

Customer User Guide Primary Care V1.5



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#### **Overview**

This document contains instructions for customers on how to use the CH2 Direct website.

New cash customers who pay be credit card are able to create an account online and receive an email confirming their login details.

Existing commercial accounts can enable their account by providing the account number, contact name, email address and password.

The customer's login ID is the account number or email address. A parent can login and place orders on behalf of multiple child accounts.

The password, email address and contact name can be updated by the customer. Instructions for doing so follow later in this document.

#### **Create a New Cash Account**

Customers who pay by credit card online can create a CH2 account online. They will receive an email containing their login details within a few minutes and can then login and place orders.



Select 'Create a New Cash Account"



The fields marked with • are required fields and must contain data. The contact name is not required but is used to mark emails to the attention of this person.

Complete all required fields and click **Submit**.

An email containing the account number and login details will be sent within a few minutes. The customer can then login and place an order.

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### **Enable an Existing Commercial Account**

Customers who currently have a commercial account with CH2 can create a CH2 Direct login and place orders online.



Select 'Enable an Existing CH2 Commercial Account'.



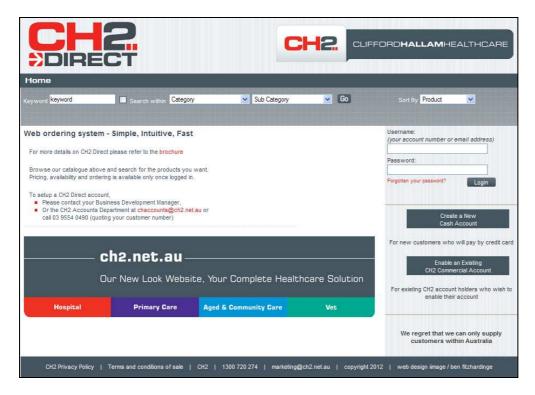
All fields are mandatory. The password must be at least 6 characters and contain at least one numeric.

Complete all fields and click Submit.

An email containing the customer's login details will be sent within a few minutes. The customer can then login and place orders.

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### **Logging into CH2 Direct**



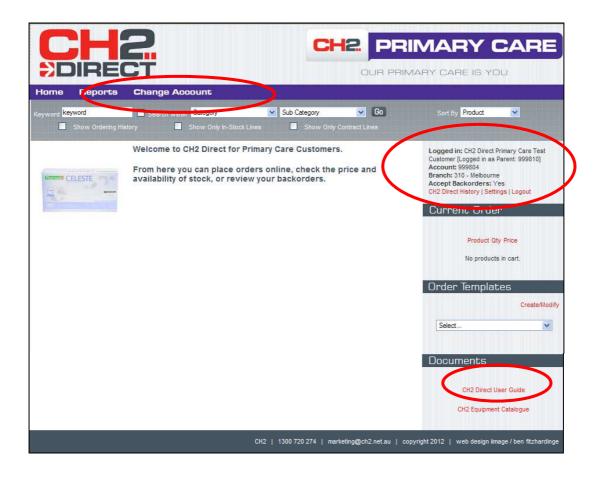
Enter your customer number or email address in the Username Field Enter your password and click **Login**.



When logged in as a parent account, all child accounts are listed for your selection. Only when a child account has been selected, can you perform searches and place orders.

When logged in as a single account, this page will not be displayed.

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The CH2 Direct User Guide is available under Documents.

When logged in as a parent account, the child account can be changed here.

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## **Searching for Products**

Products can be found using the following methods:

- Choose a category from the drop down list, click Go
- Choose a category and a sub category from the drop down lists, click Go
- Use a keyword, click **Go**
- To use a Keywords in conjunction with category and sub category, select, Search within, click Go
- Keywords can be part of a description and do not require wildcards Inclusive search When searching for supplier part number of 08-888, 08-888NP products will be found.
- Plural search So that glove finds gloves and vice versa
- Logical and "nitrile gloves" will return a result where both words appear somewhere together in any searched field.

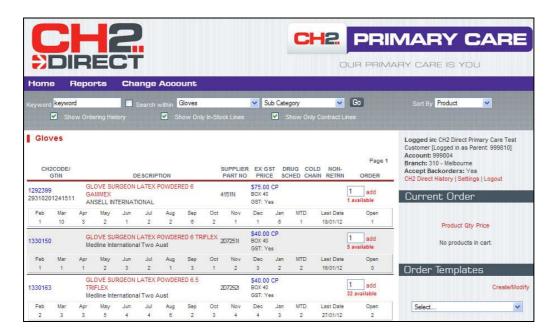




Check boxes allow you to display:

- Order History
- Only in Stock Lines
- Only Contract lines

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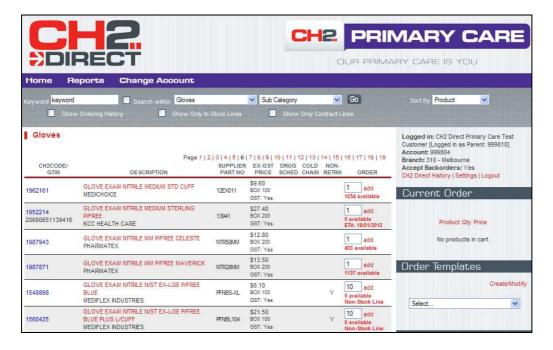


The example above shows all three check boxes checked.

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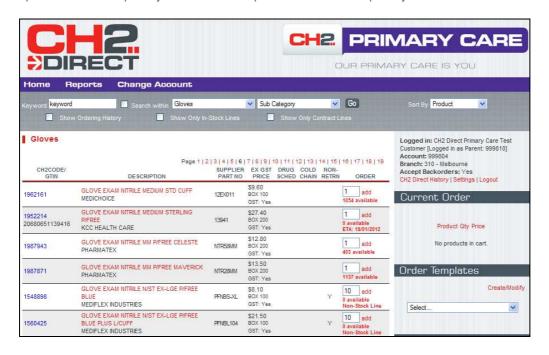
## **Quantity Available**

The quantity available and status of: 'Available', 'On Order' or 'Non Stock Line' are displayed against each product. The quantity available is updated every 5 minutes.

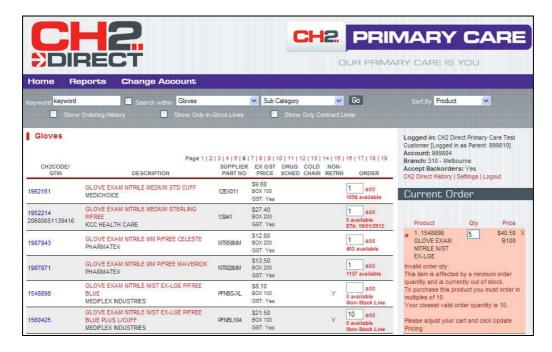


#### **Minimum Quantities**

If a product has a minimum order quantity set, the default quantity shown here will reflect that quantity. The default quantity will also take into account any remnants currently in stock. An order can be placed for a quantity up to the available quantity and then in multiples of the minimum quantity.



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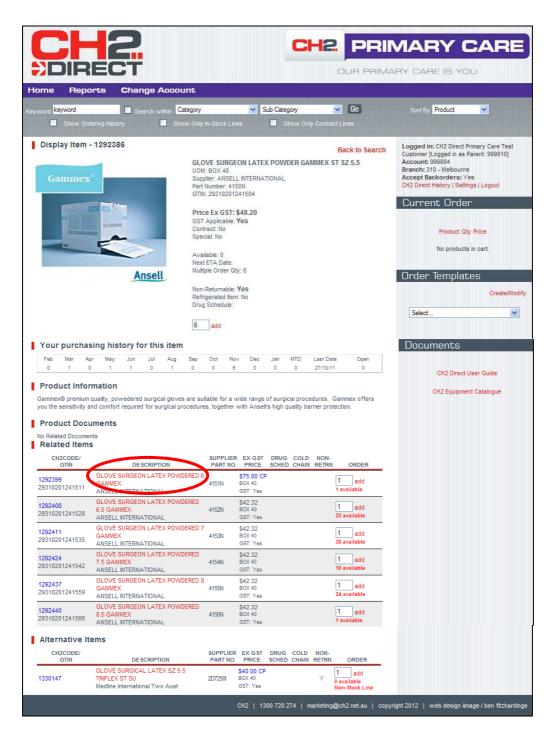
When an incorrect quantity is added to the cart and an error message is displayed, explaining what the correct quantity should be. This must be corrected before proceeding.

#### **Product Details**



The presence of a camera icon indicates that an image is available for this product.

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Click on the product description in the search screen to display the full details for a product. This includes s image (if available), your purchasing history, and related and alternative products. Items can be added to the cart from this screen or you can choose to 'Back to Search'.

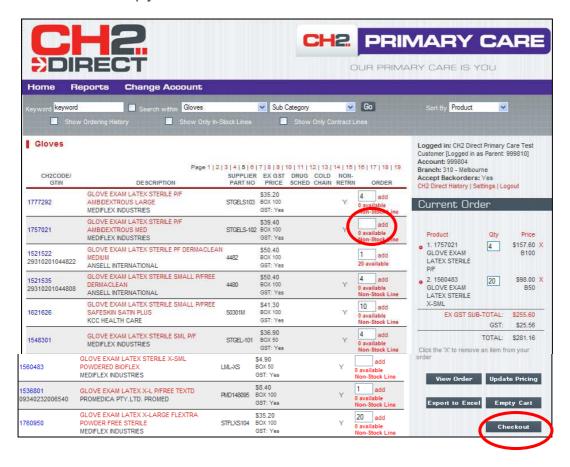
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### **Placing an Order**

Once the required product has been located, change the quantity if necessary and click the **Add** button next to that product. The product will appear in a list under '**Current Order**'.

Continue adding products and when finished, click 'Checkout

**Note**: Products can be deleted from the '**Current Order**' by clicking on the cross to the right of the product or click **Empty Cart** to delete all items from the cart.



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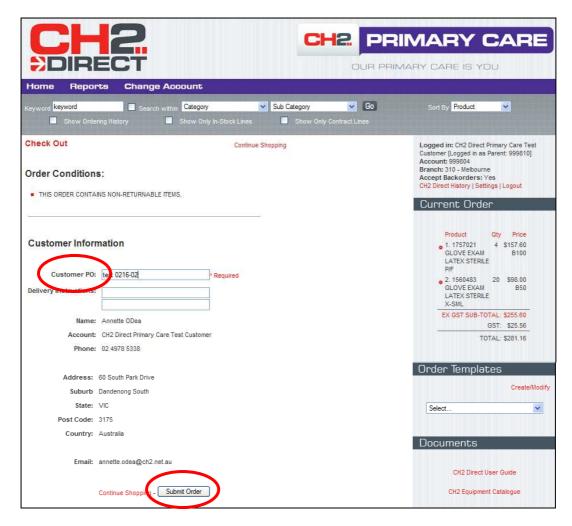
#### Checkout Screen - Commercial Account

The order confirmation screen is displayed, showing the customer and order information.

Enter the Customer PO (Purchase Order) field, this is a mandatory field, but if you don't use PO numbers, may be a date, or name of the ordering person (or anything else that assists both you and CH2 to identify the order).

Enter Delivery Instructions if required. This can be up to 28 characters per line.

#### Click Submit Order



A confirmation email will be sent to the customer. It will contain details of exactly what products are available for delivery. When a parent is placing an order on behalf of a child account, the confirmation email will be sent to both the parent and child unless the email addresses are the same.

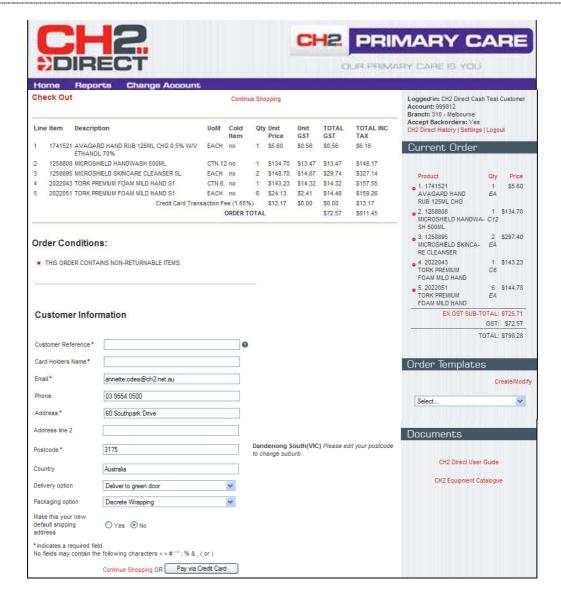
After submitting an order, a summary of your order can be printed



Select the 'Home" button to return to the start

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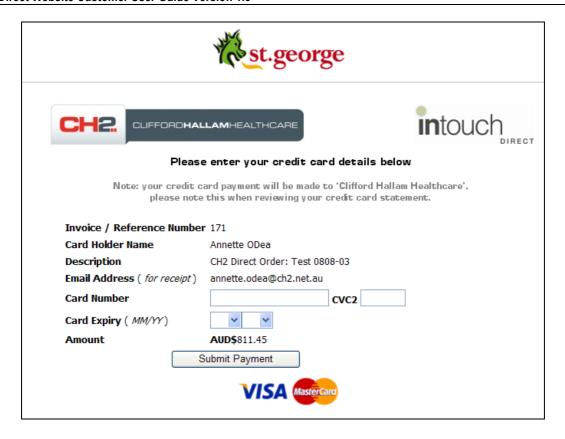
### **Checkout Screen - Cash Customer**



A summary of the products purchased and any additional charges such as freight and merchant fee are displayed at the top of the screen.

Complete the customer reference (this can be anything up to 25 characters that identifies your order) and the Card Holders Name; click 'Pay via Credit Card.

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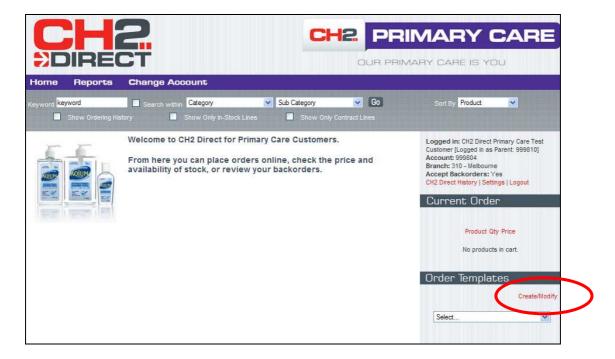


Enter your credit card details on the St George payments page and click 'Submit Payment'.

A receipt will be emailed to the customer and displayed on the screen where it can be printed.

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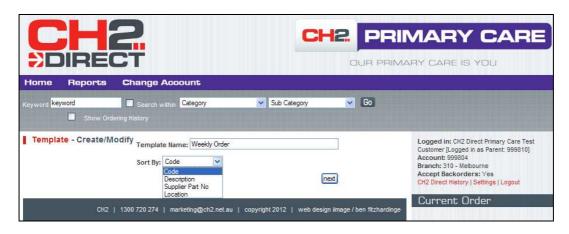
## **Creating a New Order Template**



Select 'Create/Modify' from beneath the' Template' label



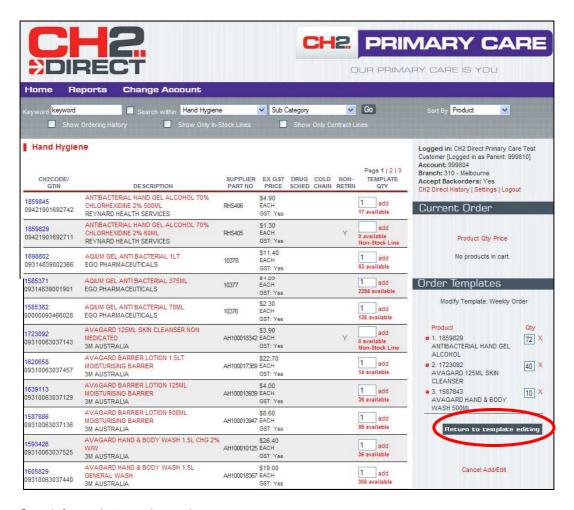
Select 'Create a new one'



Type a meaningful name in the Template Name field

Select a sort sequence from the drop down list if required and click Next

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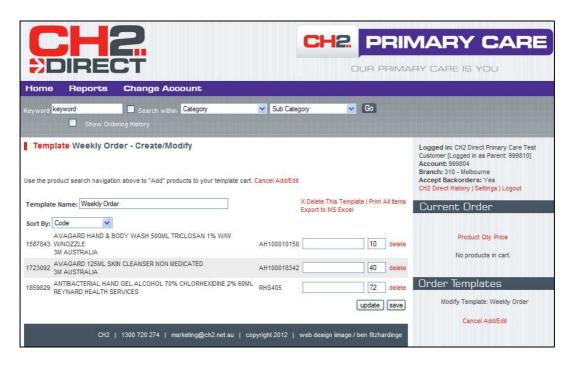


Search for products as shown above

Amend the quantity against a product if required and click add for that product

When all products have been added, click 'Return to Template Editing.

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The order template details are displayed. Locations can be added for internal use.

Click 'Save'.

Select the 'Home' button to return to the start.

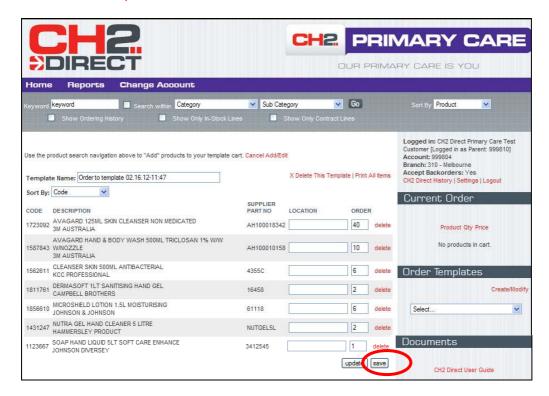
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### **Creating a Template from an Order**

After an order has been submitted, the order contents can be used to create a template.



Select 'Build a Template from this Order'



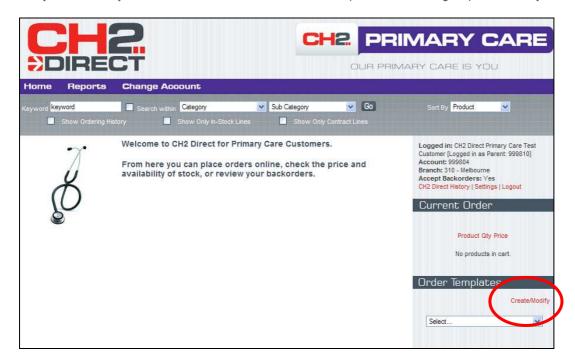
You can add products, delete products and edit locations.

Click Save, Click Home.

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### **Amending a Template**

It may be necessary at times to add or delete items from a template; the following steps will show you how.

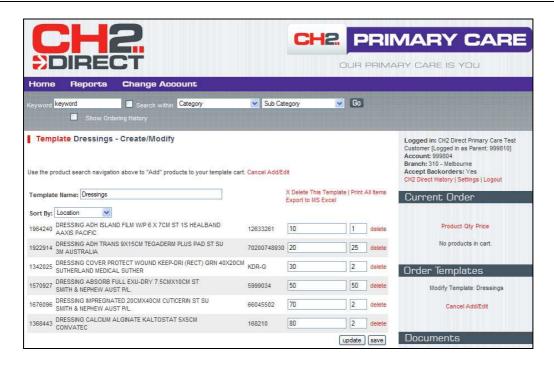


Select 'Create/Modify' from below Order Templates

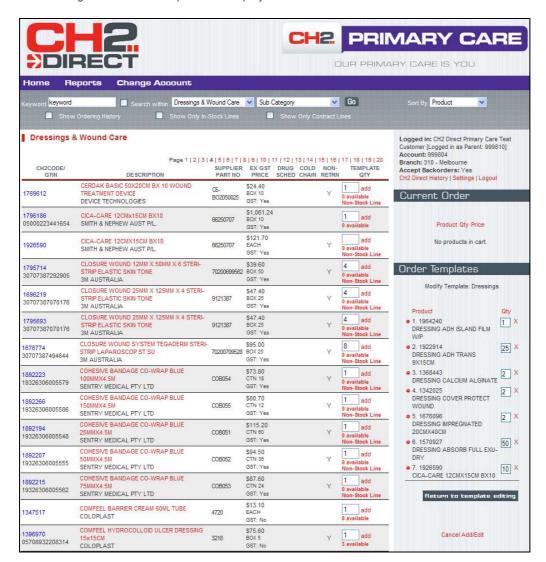


Select the template from the drop down list

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The existing items for the template are displayed



Search for items to add to the template

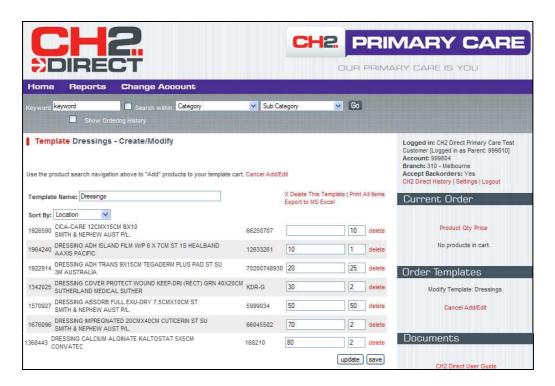
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The items that already exist on the template are displayed in the right hand pane under **Order Templates** 

Click add next to the items you wish to add to the template

As items are added, they are displayed under **Order Templates** on the right side of the screen.

When all items have been added, click Return to Template Editing.



Locations can be added or changed and the sort sequence can be selected.

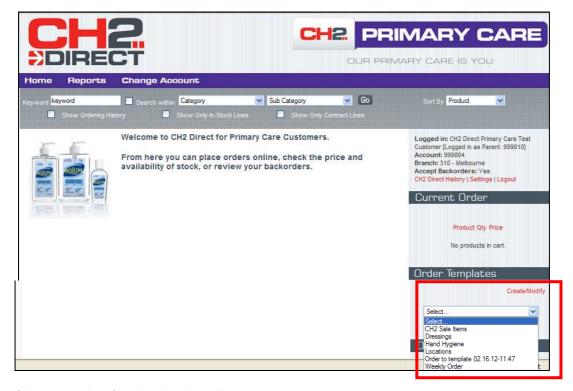
#### Click Save

To delete items from the template, select the template as shown above

Click the delete button next to the item

Click Save

### Using a Template to Place an Order



Select a template from the drop down list.

Templates that begin with CH2 are automatically created and refreshed each night. They are maintained by CH2, and cannot be edited.

The CH2 Order History is compiled using 9 months of order history for the customer

The CH2 Sale Items contains item that are currently on sale

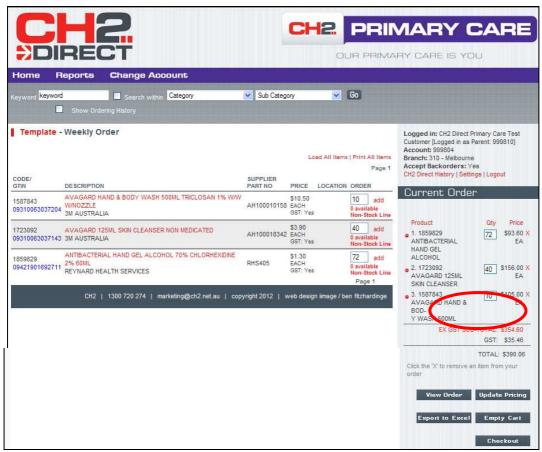
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The template details are displayed.

Alter the quantity if required

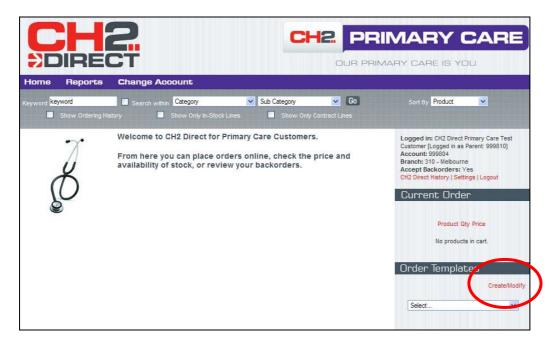
Click 'add' against the required products or select the option to "Load All Items"; these will be added under 'Current Order'



When all products have been added to the order, click 'Checkout'

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## **Export a Template to Excel**

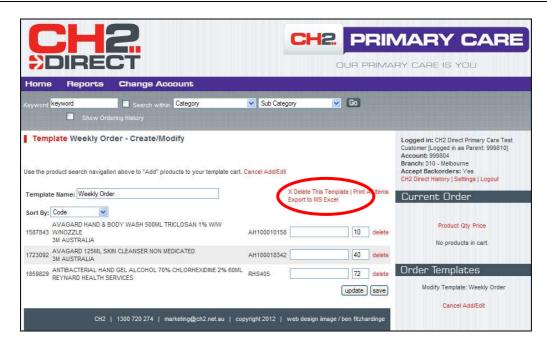


#### Select 'Create/Modify'

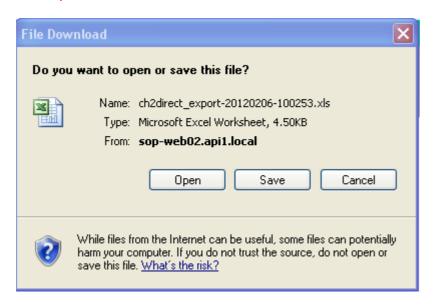


Select a template from the drop down list

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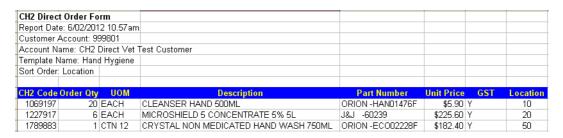


#### Click Export to MS Excel



Click Open or Save and name the file

Tip: Save this file to your C drive for easy access.



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### **Export an Order to Excel**

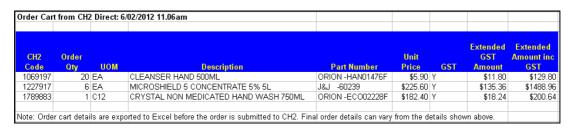


To export the current order to Excel, select the Export to Excel button



Select Open or Save and name the file

**<u>Tip</u>**: Save this file to your C drive for easy access.



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### Reports

#### **Backorder Report**

An up-to-date listing of all items you have on order, where CH2 are currently out of stock. This report is sorted by CH2 item code and lists your order date and order number; it is updated hourly.

The latest ETA from our supplier is also provided as a guide for when CH2 expects to receive the stock.

The Backorder Report is displayed on screen and can be printed or exported to Excel.



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#### **Open Orders Report**

Track the progress of your orders. This is a list of all your open orders with CH2, recently placed orders may take up to an hour to appear on this report.

The Open Orders Report is displayed on screen and can be printed or exported to Excel.

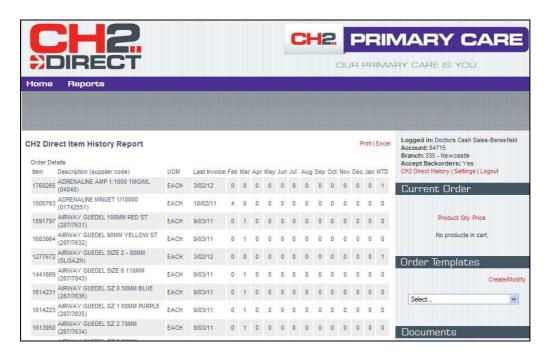


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#### **Item History Report**

A full list of all items you have purchased through CH2 in the last 12 months, with month by month purchase quantities. Your last invoice date and supplier part number are also included. The 'View' option will only display usage for the last six months where the print and excel options have the full twelve months available.

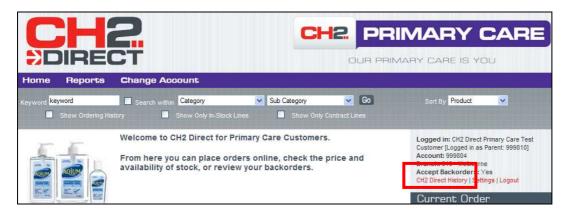
If this report is large, or where sorting, searching or filter is required, then an export to Excel should be the option of choice.



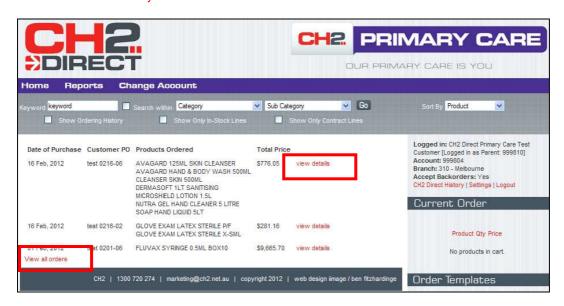
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### **Viewing Order History**

You can view the history of orders previously placed through CH2 Direct



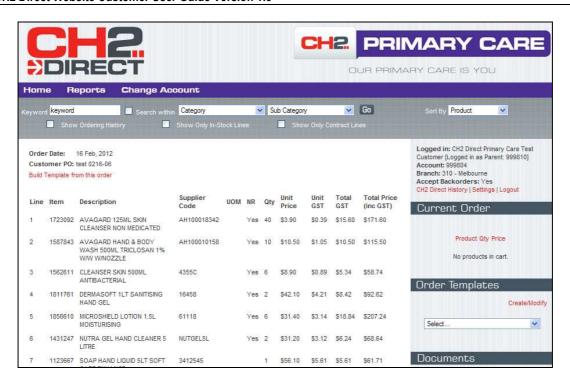
Select 'CH2 Direct History' from beneath the customer information



The last 5 orders are displayed. Select 'View all orders' to see all

To view an order in greater detail, select 'View Details'

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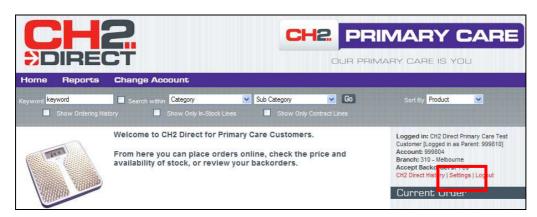


Order details are displayed. Click 'CH2 Direct History' to return to the list or 'Home' to return to the start

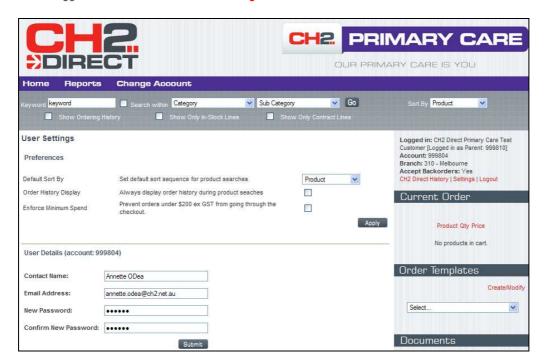
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#### **Settings**

Customers can change their password, email address and contact name, and set their display preferences.



When logged into CH2 Direct, select 'Settings' under the account details section.



This will open a screen which allows the customer to update the contact name, email address and password.

You can also set the following preferences:

- Set the sort sequence to Product, Code, GTIN, Supplier or Supplier Number.
- Display the order history for all products
- Enforce the minimum order Spend of \$200. Orders below this amount will attract freight charges. The order will not be allowed to proceed to checkout until the total is \$200 or greater.

Make you selection(s) and click Apply

Special characters are not allowed in the contact name or password. A message will display if illegal characters are used.

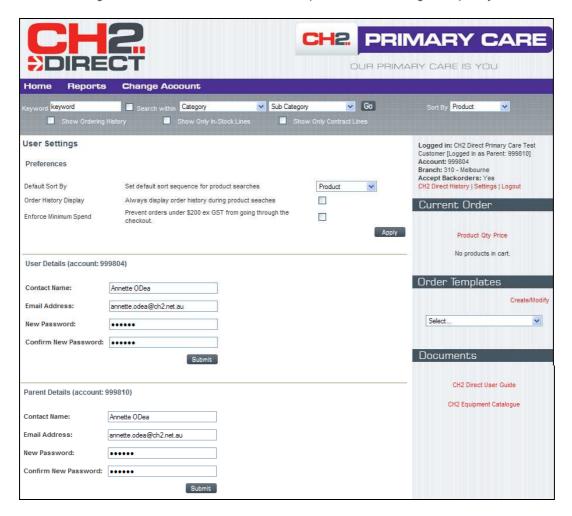
The password must be entered twice to verify the change before being submitted.

Click 'Submit'. The changes are updated on the website immediately.

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A confirmation email is sent to the customer with the updated details.

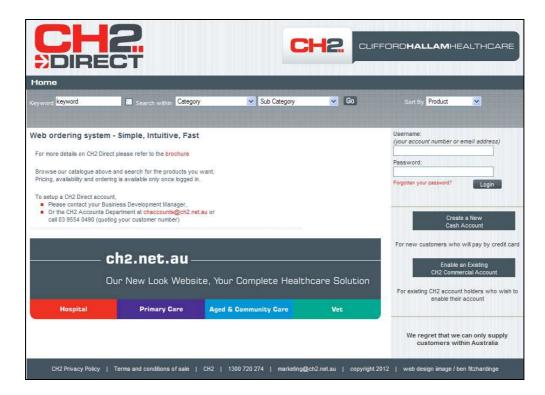
In following Best Practice, it is recommended that passwords are changed frequently.



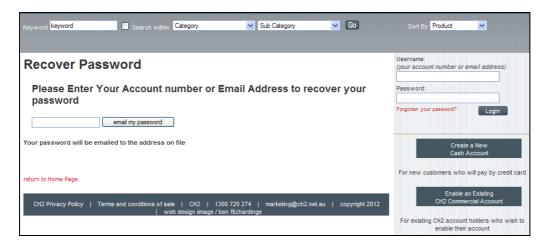
When logged in as a parent account the option also exists to change the details for the parent. The preferences apply to the child account.

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### **Retrieving a Forgotten Password**



From the Home page, click on 'Forgotten your password?'



Enter your account number or email address and click email my password

Note: Your email address can only be used if it is unique to one account.

An email will be sent immediately.

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