

## CMS Client Smart Orders User Guide AstraZeneca UK

Version 1 (17/10/2016)

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#### **Client Portal Login**



Using the URL provided the Client Portal login screen will be displayed.

Enter the Login Credentials supplied and click 'Submit' to enter the platform.

#### **Client Portal**



The **Client Homepage** allows access to these areas within the platform.

- 1) AZ Non Standard Orders via 'Create a Request',
- 2) XDAM via Upload Files,
- 3) Smart Orders and
- 4) Smart Meetings
- NB: This guide will cover the Smart Order process.

Click on 'Smart Orders' to start the Smart ordering process.



#### **Client Portal**



On the left hand margin, select the appropriate 'Department/Brand' as highlighted, to start the 'Smart Order' request process.

After selecting the correct 'Department/Brand', select the required 'Item' from the stock list.

NB: For 'Non Standard' ordering or 'Smart Meetings', please refer to the relevant 'User Guides'.

\*\*\* Each individual's user account configuration will only show 'Departments/Brands' relevant to them. \*\*\*

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**Configure Product Request** 

After selecting the required item, click the 'Place an Order' button to initiate the details of the order request.

**NB:** If more than one type of the selected item is available, check the item description carefully before continuing.

**NB:** If '**Product Numbers**' of any required items are known, they can be entered in the '**Search**' box instead.



#### **Product Item Quantity**

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	Total quantity is limited to: Maxi In stock. 1000 items	mum 500				
	AtlasCode:	ATL047				
1	AtlasExpiry:	ATLE047				

This screen confirms the product selection. Enter the required '**Quantity**'; check the '**Atlas Code/Expiry**' details, if known.

Scroll down to click 'Submit' and confirm the correct 'Order Quantity'.

**NB:** 'Total Stock' and 'Maximum Order' quantities, as highlighted above, are clearly shown. If the request is for more than the 'Maximum Order' quantity, the order will be sent for authorisation. Any orders for <u>more</u> stock than what is available will prompt an email notification to be sent to the requester once enough stock is available to cover the initial request.

#### **Product Item Quantity**

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After entering the required 'Quantity', scroll down the screen and select 'Submit' to continue to the 'Shopping Cart'.

NB: Selecting the 'Back' button allows previous choices to be edited if required.



#### **Shopping Cart – Summary**

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This request summary is just before '**Checkout**' and there is an opportunity to revise the information by clicking the '**Edit**' link and amending as required. Alternatively, if there is a requirement to add additional items to the order click '**Continue Shopping**' and repeat the previous steps...adding items to the '**Shopping**' **Cart**'.

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Home My account	Cart	Drafts	Help Sign out	
Shopping cart items - to check	out now Name	Units	Price	
	Bydureon Presenter (UK) January 2016 <u>Sdi</u>	Total: 10 items (1 item = 1 items)	-	
		Subtotal	-	
		Continue sho	oping Submit	
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#### **Shopping Cart - Summary**

The request can be saved for later by clicking on the '**Shopping Cart**' icon. This will move the request to a '**Draft**' status in the '**Shopping Cart**'. Alternatively, if it is no longer required, then click on the '**Trash Can**' icon to delete the request.

When ready to proceed, click 'Submit'.



#### **Delivery Address Identification**

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Add	ess details > Payment & :	submission						
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The '**Shipping/Delivery**' addresses can now be identified from the drop down lists. New addresses can easily be set up by clicking on the '**Add**' icon and filling in the appropriate fields.

When correctly selected scroll down.

**Delivery Address Identification** 

**NB:** Deliveries can be split across multiple delivery addresses by clicking the 'Send to Multiple Addresses' button, as highlighted above.

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Select Select Elaine 600 Ca Luton	hipping address ct from my shipping addresses [500 Capability Green [ I address ssell = <u>A Edit.</u>	Send to multiple addresses           B         Add         B         Select From Storefront Address Book		
United	U1 3LU Ingdom			
Order	ems	Service		
	Name Bydureon Presenter (UK) January 2016	No. of units 10 items	d 🗸	

Use the highlighted dropdown to select the appropriate '**Delivery Service**' and click '**Next**' to continue.

**NB:** User preferred '**Delivery Days**' are set within the '**User's Account Profile**'. These <u>can</u> be changed, please see **P.10.** for more information on how to do this. If the order is urgent, these preferred '**Delivery Days**' <u>can</u> also be overridden by selecting either of the next day delivery options within the dropdown.



#### **Checkout Request Summary**

**Request Summary** 

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Home My accoun	Cart	Drafts	Help Sign out	
	<b>ર</b>			
Address details > Payment &	& submission			
Ordered items				
	Name	Units	Price	
And	Bydureon Presenter (UK) January 2016	Total: 10 items (1 item = 1 items)		
	Tax:		£0.00 GBP	
	Total:		-	

The request summary is now displayed; details of the order can be reviewed and edited, if required, by scrolling down the screen and clicking on the '**Back**' button.

After checking all order details, scroll down the screen and select '**Checkout**' to submit the order request.

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Home My account Cart	Drafts	Help	Sign out	
Your order has been received successfully. Order number 356421				
It die ond a bauty oprevery men as se der minime to be Approved. order wil be Auto Approved. Othewise this order needs to be Approved.				
Print order details Continue Shopping				

The order has now been submitted and a confirmation 'Request Number' is displayed.

If there is a requirement to add a new request, then click 'Continue Shopping'.



#### **Request Confirmation**

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From: uS Sent: 17 To: USA Subject: The inv Order n Quantity Current	store Adm October 2 CMS XMP ***DEMG 356421 umber: 33 y: 10 item on-shelf product a	in [malito:admin@ 016 11:05 ie Team CUSA.CM ***:***DEV***: el of the product is inventory level: 9 aventory status:	S.XMPie.Team Inventory Cha Bydureon Pro 90 items	n.com) i@xerox.com> nged Alert - Bydurec esenter (UK) Janua	on Presenter (UK) ry 2016 in the sto	January 2016 (ID:	3970) Order 1	has changed.										
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Upon submission of an order, an automated email confirmation will be sent summarizing the request details.

#### **Request Status**



To '**View**' an order status or '**Reorder**' any previously placed order, click on the '**My Account**' tab, as highlighted above at the top of the screen.

NB: This will allow access to the individual user's 'Order History'.



#### **Request Status**

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Home My account Cart	Drafts	Help Sign out				
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This page allows you to view your order history, edit your personal information, and set your or Order history Review your past or pending orders.	lefault billing and shipping information.					
Personal Information Update your personal details.						
Addresses Manage your addresses.						
Recipient lists Manage recipient lists.						

Click on the 'Order History' link to display a list of 'Historic Jobs'.

#### **Request Status**

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	Home	My account Cart			Drafts Help	Sign out	
	Order id:	Q	Ø View.	M orders Pending approval orders Rejected orders Orders in progress Shipped orders Pending payment		Advanced search	
	Order#	Order date	Total amount	Status			
	356421 760501	17/10/2016 17/10/2016	£0.00 GBP £0.00 GBP	In progress	Show receipt Show receipt		

Recent orders will be displayed together with their '**Order Status**'. There is also an option to select the status type by using the drop down menu, as highlighted above.

To '**Reorder**' any previously placed orders again, click the historic order number to continue.



#### **Request Status – Reordering**

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Home My account Cart	Drafts	Help Sign out	
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Order#: 356421 Show receipt			
✓ Approved by Aneesh Shenoy on 17/10/2016			
Dayment datails-			
Purchase details			
Product	Units	Price	
Product Bydureon Presenter (UK) January 2016 Reorder	Units Total: 10 items (1 item = 1 items)	Price £0.00 GBP	
Product Bydureon Presenter (UK) January 2016 Reorder Delivery details	Units Total: 10 items (1 item = 1 items)	Price £0.00 GBP	
Product       Product       Bydureon Presenter (UK) January 2016       Reorder   Delivery details       Address     Id   Product name	Units Total: 10 items (1 item = 1 items) No. of units Status	Price £0.00 GBP	

To '**Reorder**' any previously placed orders again, click the historic order number to continue, as mentioned earlier and click '**Reorder**', as highlighted above.

**NB:** After clicking '**Reorder**' against the required '**Historic Order**'...a summary is shown, as per **P.4**. Clicking edit at this stage will allow the '**Quantity**', if required, to be changed.



#### Home Page

Click on the 'Home' tab at the top of the screen, at any time, to be returned back to the homepage.

**NB:** Please refer to the '**Non Standard**' or '**Smart Meeting** user guides for information on placing these types of request.



#### Home Page – Changing 'Delivery Days'



To change a user's '**Preferred Delivery Day**', from any screen, click on the '**My Account**' tab, as highlighted above.

#### Home Page – Changing 'Delivery Days'



To change a user's '**Preferred Delivery Day**', after clicking on the '**My Account**' tab, select '**Personal Information**', as highlighted above.



#### Home Page – Changing 'Delivery Days'

Phono Number				
Phone Number:				
Patient Care area or functional department:				
Mobile Number(only AZ No.):	07739 820009			
Fax Number:				
Job Title:				
Department:	Select	~		
Country of Orgin:				
Country of Invoice:				
Delivery Day:	OOOC Mon Tue Wed Th	) ● 〇 u Fri Any	]	
	Back	Save		
			J	

Any personal information can be edited in this screen, to change the '**Preferred Delivery Dates**', scroll down the screen, amend accordingly and click '**Save**' to update and continue.

**NB:** The screen will refresh and return the user back to the top menu bar, as per the screen shot below.

Signing Out					
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Home My account Cart		Drafts Help	Sign out		
Q.					
Personal Information					
Values saved successfully					
Email Address:	Elaine.Bissell@xerox.com				
First Name:	Elaíne				
Last Name:	Bissell				
Cost Centre:					
Select Location:	Select				
Phone Number:					
Patient Care area or functional departmen	t				
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Click on the 'Sign Out' button, as highlighted above, at the top of the screen to log out of the platform or click the 'Home' button to be returned back to the homepage.

NB: Please refer to the 'Non Standard' user guide for guidance on ordering any 'Ad Hoc' items.

NB: Please refer to the 'Smart Meetings' user guides for guidance on setting up a meeting.

Click here to return to the 'Contents Page'.