

## This guide reviews new features and an overview of "My Account":

1. Go to [preferredmedical.com](https://preferredmedical.com) and sign into your web account using your credentials.
2. After signing in, click your username from the top right of the page to access your account. Your account information (addresses, change customer, invoice history, my lists, order history, saved orders, saved payments, and user administration) will all be available in the dropdown.
3. Navigate to your account information by selected any one of the drop-down options, or you can click the "My Account" dropdown and use links in the left sidebar to access the "My Account" options below:

#### a. Secure Online Bill Payment

- i. Use our secure online bill pay to remit payment – you will need your invoice # and customer # (referenced on invoice) to pay via credit card online.

#### b. Account Information:

- i. Change your password.

#### c. Addresses:

- i. View current shipping and billing addresses associated with your account.
- ii. Select a default shipping address for your account that may be different from the billing address.
- iii. You can use your default shipping and billing address or choose one of the other addresses available for your account.
- iv. Please be aware that addresses created online will be "web only" and only saved to the Preferred Medical eCommerce site. ***If a new bill to or ship to address is needed at the account level (such as a new corporate headquarters address), please reach out to Customer Service at 800-722-7865 or [email us](#) to request changes.***

#### d. Change Customer:

- i. This will allow you to select which of the Bill To addresses to use for your orders, if you have multiple in your account.

#### e. Invoice History:

- i. View all invoices for any purchases made after June 20, 2022 by clicking "Invoice History" from your account:
  - You can search for an invoice by Date, Ship To, Invoice #, Order # or PO #.
  - Filter the search results by clicking the filter icon at the top-right of the table.
  - Change the sort order by clicking on the appropriate column header in the listing.
  - Once you locate the invoice, you are now able to print or email a copy of the invoice.
  - Invoices will include tax and shipping. A credit memo will be available for returned or canceled purchases.

#### **f. My Lists:**

- i. View all lists you have created. Search for your list by name or sort by the date the list was updated.
- ii. The "Create List" button will allow you to begin a new list. Enter a list name and description that will make it easily identifiable in the future.
- iii. Creating a list can also be done when viewing individual products. Once you select the "Add to List" under the "Add to Cart" button, you'll have the option to create a New List or add to an existing list.
- iv. You may also create a list from the cart by selecting "Save Order" and click "Add All to List" in the upper right the following screen.
- v. From the "My Lists" page, selecting "Add List to Cart" will send everything in your list to the cart. Select the Cart and proceed to checkout.
- vi. Within each list you can select:
  1. Print – Print your current list.
  2. Schedule Reminder – Schedule a weekly or monthly reminder.
  3. Edit – Change the list name and description.
  4. Share – you can now email this list via email to other users.
  5. Add List to Cart – Add the selected list to Cart.

#### **g. Order History:**

- i. From this page, you can now quickly manage and view previous orders.
- ii. You can search for an order by Order #, Date, Order Total, Status, Ship To or PO #
- iii. Filter the search results by clicking the filter icon at the top-right of the table. Change the sort order by clicking on the appropriate column header in the listing.
- iv. Order Status Definitions:
  1. In Progress – Order is in progress but has not shipped.
  2. Completed – Order has shipped and your invoice is available.
  3. Canceled – Order was successfully canceled.

#### **h. Saved Orders:**

- i. Once you have added items to your cart, you can "Checkout" or "Save Order". By selecting "Save Order", this cart will be stored in the "Saved Orders" tab under "My Account".
- ii. You can filter your saved orders by Order Subtotal, Date or Ship To Address by clicking the filter icon at the top of the list. Change the sort order by clicking on the appropriate column header in the listing.

### i. Saved Payments:

- i. Users will see default credit card and billing address along with the option to edit or delete.
- ii. You will be able to add additional credit card(s) for payments or delete past credit card information.
- iii. You will be able to edit the credit card billing address, name on the card and expiration date. You will not be able to modify a saved credit card number.

***Note: If you would like to modify a saved credit card number, please reach out to Customer Service at 800-722-7865 or [email us](#).***