

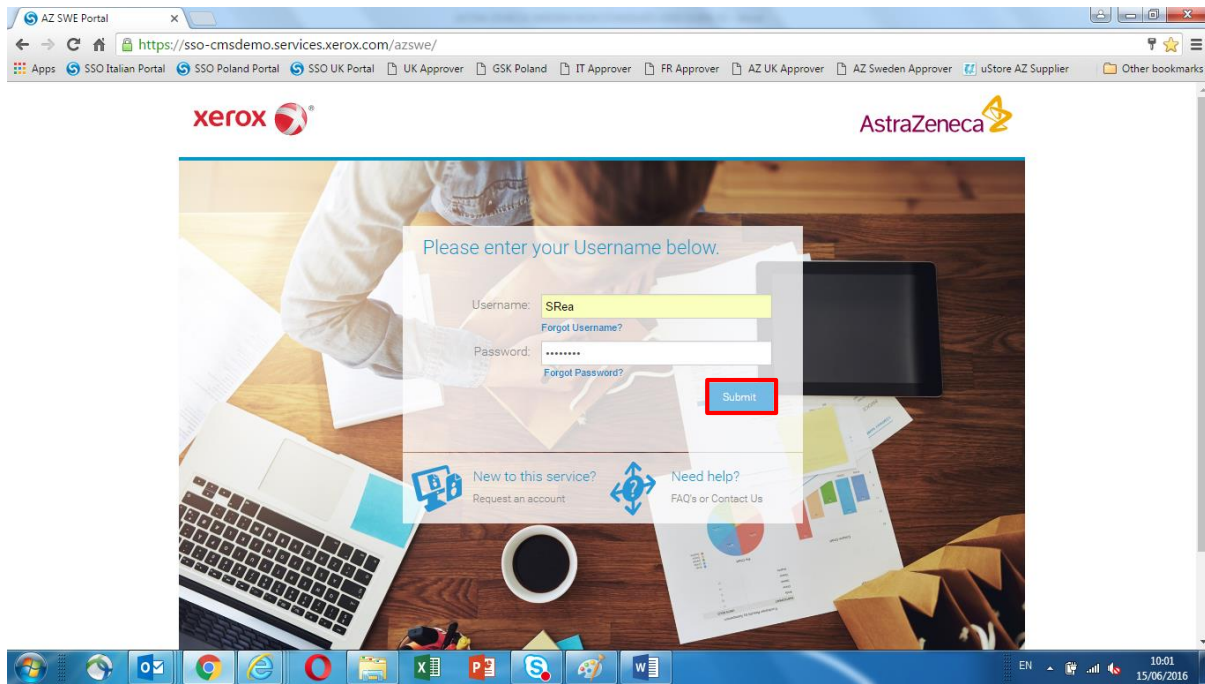
CMS Client Smart Orders User Guide AstraZeneca UK

Version 1 (17/10/2016)

Contents

	Page No
Client Portal Login	1
Client Portal	1-2
Configure Product Request	2
Shopping Cart Summary	4
Delivery Address Identification	5
Checkout Request Summary	6
Request Summary	6
Request Confirmation.....	7
Request Status	7-8
Request Status - Reordering	9
Homepage.....	9
Homepage – Changing Preferred Delivery Days.....	10-11
Signing Out.....	11

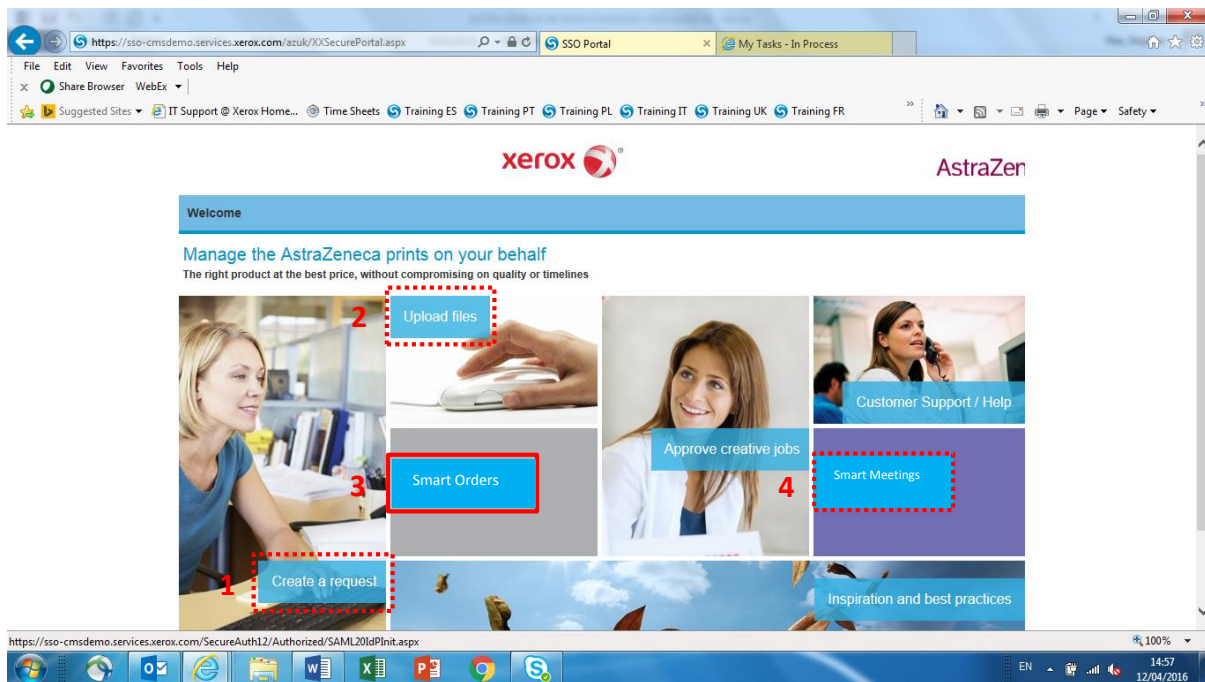
Client Portal Login



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



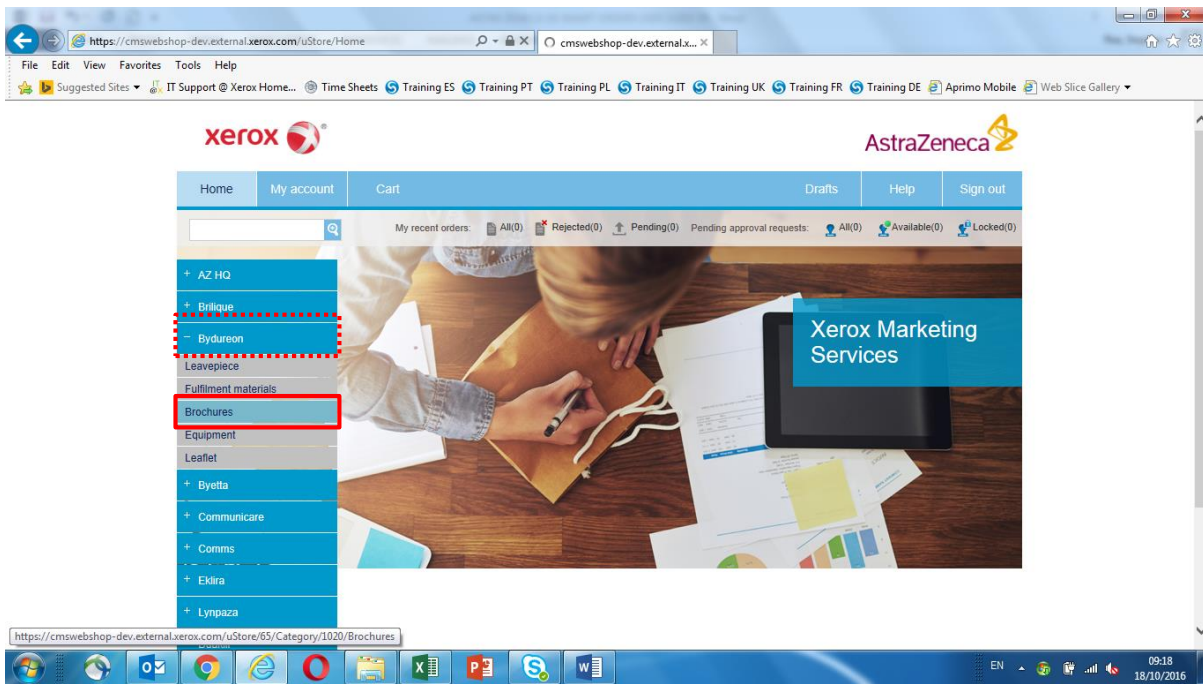
The **Client Homepage** allows access to these areas within the platform.

- 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. ***

Configure Product Request

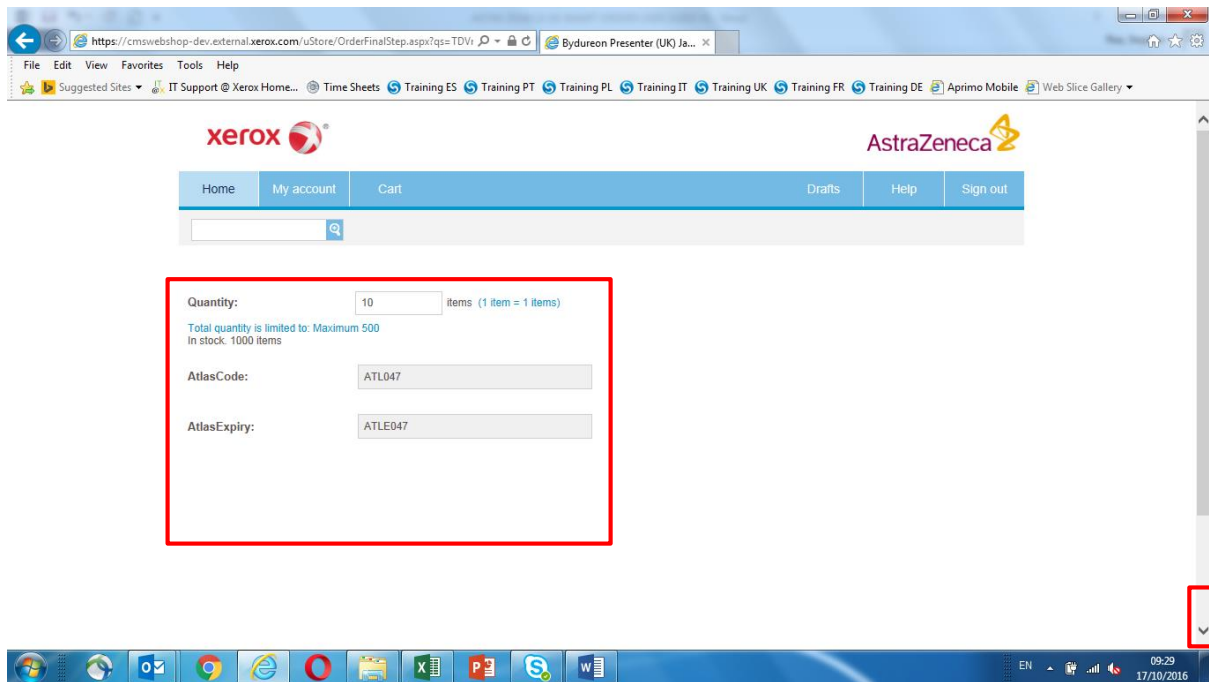


After selecting the required item, click the **'Place an Order'** button to initiate the details of the order request.

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

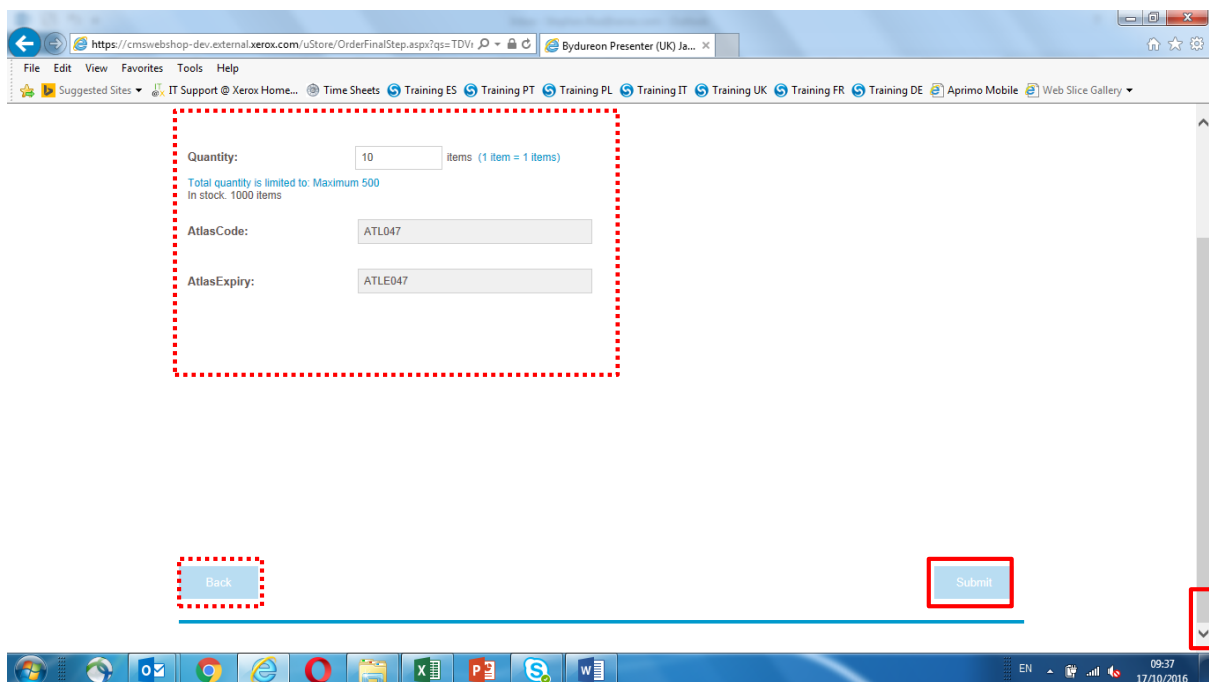


This screen confirms the product selection. Enter the required **'Quantity'**; check the **'Atlas Code/Expiry'** details, if known.

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 **more** 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.

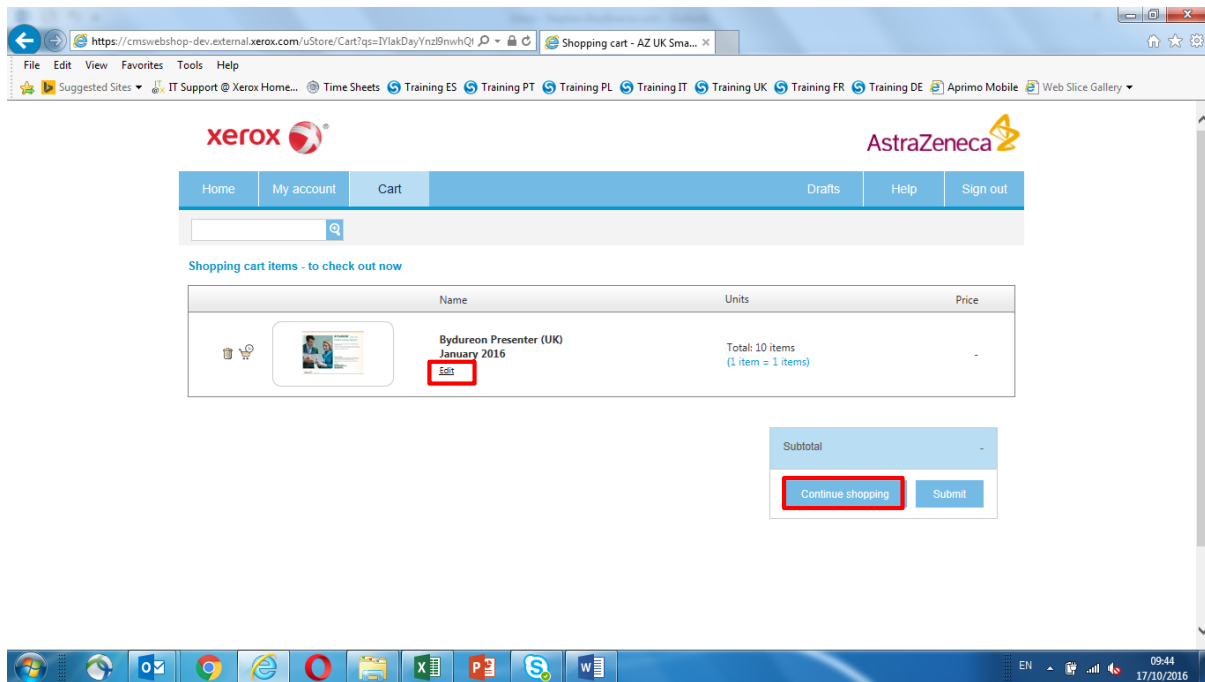
Product Item Quantity



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

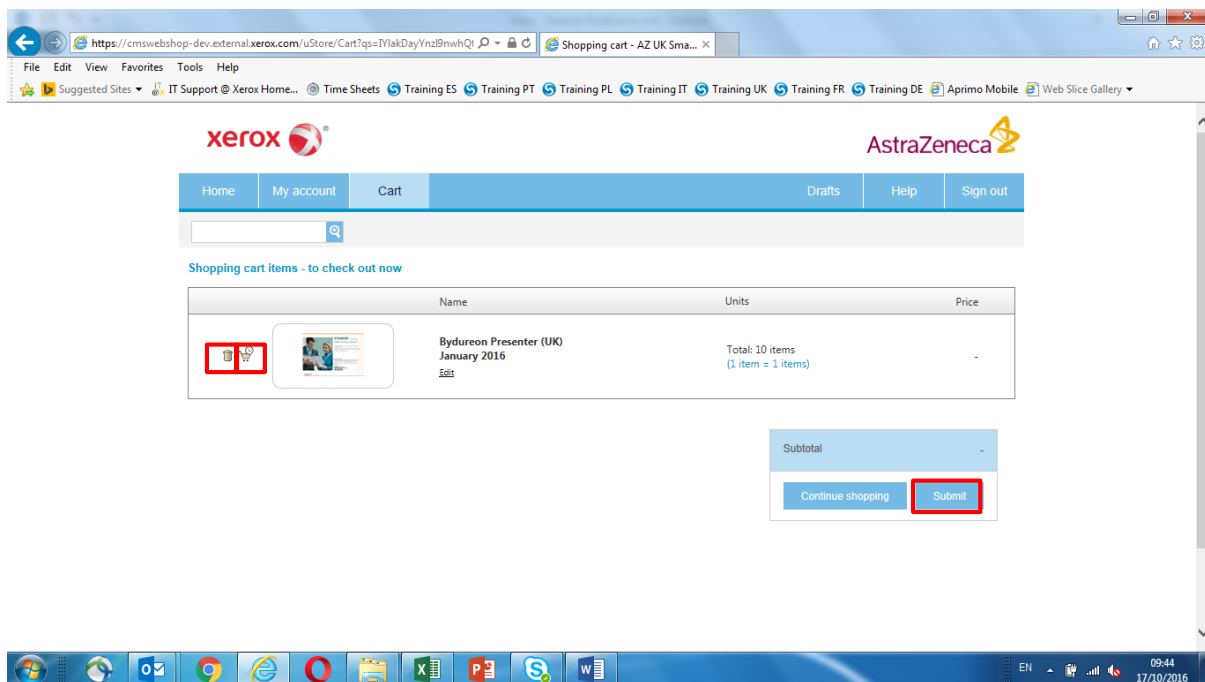
NB: Selecting the **'Back'** button allows previous choices to be edited if required.

Shopping Cart – Summary



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'**.

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

The screenshot shows the checkout page with the shipping section. A dropdown menu is open for selecting a shipping address, with '600 Capability Green' selected. The 'Add...' button is highlighted with a red box. Below the address selection, the selected address details are shown: Elaine Bissell, 600 Capability Green, Luton LU1 3LU, United Kingdom. The order items table shows 'Bydureon Presenter (UK) January 2016' with 10 units and a 'Standard' service. The 'Send to multiple addresses' button is also visible.

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.

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

Delivery Address Identification

This screenshot shows the same checkout page, but the 'Standard' service dropdown in the order items table is highlighted with a red box. The 'Next >' button at the bottom right of the shipping section is also highlighted with a red box. The address selection remains the same as in the previous screenshot.

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 can be changed, please see [P.10](#) for more information on how to do this. If the order is urgent, these preferred **'Delivery Days'** can also be overridden by selecting either of the next day delivery options within the dropdown.

Checkout Request Summary

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.

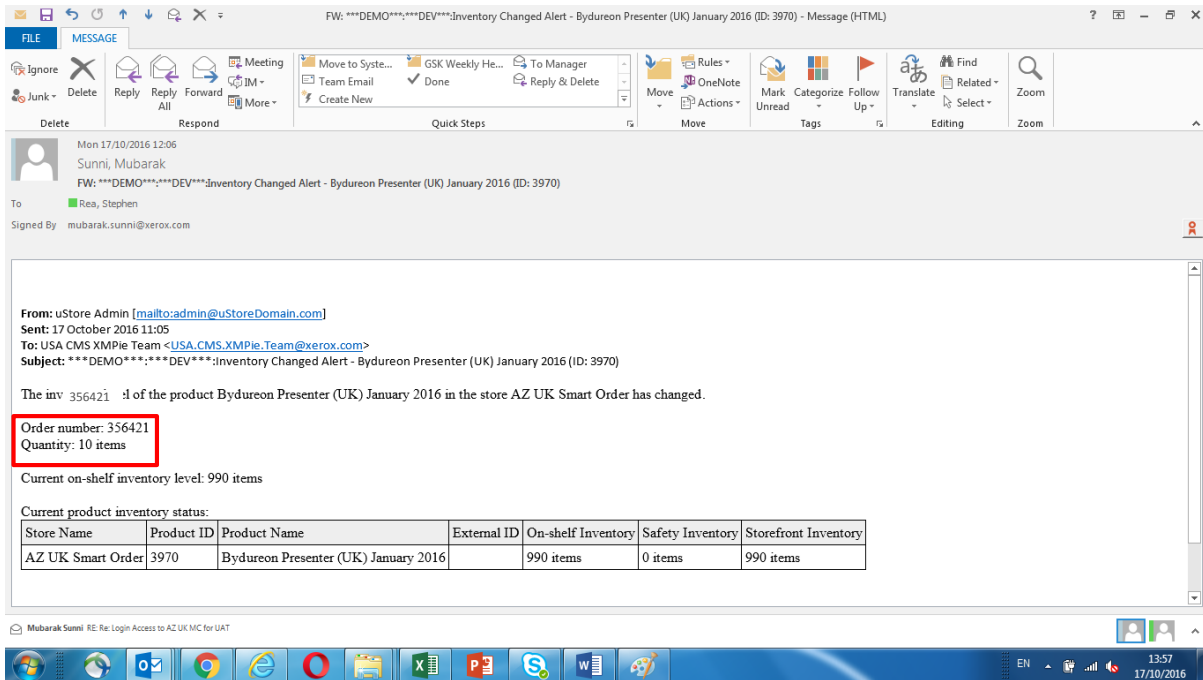
After checking all order details, scroll down the screen and select **'Checkout'** to submit the order request.

Request Summary

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

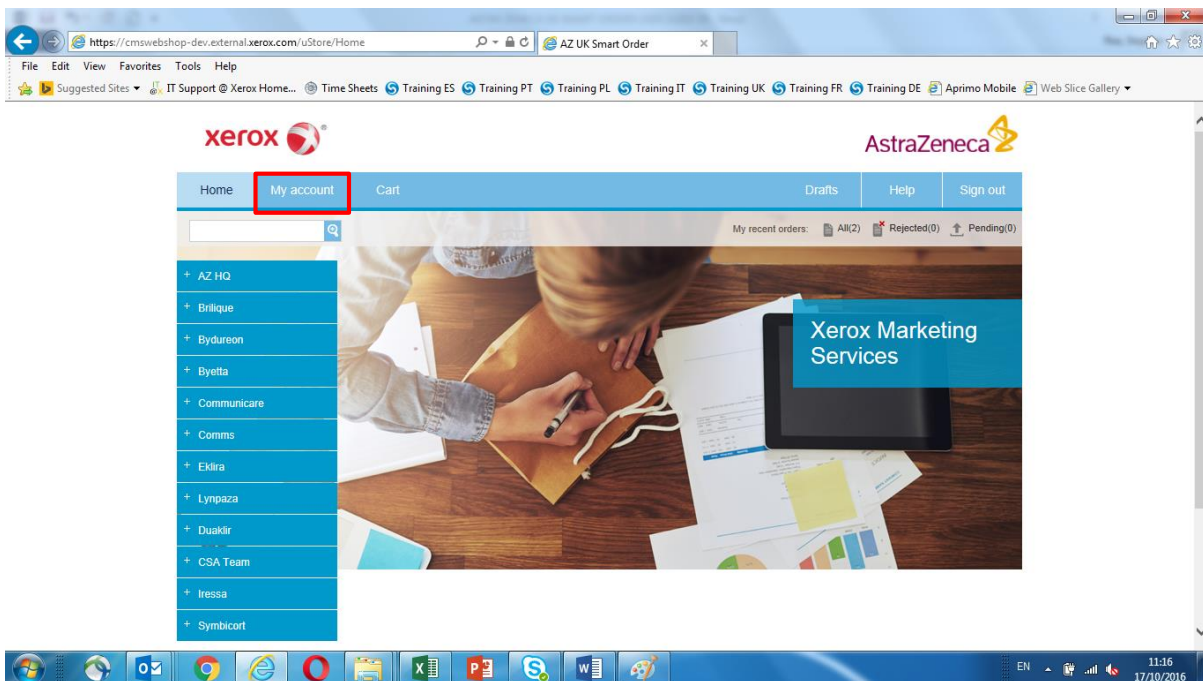
If there is a requirement to add a new request, then click **'Continue Shopping'**.

Request Confirmation



Upon submission of an order, an automated email confirmation will be sent summarizing the request details.

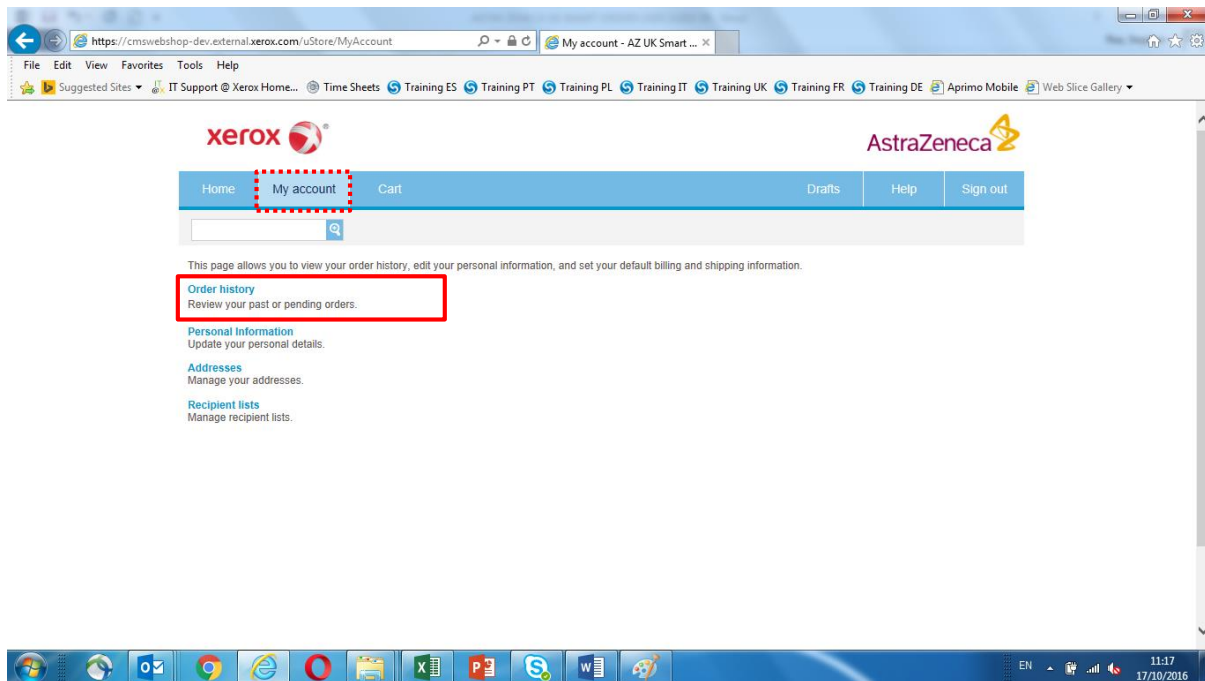
Request Status



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



https://cmswebshop-dev.external.xerox.com/USStore/MyAccount

My account - AZ UK Smart...

Suggested Sites IT Support @ Xerox Home... Time Sheets Training ES Training PT Training PL Training IT Training UK Training FR Training DE Aprimo Mobile Web Slice Gallery

xerox AstraZeneca

Home My account Cart Drafts Help Sign out

This page allows you to view your order history, edit your personal information, and set your default billing and shipping information.

Order history
Review your past or pending orders.

Personal Information
Update your personal details.

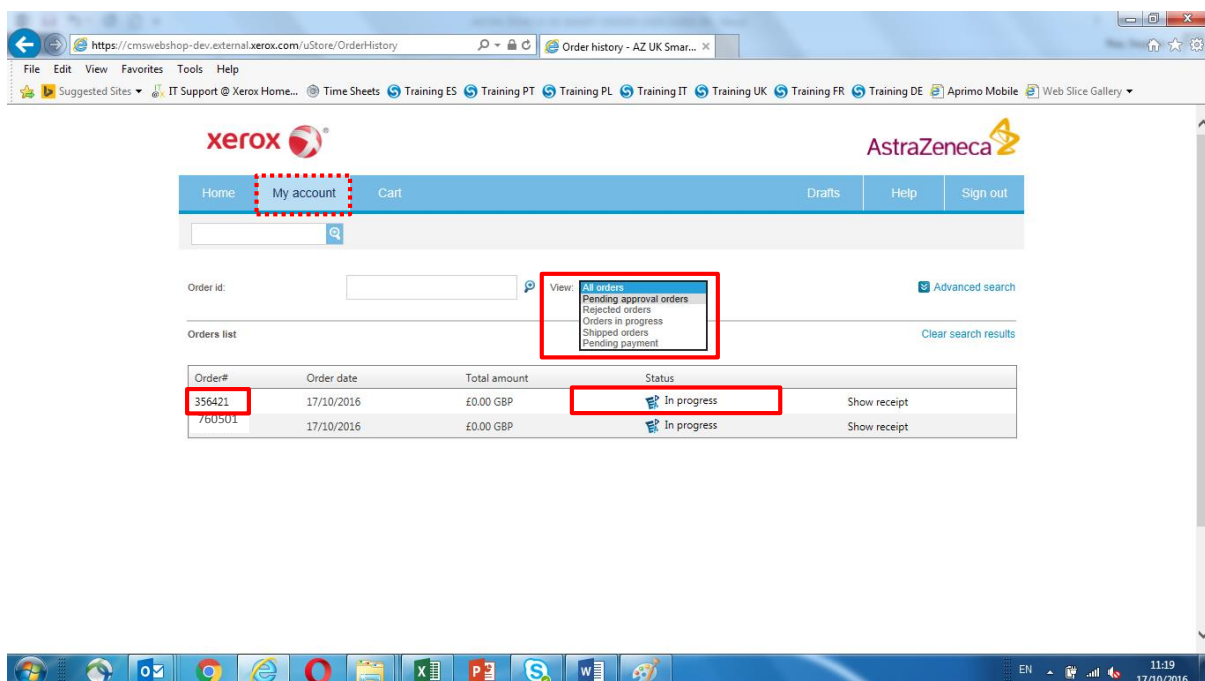
Addresses
Manage your addresses.

Recipient lists
Manage recipient lists.

EN 11:17 17/10/2016

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

Request Status



https://cmswebshop-dev.external.xerox.com/USStore/OrderHistory

Order history - AZ UK Smart...

Suggested Sites IT Support @ Xerox Home... Time Sheets Training ES Training PT Training PL Training IT Training UK Training FR Training DE Aprimo Mobile Web Slice Gallery

xerox AstraZeneca

Home My account Cart Drafts Help Sign out

Order id: View: **All orders** Advanced search

Orders list Clear search results

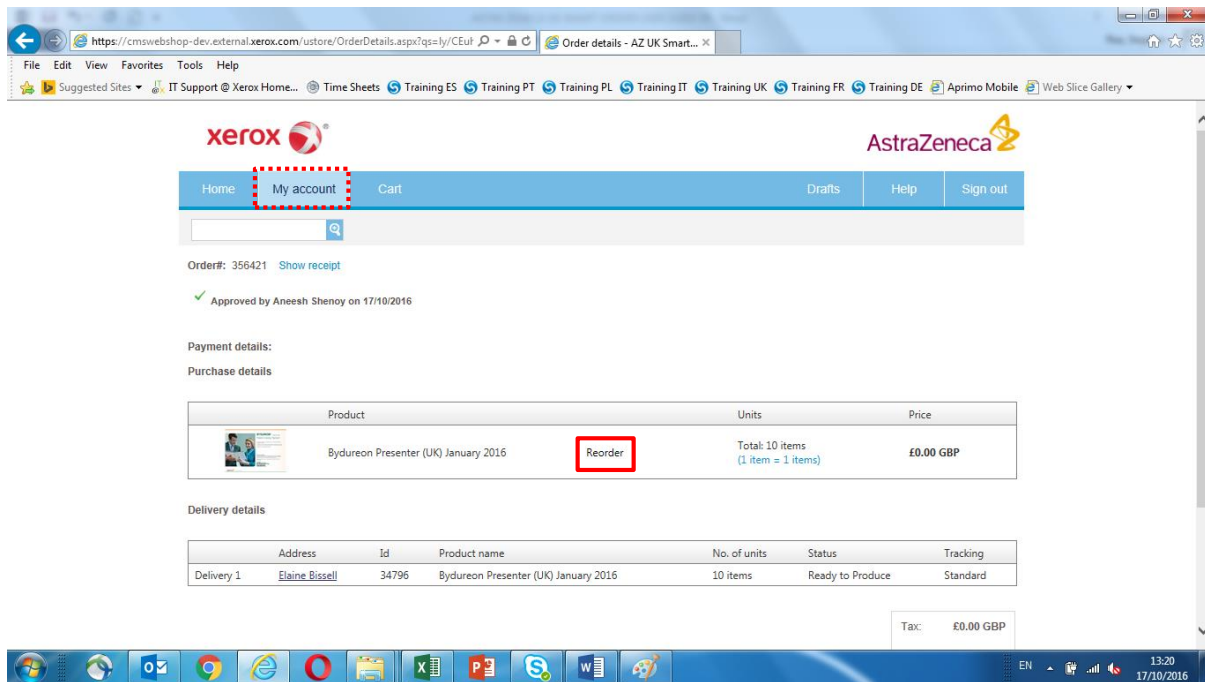
Order#	Order date	Total amount	Status	Show receipt
356421	17/10/2016	£0.00 GBP	In progress	Show receipt
760501	17/10/2016	£0.00 GBP	In progress	Show receipt

EN 11:19 17/10/2016

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




Order#: 356421 [Show receipt](#)

Approved by Aneesh Shenoy on 17/10/2016

Payment details:

Purchase details:

Product	Units	Price
 Bydureon Presenter (UK) January 2016 Reorder	Total: 10 items (1 item = 1 items)	£0.00 GBP

Delivery details:

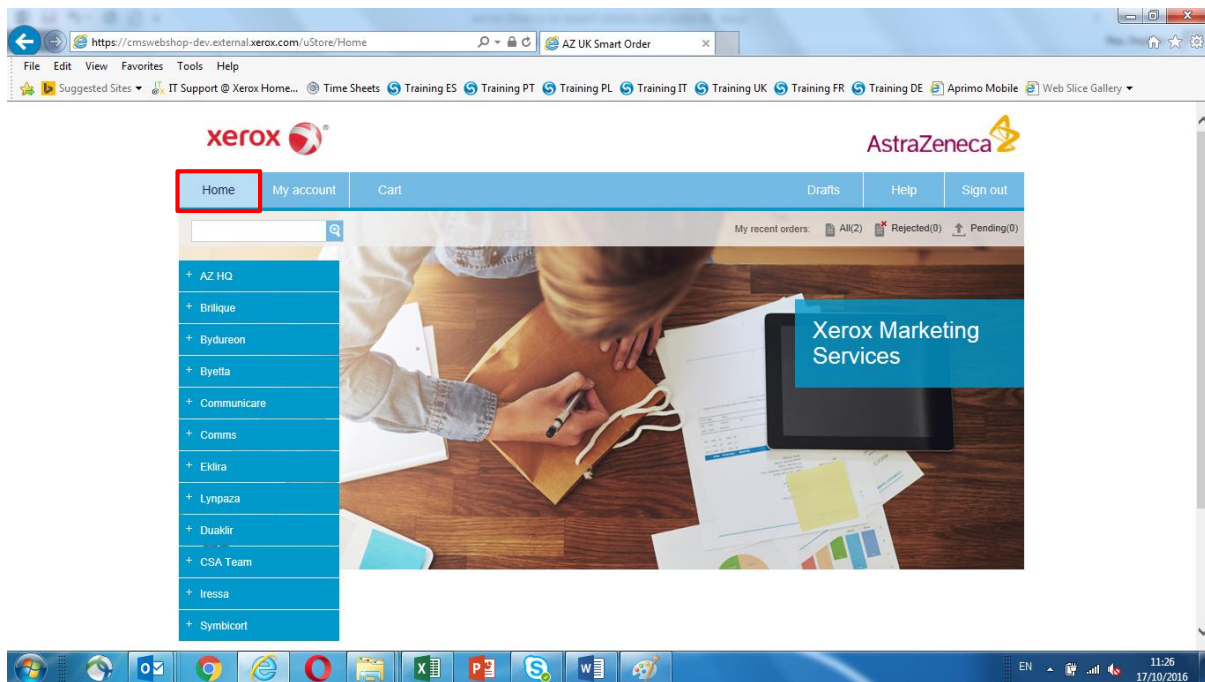
Address	Id	Product name	No. of units	Status	Tracking
Delivery 1 Elaine Bissell	34796	Bydureon Presenter (UK) January 2016	10 items	Ready to Produce	Standard

Tax: £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



Home **My account** Cart Drafts Help Sign out

My recent orders: All(2) Rejected(0) Pending(0)

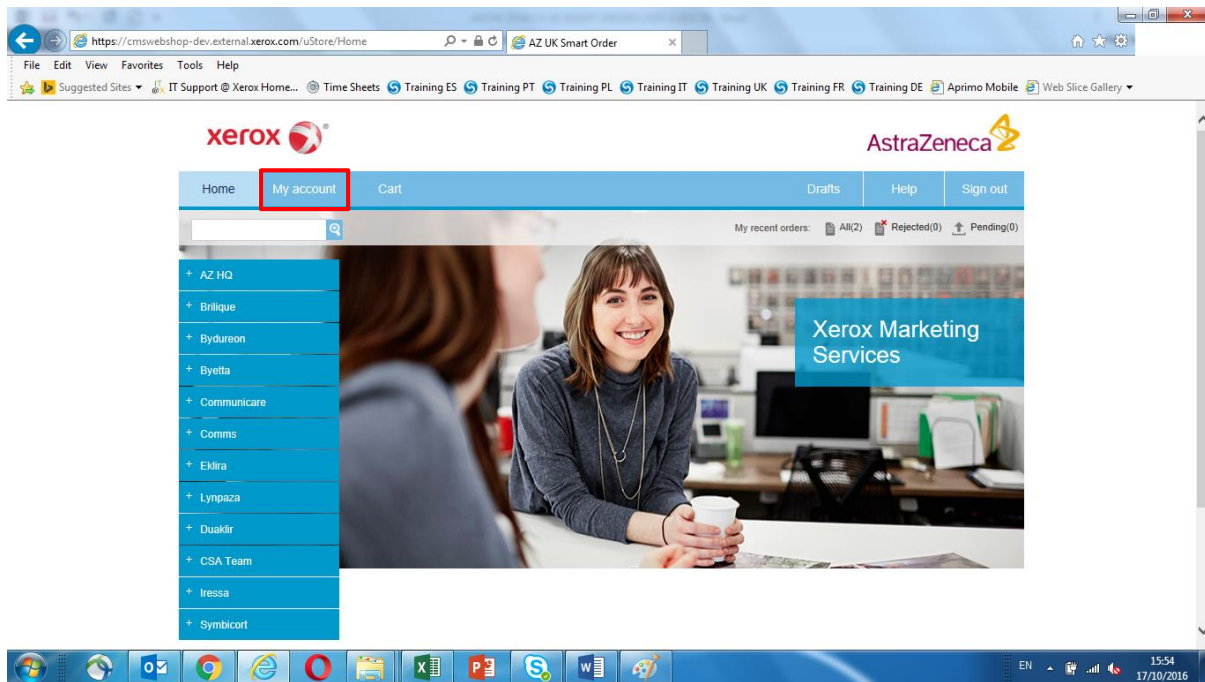
- + AZ HQ
- + Brillique
- + Bydureon
- + Byetta
- + Communicare
- + Comms
- + Eklira
- + Lynpaza
- + Duakir
- + CSA Team
- + Iressa
- + Symbicort

Xerox Marketing Services

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

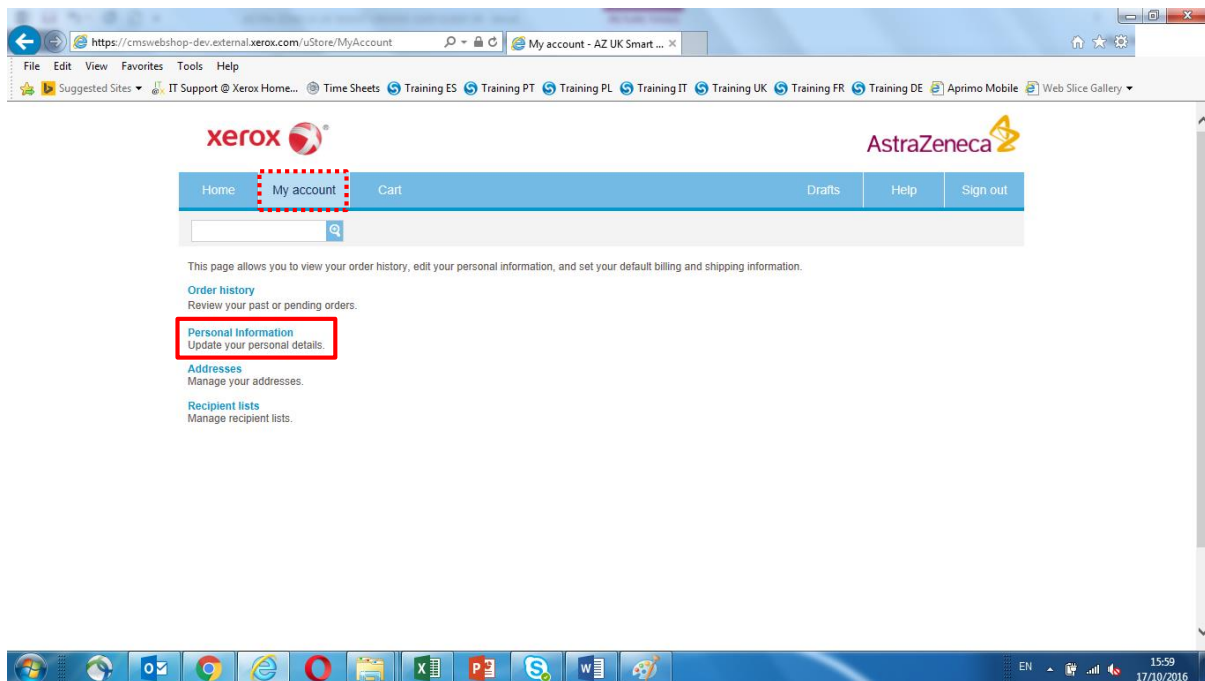
NB: Please refer to the **'Non Standard'** or **'Smart Meeting'** user guides for information on placing these types of request.

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’

Phone Number:

Patient Care area or functional department:

Mobile Number(only AZ No.):

Fax Number:

Job Title:

Department:

Country of Origin:

Country of Invoice:

Delivery Day: Mon Tue Wed Thu Fri Any

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

xerox **AstraZeneca**

Home My account Cart Drafts Help Sign out

Values saved successfully

Email Address:

First Name:

Last Name:

Cost Centre:

Select Location:

Phone Number:

Patient Care area or functional department:

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’](#).