GUIDE

Genomics Purchase Card

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1. Ordering a new Genomics Purchase Card

Azenta Digital Customer Portal

Log into your Azenta account.

Genomics Services Tab

Under the "Genomics Services" tab, select "Purchase Cards" within the list of options.

1. Ordering a new Genomics Purchase Card

Purchase Card Icon

Select the "Purchase Card" icon. You will then be directed to the "Purchase Card" page.

Purchase Card

Purchase Card Page

If you are already a part of a payment group, you will see a section titled "Order Details". Within this section, you will be able to select your "Payment Group" from the drop-down list or if you leave the dropdown on "create a new group", we will auto-create a new payment group for you with you as the only member.

Order Details	
❓ **Payment Group**	Create a new Group ⌄

Under "Additional Information" there will be optional fields to fill out.

"Order Name" is where you will type a preferred order name for this specific Genomics Purchase Card. It is recommended that you fill out this field to more easily recognize this purchase card order, especially if you plan on purchasing more than one card and need to navigate between multiple orders.

Additional Infomation	
❓ Order Name	
❓ Order Comments	
❓ Special ID	

1. Ordering a new Genomics Purchase Card

Purchase Card Page - *continued*

Below the "Order Details" and "Additional Information" sections, you will see the option to select the amount of money you would like to allocate for your purchase card.

You may either choose from the options listed or you may type your preferred amount within the text box.

After you decide on the amount, click "Save and Review" located in the bottom right corner of your browser window.

Purchase Card Review Page

The "Purchase Card Review" page will give you an overview of the Genomics Purchase Card you have created.

After reviewing, you have the option to make edits by clicking on "Back to Edit" and once you are satisfied, you will click "Add to Cart". These buttons are located at the bottom right corner of your browser window.

1. Ordering a new Genomics Purchase Card

Check Out Page

You will then be taken to your shopping cart within the "Check Out" page where you will see the Genomics Purchase Card displayed as a line item.

If you wish to make any further edits, select "Edit Order". You also have the option to "Review Order" before proceeding.

On the "Check Out" page, you will enter your payment information.

- **Please note** you will not be permitted to use a purchase card payment method to pay for your Genomics Purchase Card.

- **Please note** although your shipping address may be shown during checkout, your Genomics Purchase Card is not a physical card. It is a virtual card, and you will not be receiving an actual card in the mail.

Once you enter your payment information and are ready to complete your order, you will need to review our "Terms & Conditions". Check the box indicating that you agree with our T&Cs and then click "Check Out".

1. Ordering a new Genomics Purchase Card

Check Out Page – *continued*

You will receive a pop-up message confirming your order, followed by a PDF order confirmation that will appear. Within the PDF document, you will be able to find the card account number and PIN number that have been assigned for your purchase card.
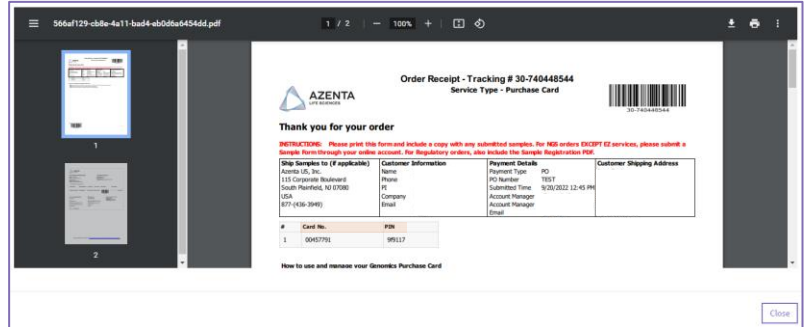
Confirmation Emails

After placing your order for your new Genomics Purchase Card, you will receive a total of 2 confirmation emails. The first confirmation email contains your order tracking number with a brief overview of your order details. The second confirmation email contains the card balance that was ordered, along with your card account number and your card PIN number.

2. Ordering additional Genomics Purchase Cards

Genomics Services Tab

Navigate back to the home page of your Azenta account.

Under the "Genomics Services" tab, select "Purchase Cards" within the list of options.

You will now see additional icons available under "Purchase Cards" (*more on these later in this guide*).
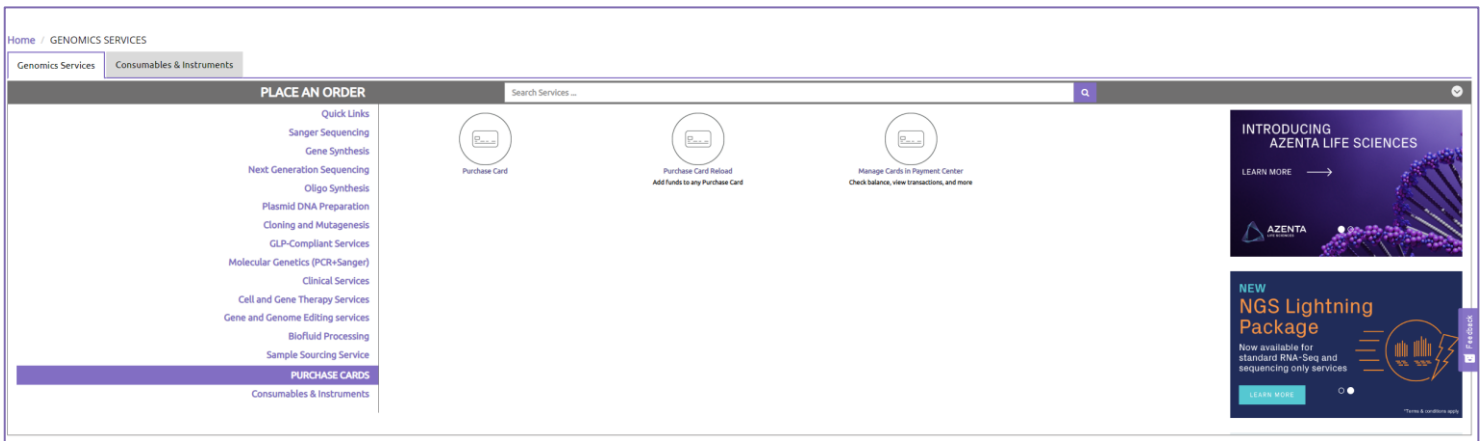
Purchase Card Icon

Select the "Purchase Card" icon and proceed with following the same steps listed on pages 03-06 of this guide to order additional Genomics Purchase Cards.

Purchase Card

3. Managing your Genomics Purchase Card(s)

There are two ways you can navigate to the "Payment Center" page to manage your Genomics Purchase Card(s).

Option #1

Go to the "Genomics Services" tab on the home page of your Azenta account and select "Purchase Cards" within the list of options.

You will then select the "Manage Cards in Payment Center" icon and it will direct you to the "Payment Center" page.

Manage Cards in Payment Center
Check balance, view transactions, and more

Option #2

From the home page of your Azenta account, scroll further down the page until you arrive to the "My Orders" section, which gives you a summary of your orders.

Select the "Payment Center" tab and you will be directed to the "Payment Center" page.

3. Managing your Genomics Purchase Card(s)

Payment Center Page

Under the "Payment methods" tab within the "Payment Center" page, you will be able to see all the Genomics Purchase Cards you have ordered. From the "My Groups" drop-down list, you can switch between your different groups. This will affect which purchase cards are displayed within the table.
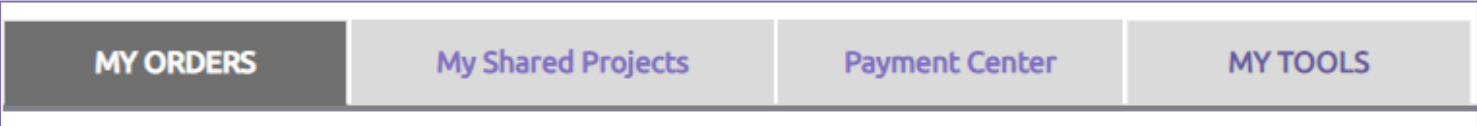
You can view the number of people assigned to your card, the authorized prepaid amount set up on your card, low balance alert, invoiced amount, estimated unbilled amount, and estimated available funds.

If you select the checkbox located to the far left of your purchase card, additional functions will become available. For instance, you can edit the name of your card and your PIN number. To do this, you will select the purple "Edit" button to the far right.

The "Edit" window will appear. Update the "Payment name" and/or PIN # to your liking. Click "Save" once all edits have been made to the card.

- **Please note** you may want to change the "Payment name" if you have multiple purchase cards. This will help you to differentiate more easily between the multiple cards during the checkout process for Genomics Services orders.

Once you select the checkbox next to your purchase card, you also have the option to view your invoice history, unbilled orders, edit your billing address, reload your card (*more on that later in this guide*), review your add fund history, view summary, or inactivate your card.

4. Adding additional funds onto your purchase card(s)

Once the original funds have depleted from your card or your card balance becomes insufficient to where the amount is too low to use on an order, you likely will want to add more funds to your card so it can continue to be utilized by you and/or your colleagues. Adding more funds onto your purchase card can be accomplished in two ways.

Option #1

Go to the "Genomics Services" tab on the home page of the Azenta digital customer portal and select "Purchase Cards" within the list of options.

You will then select the "Purchase Card Reload" icon and it will direct you to the "Purchase Card Reload" page.

Purchase Card Reload
Add funds to any Purchase Card

Purchase Card Reload Page

On the "Purchase Card Reload" page, you will see the "Order Details" and "Additional Information" sections.

Under "Order Details", you will select a purchase card you own from the "My purchase card" drop-down list and enter the amount of funds you would like to add onto purchase card. Click on "Save and Review" located at the bottom right corner of the browser window once complete.

- **Please note** when you add more funds to your purchase card, this can be any amount you wish to add. It does not have to be the same amount that was originally placed on your card. For instance, if the original amount placed on your card was $1000, you may reload your card to only have $500 this time.

4. Adding additional funds onto your purchase card(s)

Option #1 / Purchase Card Reload Page – *continued*

On the "Purchase Card Reload" page, you also have the choice to "Reload for others" where you can add additional funds onto a colleague's purchase card if you have access to their card and PIN #.

To do this, you will check the box next to "Reload for others" and then you will enter your colleague's card number, PIN number, and the amount of funds you wish to add onto their card.

Once this information is filled in, click on "Save and Review" located at the very bottom of the page.

- **Please note** when you add more funds to a purchase card, this can be any amount you wish to add. It does not have to be the same amount that was originally placed on your card.

Home / Purchase Card Reload

Order Details

Reload for others ☑

Card No.

PIN   Validate

Amount

SAVE AND REVIEW

You then will be directed to the "Purchase Card Review" page. Follow the same steps listed on pages 04-06 of this guide to finish checking out the reload order.

You will only receive one confirmation email for a reload order, which contains your order tracking number with a brief overview of your order details.

4. Adding additional funds onto your purchase card(s)

Option #2

Follow the steps listed on pages 08 & 09 of this guide to navigate to the "Payment Center" page.

Under the "Payment Methods" tab within Payment Center, you will be able to see all the Genomics Purchase Cards you have ordered.

Select the checkbox located to the far left of the purchase card that you wish to reload and then click on the purple "Reload Card" button located above the table.
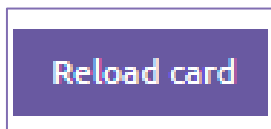
Reload card

The "Reload Card" window will appear. Enter the amount of funds you wish to add to your card. Then click on "Save".

- **Please note** when you add more funds to your purchase card, this can be any amount you wish to add. It does not have to be the same amount that was originally placed on your card.

Reload card	
Payment name:	00457791
Card No.:	00457791
Amount*:	
	Tax excluded

Close   Save

You then will be directed to the "Purchase Card Review" page. Follow the same steps listed on pages 04-06 of this guide to finish checking out the reload order.

You will only receive one confirmation email for a reload order, which contains your order tracking number with a brief overview of your order details.

5. Using your purchase card(s) as a payment method

Genomics Services Tab

Under the "Genomics Services" tab on the home page of your Azenta account, proceed to start ordering a Genomics Service as you typically would within the Azenta digital customer portal.

Follow all the usual steps to place your order.

Check Out Page

Once you get to the "Check Out" page, under the "Payment Type" section, you will now have the option to choose "Purchase Card" as your payment method or you can find your purchase card listed within the "Shared Payments" option.

If you select, "Purchase Card". You will need to enter your card number and your PIN directly.

5. Using your purchase card(s) as a payment method

Check out Page - *continued*

The other option is to select "Shared Payments" and you will be able to select a purchase card within your group that has a sufficient balance.

- • **Please note** if the total amount of your order exceeds the amount of funds available on your purchase card, a "Balance Insufficient" warning will appear. You will not be permitted to use a purchase card with insufficient funds as a payment method for your order. However, if you reload your purchase card with an amount that meets or exceeds your order, you will once again be able to use that card to checkout.

After you select your payment type, you will need to review our "Terms & Conditions" and accept them by selecting the box. Proceed with placing your order by clicking "Check Out".

An order confirmation message will appear, along with a PDF confirmation, and an email confirmation.

6. Sharing your purchase card(s) with other colleagues

The scope of people that you can share your purchase card with is tied to your group's member base. You can view group members within Payment Center under the "Group members" tab. You will only be able to share your purchase card with group members that have an active status.

If the person you wish to share your purchase card with is not appearing within the table under the "Group members" tab, you will need to get that person added by selecting the "Invite colleague" button.

A window will appear to fill out your colleague's contact information. When you click "Invite", an email will be sent to your colleague. They will need to open that email to confirm and accept the invite. This then will trigger a notification to Azenta to confirm the member you have invited to your group.

There are two ways in which you can share your Genomics Purchase Card with others so that they may also use the card as a payment method for Genomics Services orders.

Option #1

You can share your card number and PIN with your colleagues. When checking out Genomics Services, your colleague will be able to directly enter your card number and PIN if they select "Purchase Card" as their payment type.

6. Sharing your purchase card(s) with other colleagues

Option #1 - *continued*

If your colleague directly enters your purchase card information for an order, your colleague will automatically appear under the "Assign member" window located within Payment Center.

Assign member			✕

Payment name: TEST #1 (Description: if a member's "Limit" is checked, this member is limited to use only Payment Center payment method.)

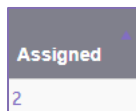| #	Member name	Assigned	Limit
1	Active Group Member Name	☑	☐
2	Your Name	☑	☐

Close | Save

Option #2

Within Payment Center (*follow steps on pages 08 & 09 of this guide to navigate to Payment Center*), look for the purchase card you wish to share with your colleague(s) and under the "Assigned" column within the table, click on the number.

Assigned
2

The "Assign member" window (*view first image shown above*) will pop-up and from here you can view active members within your group that you are permitted to share your card.

Check the box under "Assigned" next to the name of the group member you wish to share the card. This will allow your colleague to see your purchase card listed in the "Shared Payments" section at checkout.

If you check the box under "Limit", this means that the member is limited to only using the "Shared Payments" payment type during check out where they will be able to select their assigned purchase card from the drop-down list. The member will not be able to select "Purchase Card" under "Payment Type" when checking out an order, thus not having permission to directly input the card credentials during check out.

Click "Save"

7. Where to find card number and PIN

When you buy a Genomics Purchase Card for the first time, you will receive a confirmation email that includes your card number and PIN. Be sure to save that email in a safe place for you to be able to reference it when needed.
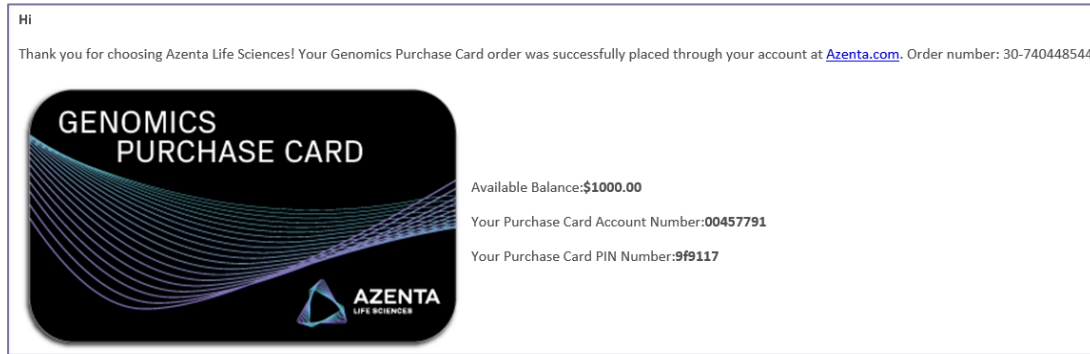
You can also find your card number and PIN information within Payment Center (*follow steps on pages 08 & 09 of this guide to navigate to Payment Center*).

Under the "Payment methods" tab within Payment Center, you will be able to see all the Genomics Purchase Cards you have ordered. From the "My Groups" drop-down list, you can switch between your different groups. This will affect which purchase cards are displayed within the table.

Within the table, your card number is listed under the "Payment name" and "Account #" columns. The default payment name of your purchase card is your card number, but you have the option to change your payment name to your liking.

By selecting the checkbox located to the far left of your purchase card, additional functions will become available. If you select the "View Summary" button, you can find your card number and PIN within the window that appears. You can also change your payment name and PIN by clicking on the "Edit" button.
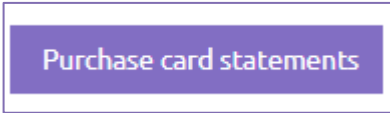
8. Review and download purchase card statements

You can view your purchase card statements at any time within Payment Center.

Under the "Payment methods" tab within Payment Center, select the checkbox to the far left of the purchase card you want to review.
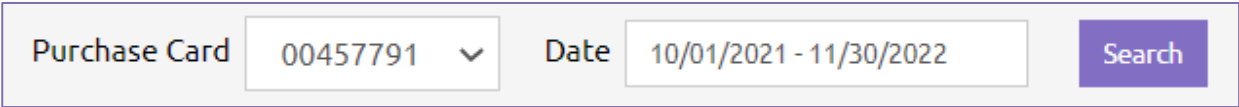
You will then click on the "Purchase card statements" button above the table.

After clicking on the "Purchase card statements" button, you can also switch between the purchase cards you wish to review within the drop-down list.

From here, you can select a specific date range.

Click on the "Search" button when you are ready to review the results based on the criteria you have chosen.
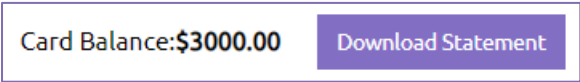

You will be able to review the results within the table shown, but you also have the option to download a PDF copy of your statements based on the search criteria you selected.

To do this, click on the "Download Statement" button displayed above the table and to the righthand side of the page.
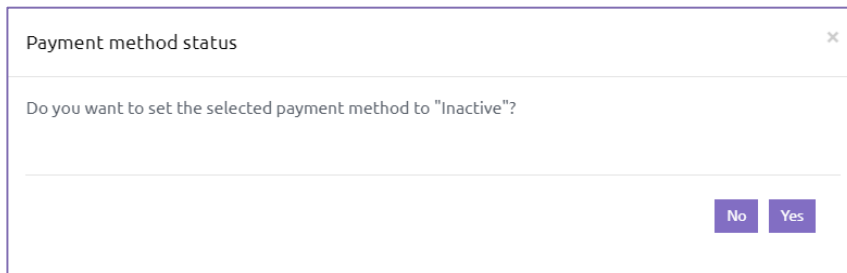
9. Inactivating & reactivating your purchase card(s)

Inactivating Your Card

To inactivate a purchase card, you need to be under the "Payment method" tab within Payment Center. Select the checkbox to the far left of the purchase card you wish to inactivate. The "Inactivate" button will then be available above the table. Click on it.
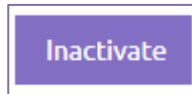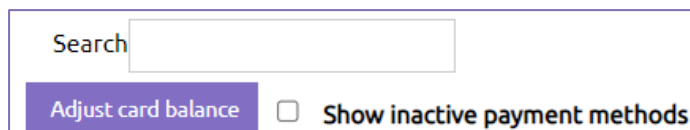

A window will appear. Select "Yes" to proceed with the inactivation. After selecting "Yes" your purchase card will no longer appear in the table.


Reactivating Your Card

If you would like to reactivate a purchase card that you have inactivated, you will need to select the checkbox next to "Show inactive payment methods". This is located under the search bar and next to the "Adjust card balance" button.

The inactive purchase card will reappear within the table.

To reactivate, you will need to select the checkbox to the left of the card and click on the "Active" button above the table.
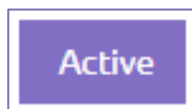
When the window appears, select "Yes" if you wish to proceed with reactivating the card.

The purchase card will again appear within the table, and you will be able to continue to use this card as a payment method for Genomics services.
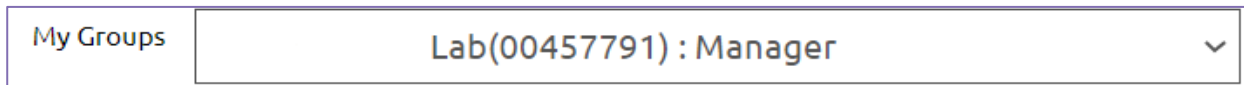
10. Prevent someone from reusing your purchase card(s)

If you want to prevent someone from reusing your purchase card, you should inactivate that person from your group account so they can no longer access your purchase card as a shared payment. If that person has access to your purchase card PIN, it is recommended you then change your PIN to prevent them from being able to manually enter your card credentials when checking out a Genomics Services order.

Inactivate Member from Group Account

You can inactivate a member from your group account through Payment Center.

Under the "My Groups" dropdown, make sure the proper group account is selected that includes the person you wish to inactivate.

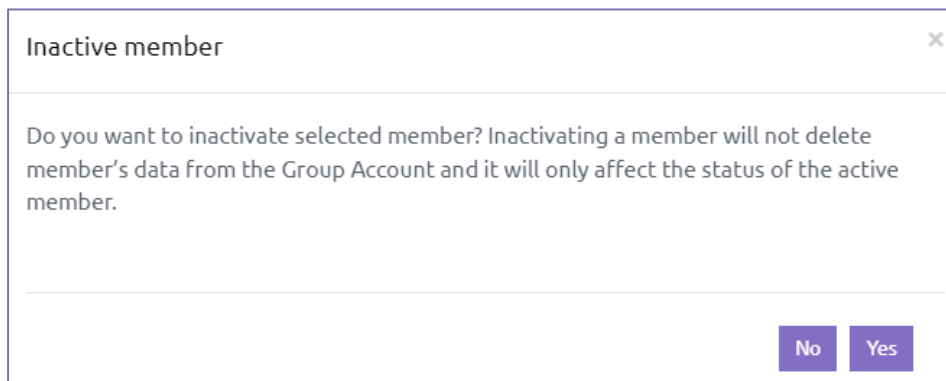Select the "Group members" tab. A table will appear to show all the members assigned to that group account.

Select the checkbox to the far left of the group member you wish to inactivate from the group account and click on the "Inactivate" button located above the table.

The "Inactive member" window will appear. If you are sure you want to inactivate this group member, click "Yes" and the person will be removed. It is recommended that you now change your PIN (*more on next page*).

10. Prevent someone from reusing your purchase card(s)

Change Your Purchase Card PIN

Changing your PIN will help prevent someone from reusing your card.

Under the "Payment methods" tab within Payment Center, you will be able to see all the Genomics Purchase Cards you have ordered. From the "My Groups" drop-down list, you can switch between your different groups. This will affect which purchase cards are displayed within the table.

By selecting the checkbox located to the far left of your purchase card, additional functions will become available.

If you select the "Edit" button, you can change your PIN within the window that appears. Click "Save" when finished.

Be sure to only share this information with colleagues that you want to be able to use your purchase card for Genomics Services.

11. Additional information

The Genomics Purchase Card is permitted for use as a payment method for purchasing only Genomics Services. A Genomics Purchase Card cannot be used as a payment method for Consumables & Instruments.

The Genomics Purchase Card is not a physical card. It is a virtual based card, and you will not be receiving an actual card in the mail.

There is no expiration date on when you must use up the funds on your purchase cards.

If your funds become low or fully depleted on your purchase card, you do not have to purchase a brand-new card. You can use the reload feature to add more funds onto your existing card.

If you need to transfer the ownership of your Genomics Purchase Card to a new card owner, there is not a way for you to do this within the Azenta digital customer portal interface. You will need to raise a request directly with our support team.

If you inactivate your purchase card, you can no longer use that card to purchase services from our site. An inactivated card cannot be reloaded with additional funds. You can still view the statement module for the inactivated card by selecting the "Show inactive payment methods" checkbox as outlined on page 19 of this guide.

For more information, please reach out to your Azenta sales representative or review the most frequently asked questions about the Azenta Payment Center and the Genomics Purchase Card.

12. Appendix

UK Customers: VAT Considerations

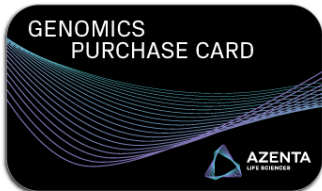When creating your Genomics Purchase Card order, you can select if the funds should be VAT-exempt.

Under "Order Details", select the "Yes" or "No" radio button for VAT exemption.

- **Please note** a VAT exempt Purchase Card is limited to the purchase of Gene Synthesis, Oligo Flex Services, and Oligo Custom Orders only. Purchase of all other services is prohibited with a VAT exempt Purchase Card.