **Your order will appear in your cart. From there you can continue to add items, save your cart, or proceed to check out.**



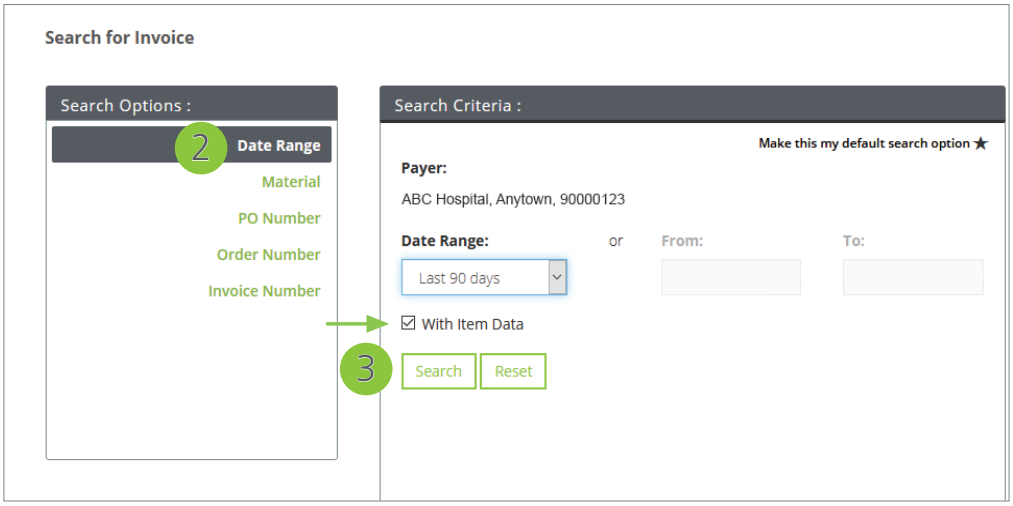
Download Previous Orders as CSVs

1. **From the Home Screen click Invoices.**



2. **There are several Search Options available to help you find your order. For this example we are using the Date Range.**

   - **Make sure you click the With Item Data check box.**

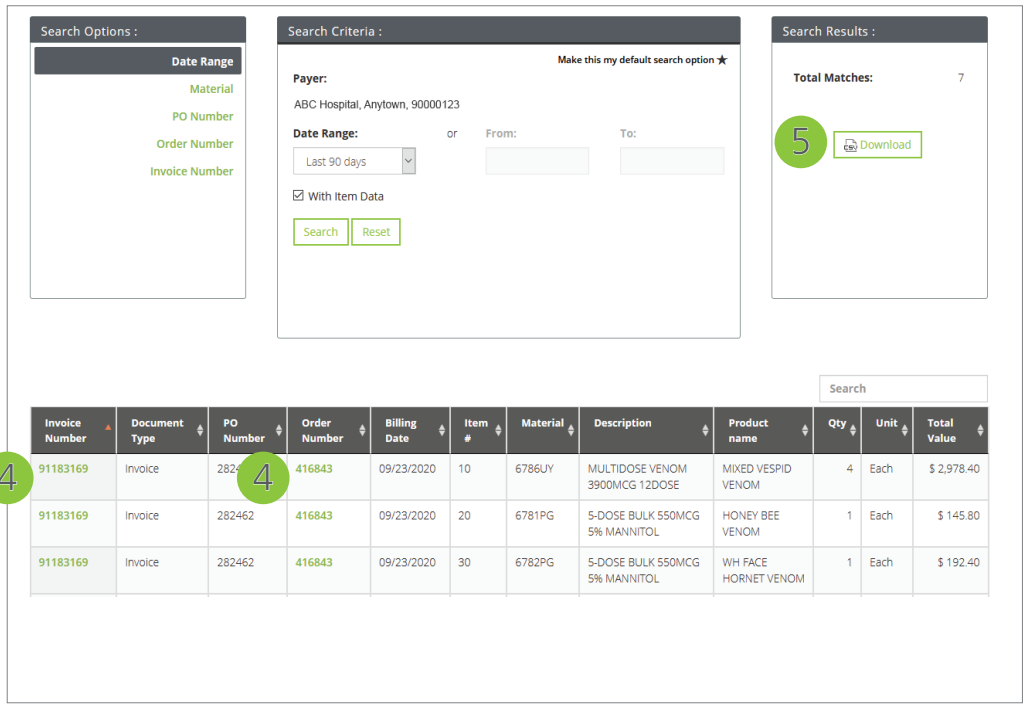


3. **Click Search.**

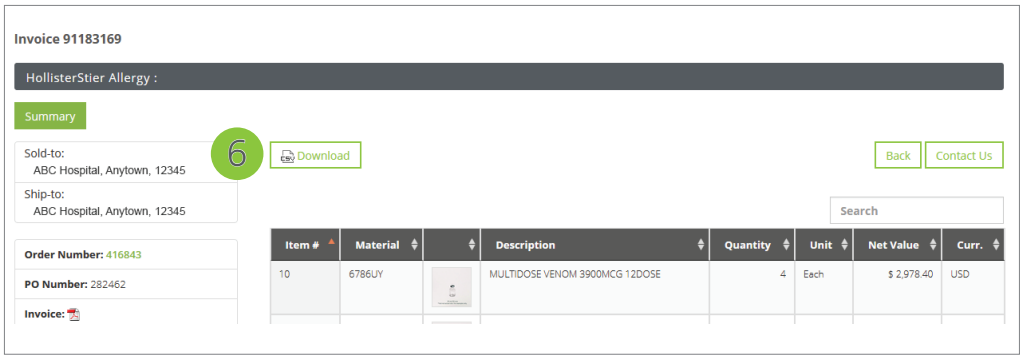
Download Previous Orders as CSVs

4 **Select the Invoice Number or Order Number you want to download the CSV file for.**

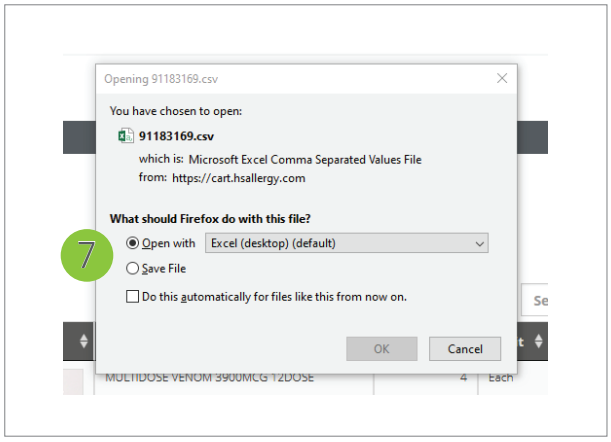
5 *You can also download CSVs for all of your orders by clicking the Download button under Search Results.*



6 **From the Order Details screen click the Download button.**

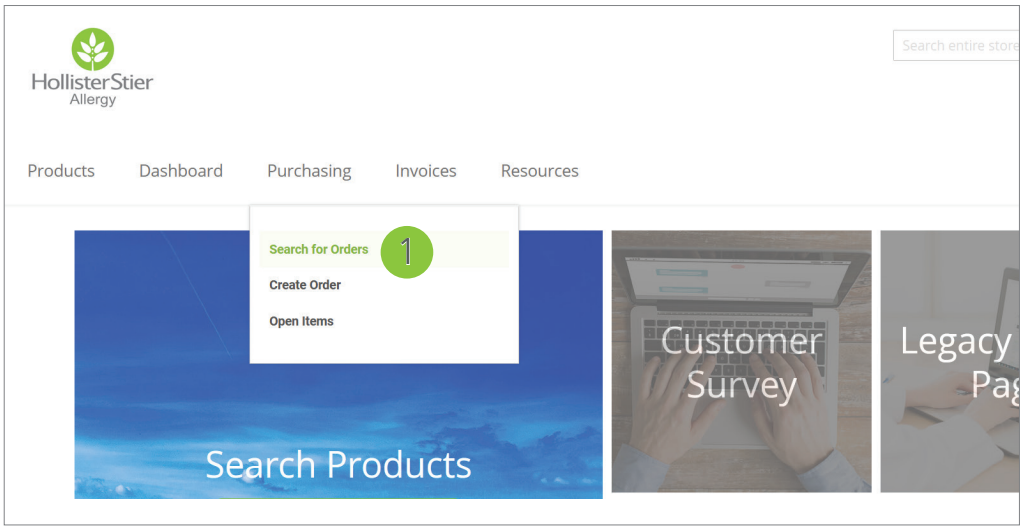


7 **You will be prompted to open or save the file. From there you can make changes to the file, as needed.**



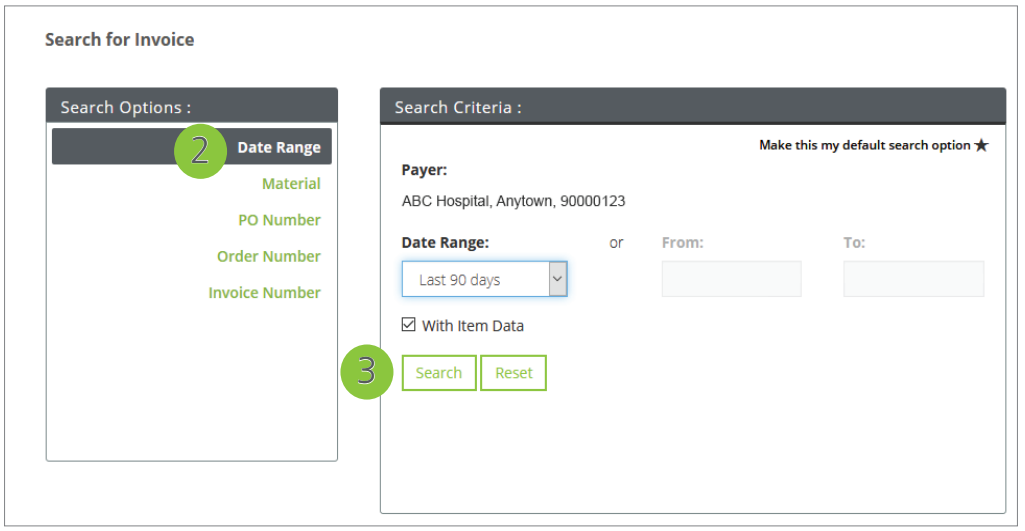
Shipping Details

1. **To find shipping details for a specific order, hover over Purchasing on the home screen. Then select Search for Orders from the drop-down.**

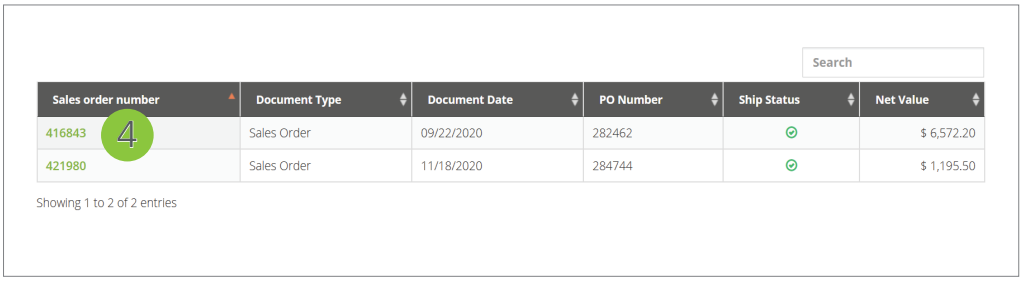


2. **There are several Search Options available to help you find your order. For this example we are using the Date Range.**

3. **Click Search.**

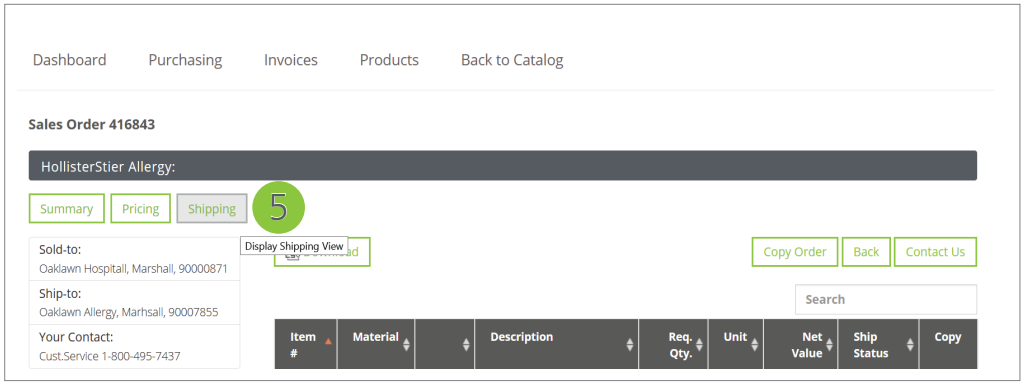


4. **Order details will populate on the next screen. Click the desired Sales order number link.**

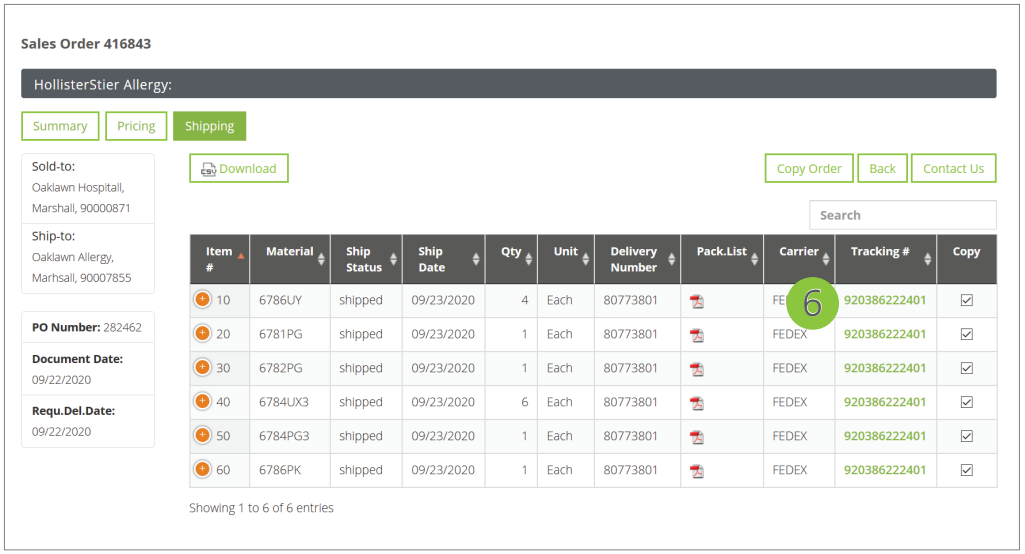


Shipping Details

5 **Next click the Shipping button.**

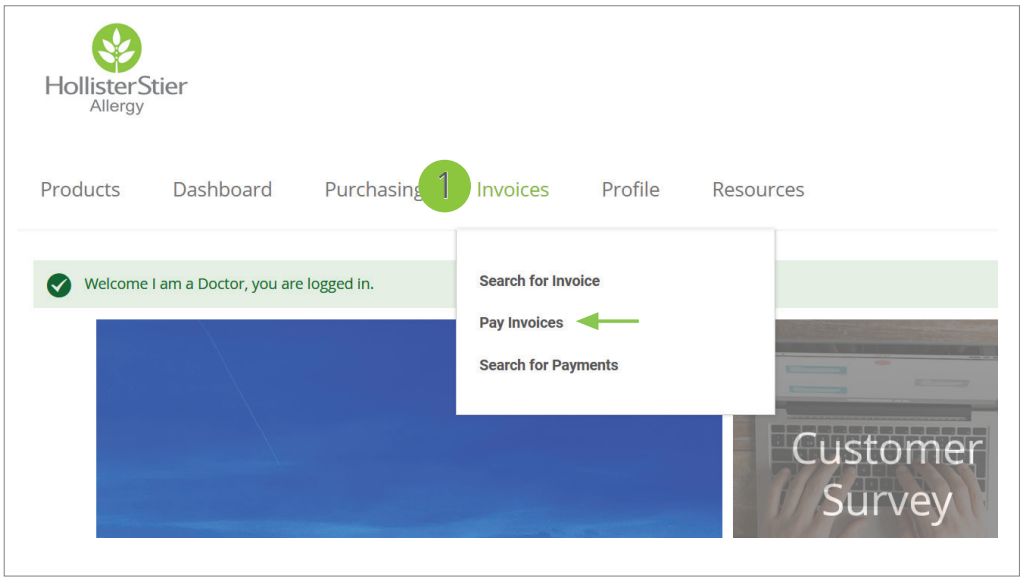


6 **Finally, click the Tracking #. This will redirect you to the shipper's tracking website for specific shipping details.**

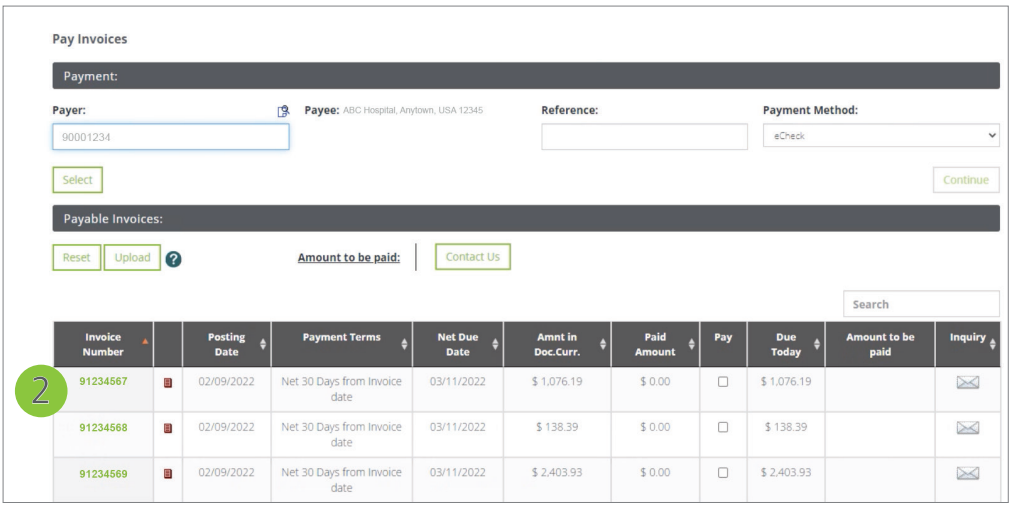


Pay an Invoice

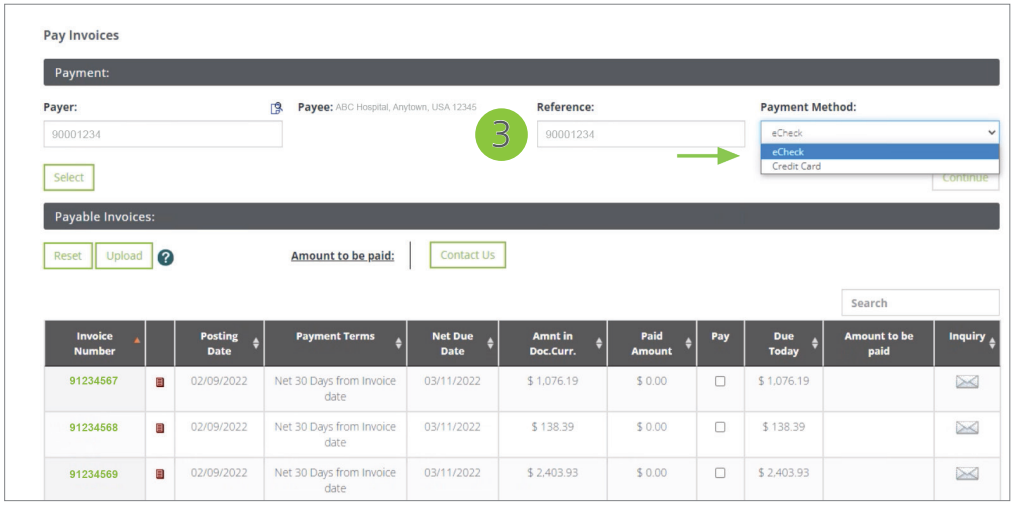
1. **From the Home Screen hover over Invoices. Then click Pay Invoices.**



2. **A list of all your payable invoices will populate.**

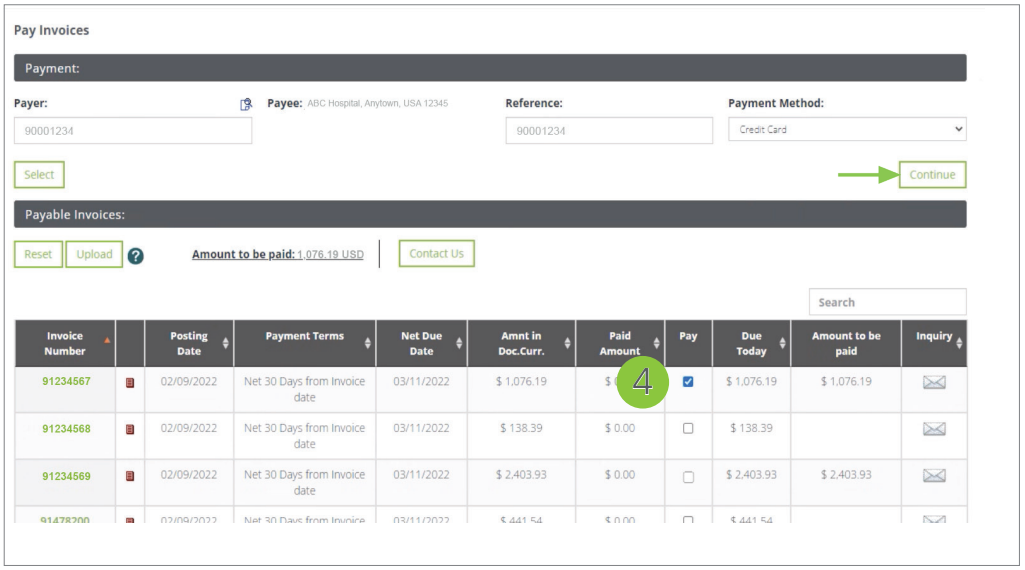


3. **Enter your Payer number in the Reference Field - they should be the same. Then select your desired payment method from the drop down. We will use Credit Card for this example.**



Pay an Invoice

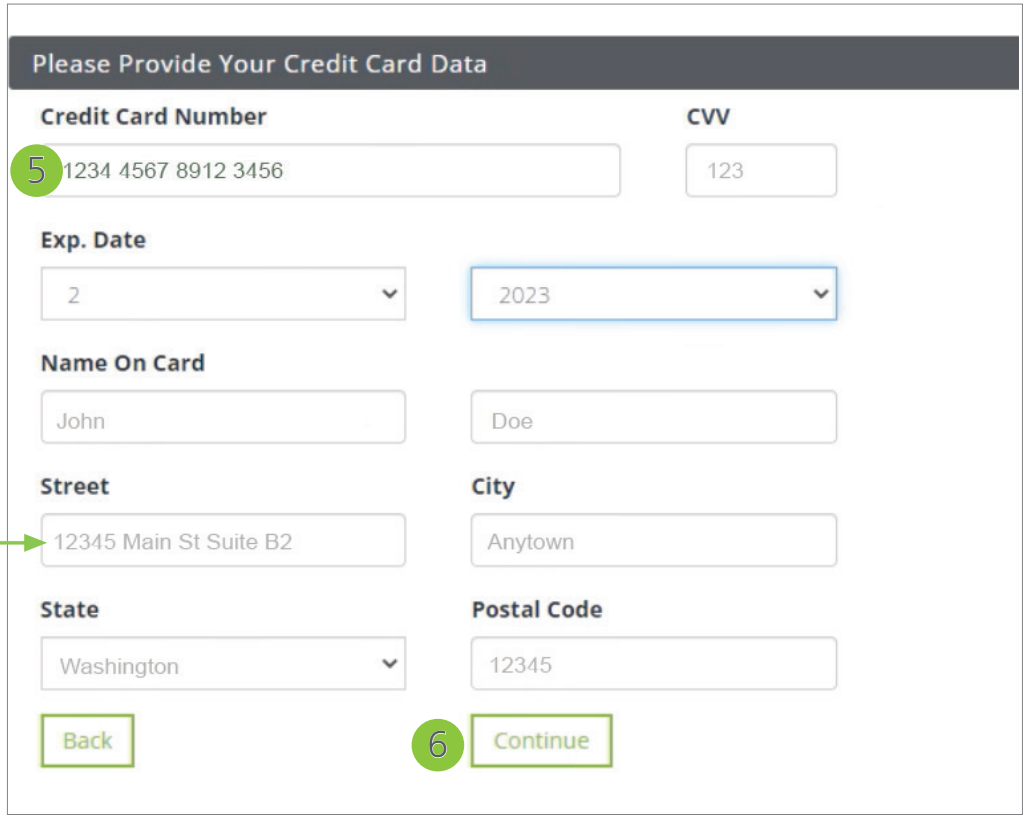
4 **Click the Pay box next to the Invoice(s) you want to pay. Then click Continue.**



5 **Enter your payment and billing information, as applicable.**

- **The address automatically defaults to your account shipping address. Be sure to update it to the billing address, if needed. Otherwise your payment will not process.**

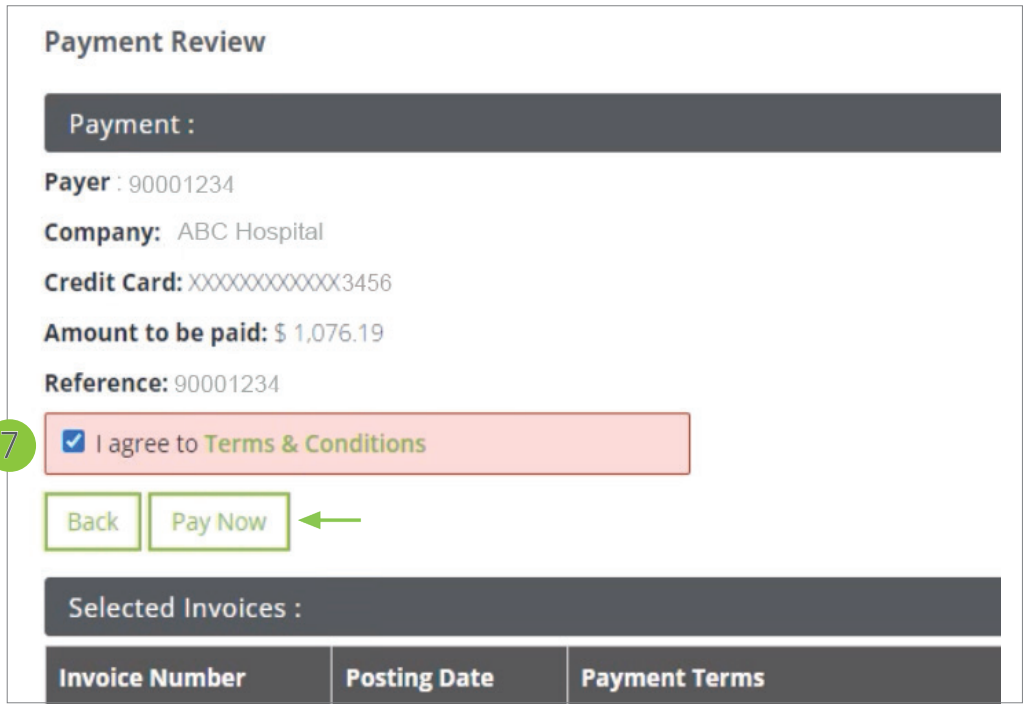
6 **Click Continue.**



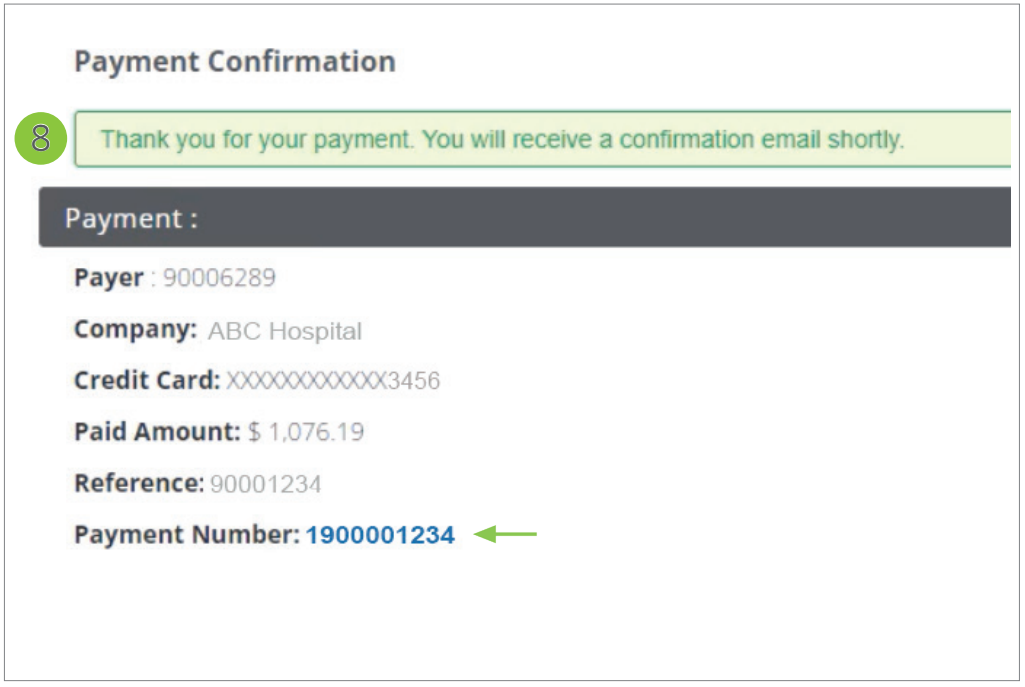
Pay an Invoice

7 **Review your payment details, then check the box next to the Terms & Conditions agreement. Then click Pay Now.**

- **Click the Terms & Conditions hyperlink text to view full payment term details.**



8 **A payment confirmation will appear on your screen with payment details, including your confirmation number.**



9 **A payment confirmation will also be emailed to you.**

- **If you don't receive the confirmation, check your SPAM folder.**

FAQs

I need help. How can I contact Customer Service?

Our knowledgeable customer service representatives are available Monday-Friday, 6 a.m. to 3 p.m. Pacific Time to answer any questions you have.

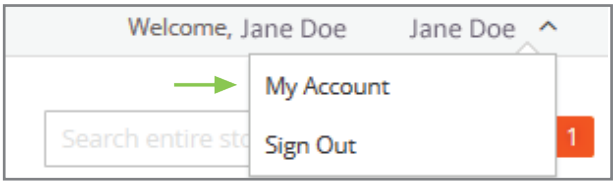
- Phone: 1.800.495.7437
- Fax: 1.800.752.6258
- Email: HollisterStier@jubl.com

How do I get my Online Account set up?

- Go to orders.hsallergy.com and click Set-up Account.
- Select Existing Customer.
- Complete the New Customer Account information, click Submit.
- Within 2 business days you will receive an email with your user ID & a temporary password from our Customer Service Department.

How do I change my password & personal contact information?

- If you cannot login to your account, go to orders.hsallergy.com, and select "Forgot My Password". Then enter your username to retrieve your Reset Password Question.
- If you know your password, login to orders.hsallergy.com. Then click on your name and select "My Account." Make any necessary changes to your profile and click submit.



Our clinic is moving locations. How can I change our address?

Visit the Resources page to download the Address Change form. The Credit Card Authorization form and Prescribing License Update form are also available for download.

Where can I find instruction & dosage information for a specific product?

These documents are available in two places:

- Click on the Resources tab and download the form.
- From a Product page, select the Documents tab below the product information. Then download the form.