



Ordering Functions

CREATING & SUBMITTING A STANDARD ORDER

STEP 1 - In the **Search** field, type the product description, ABC 6-digit or 8-digit item number, NDC, UPC, Product Description or Generic Name.

Note: You can use * as a wildcard when searching. Typing an asterisk (*) at the beginning of each set of search criteria will also search the **Generic Name** field.

STEP 2 - Click **Search**.

STEP 3 - In the **Qty** field on the **Search Results** screen, type the quantity of the product you would like to order.

STEP 4 - Click

STEP 5 - Select "Standard Order" on the **Order Selection** window.

Order Selection

You must first create an order before you add a product.

- C2 Order
- CSOS Order
- Standard Order
- Price Sticker & Shelf Label

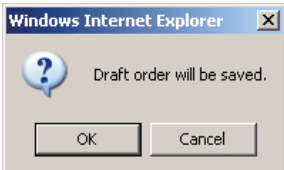
STEP 6 - Click

STEP 7 - Click the **Current Order** tab. **Current Order**
246.09 USD

STEP 8 - In the **PO Number** field, type the number of your PO.

STEP 9 - Click

STEP 10 - Click **OK**.



STEP 11 - To add more items to the order, click

STEP 12 - Click

Note: When you submit your order, ABC PassPort will automatically do a duplicate item check. This process will review the entire order for duplicates. Each duplicate item will be consolidated into a single line item, which will be highlighted in yellow.

A manual duplicate check can also be completed at any time by clicking the **Duplicate Check** button.

For an item to be considered a "duplicate" on an order or PO, the **Sold-to, Product ID, PO, Department, SHC, and GL Code** must be the same.

Check for Duplicates: (Standard Order) Un-submitted

Line	Product ID	Order Qty	Available Quantity	Product Description	Retail Price	Retail Price Override	Temp	Acq Cost
50	10098855	19	EA	58	NAFOLLIN 1 GM VL 10	0	0	139.35 USD / EA
10	10098855	14	EA	58	NAFOLLIN 1 GM VL 10	0	0	139.35 USD / EA
20	10090050	5	EA	50	NAFOLLIN 1 GM VL 10	0	0	139.35 USD / EA
30	10054323	12	EA	50	AGGRENIX 200 (25 MG ER CAP 60	0	0	216.33 USD / EA
40	10054323	10	EA	50	AGGRENIX 200 (25 MG ER CAP 60	0	0	216.33 USD / EA
50	10054323	2	EA	50	AGGRENIX 200 (25 MG ER CAP 60	0	0	216.33 USD / EA

STEP 13 - Review and make any necessary adjustments to the consolidated order line(s).

STEP 14 - Click the **Accept Total Quantities** button.

Note: You will notice that the line numbers in your order will change as a result of the duplicate check adjustments made. In the example below, you will see that the line numbers 10, 20, 30 and 40 reflected in the screen shots above are now consolidated into two new line numbers: 50 and 60.

Order (Standard Order) In Process

Line	Product ID	Order Qty	Available Qty	Alt Search	Product Description	Retail Price	Retail Price Override	Temp	Total Item Extended Cost	Delete
50	10098855	19	EA	58	NAFOLLIN 1 GM VL 10	0.00	0.00		2,647.85 USD 139.35 USD / EA	
60	10054323	12	EA	50	AGGRENIX 200 (25 MG ER CAP 60	0.00	0.00		2,595.96 USD 216.33 USD / EA	



Ordering Functions

CREATING & SUBMITTING A DROP SHIP ORDER

STEP 1 - In the **Search** field, type the product description, ABC 6-digit or 8-digit item number, NDC, UPC, Product Description or Generic Name.

Note: You can use * as a wildcard when searching. Typing an asterisk (*) at the beginning of each set of search criteria will also search the **Generic Name** field.

STEP 2 - Click **Search**.

Note: Drop ship items will be indicated with a magenta triangle.

STEP 3 - In the **Qty** field on the **Search Results** screen, type the quantity of the product you would like to order.

STEP 4 - Click .

STEP 5 - Select "Standard Order" on the **Order Selection** window.

Order Selection

You must first create an order before you add a product.

C2 Order
 CSOS Order
 Standard Order
 Price Sticker & Shelf Label

STEP 6 - Click .

STEP 7 - Click the **Current Order** tab. Current Order
246.09 USD

STEP 8 - In the **PO Number** field, type the number of your PO.

PO Number * :

STEP 9 - Click the **Edit** hyperlink next to the orange drop ship message.

Delete	Line	U	Product ID	Order Qty	Avail Qty	Alt Search	Product Description	Total Item Extended Cost
<input type="checkbox"/>	10		10001475	1	EA	G C T	CE_HUMATE-P ASD 2400 UNITS KIT	7.00 USD 7.00 USD / EA

⚠ Please enter required information for Drop Ship [Edit](#)

STEP 10 - Type the drop ship information requested in the **Drop Ship Instructions** field.

Line	U	Product ID	Order Qty	Avail Qty	Alt Search	Product Des
10		10000610	1	EA	G C T	GNP Ibufrofen Bn

Department Code :
 Contract Number :
 GL Code :
 Contract Name :
 Contract Validity : -

DropShip Instructions: Date of surgery|
Doctor's Name:
Patient DOB:

STEP 11 - Click the **Update** button.

Note: To edit the drop ship instruction information, click the **Edit** hyperlink.

STEP 12 - Click .

Note: A drop ship message will display.

⚠ This order contains drop ship materials. Drop ship material pricing is subject to change due to market conditions, please

STEP 13 - Click the **Confirm** button.

STEP 14 - Click .



Ordering Functions

ORDERING PROMOTIONAL ITEMS

Promotional items available for order are marked with a on the item line. Promotional and non-promotional items can be added to the same order.

STEP 1 - Search for desired items.

STEP 2 - Type the desired quantity of each item, including any desired promotional items in the **Qty** field.

U	Qty	Avail	Alt Search	ABC #	Product Description	Size	
	17	EA	100+	G C T	10026844	ADVIL 200 MG GCP 100_RK	100
	20	EA	100+	G C T	10031339	ADVIL 200 MG GCP 200	200
	5	EA	100+	G C T	10026840	ADVIL 200 MG GCP 24	24
	3	EA	100+	G C T	10026841	ADVIL 200 MG GCP 50	50

STEP 3 - Click **Add to Order**.

STEP 4 - Click the **Current Order** tab.

STEP 5 - Click the checkbox to the right of the **Promotional Product** message(s) to ensure the item is processed under the promotion program.

Promotional Product: Shipping start date 03/13/2013. Order this line on Promotion:

*Note: If you do not click the checkbox to have the item(s) processed as **Promotional Product**, the item will be ordered normally without promotional event pricing. The shipping start date for the Promotional Product is noted and may differ from the remainder of the order.*

STEP 6 - Click **Submit**.

STEP 7 - Select the "Yes" or "No" radio button to confirm if the promotional item was referred to you by an account manager.

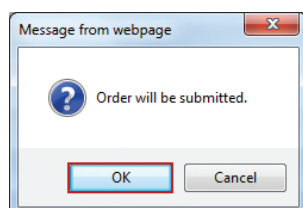
Additional Order Data

Promotion referred by account manager Yes No

Delete Line U Product ID Order Qty

STEP 8 - Click **Submit**.

STEP 9 - Click the **OK** button.



Note: Promotional items are placed on a new order number with the same PO# after submitting. The order numbers can be cross referenced in the header section of each individual order.

Order (Promo Event Order) 4400009340 from 04/30/2013 1:54 PM

Status: Submitted	Shipping: 01 - Standard ABC TC	Sold to: Sample Customer (010004890)
PO: TESTPO2		Address: ARCH STREET Philadelphia, PA 19107 US
Invoice:		
Related Order: 4400009338		

SEARCHING FOR PROMOTIONAL ORDERS

STEP 1 - Click the **Ordering** tab.

Home
Ordering
Receiving

STEP 2 - Select "Promo Event Order" from the **Order Type** drop down list in the *Transaction Search* section.

Transaction Search

Search For: Orders

Order Type: Promo Event Order

Status: Any

Creation Date: C2 Order, CSOS Order, Standard Order

ID Type: Backorder, Price Sticker & Shelf Label, Autoship Order, Promo Event Order

Note: You may use additional search criteria to further limit the search results as desired.

STEP 3 - Click the **GO** button.

STEP 4 - Click the desired **Promotional Order** hyperlink in the **Results** section.

2 Results Found

Order Status Date Created	Order Type Order Number	Order Source: PO
Submitted 04/30/2013	Promotional Order 4400009338	Web Orders TESTPO
Submitted 04/30/2013	Promotional Order 4400009340	Web Orders TESTPO2

STEP 5 - View the displayed **Status** details of the promotional order and the **Related Order** number.

Order (Promo Event Order) 4400009340 from 04/30/2013 1:54 PM

Status: Submitted	Shipping: 01 - Standard ABC TC	Sold to: Sample Customer (010004890)
PO: TESTPO2		Address: ARCH STREET Philadelphia, PA 19107 US
Invoice:		
Related Order: 4400009338		



Ordering Functions

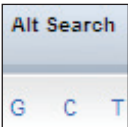
ACCESSING THE LEGEND

STEP 1 - On the **Search Results** screen, **Current Order** and **Orders and Templates** tab click, **Icon Legend** at the bottom of the window.

REPLACING AN ITEM WITH A SUBSTITUTE

STEP 1 - Search the catalog for the desired product.

STEP 2 - On the **Search Results** screen, click **G**, **C**, or **T** (generic, contract or therapeutic) in the **Alt Search** column for the category of substitutes you would like to display.



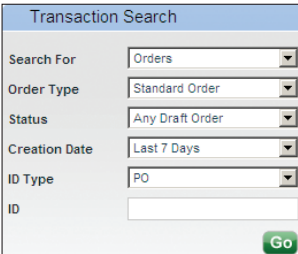
STEP 3 - On the **Equivalents Results** screen, type the quantity of the item you would like to purchase in the **Qty** column.

STEP 4 - Click **Add to Order**.

SEARCHING TRANSACTIONS - ORDERS

You can use any combination of the criteria displayed to complete your search.

STEP 1 - Under **Transaction Search** on the **Ordering** tab, select "Orders" from the **Search For** drop down list.



STEP 2 - Select the type of order you would like to locate from the **Order Type** drop down list.

STEP 3 - Select the order status from the **Status** drop down list.

STEP 4 - Select the order creation timeframe from the **Creation Date** drop down list.

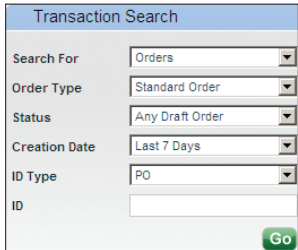
STEP 5 - Select the order identifier you would like to use from the **ID Type** drop down list.

STEP 6 - Type the identifier value in the **ID** field.

STEP 7 - Click **Go**.

EDITING AN ORDER

STEP 1 - Under **Transaction Search** on the **Ordering** tab, select "Any Draft Order" from the **Status** drop down list.



STEP 2 - Click **Go**.

STEP 3 - Select the blue hyperlink of the order you would like to edit.

STEP 4 - Click **Change**.

STEP 5 - Make the needed edits to the line items you would like to change.

STEP 6 - Click **Update**.

STEP 7 - Click **Save & Close** or **Submit**.

*Note: It is important to click **Save & Close** as it will provide an order number.*

DELETING AN ORDER

STEP 1 - From the **Ordering** tab, select the order you would like to delete from the order list on the left side of the window.

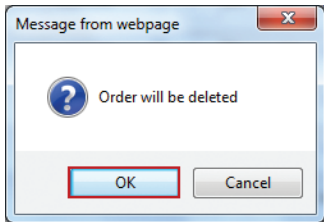
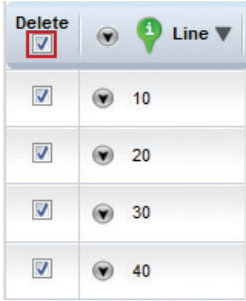
Note: A submitted order cannot be deleted.

STEP 2 - Click **Change**.

STEP 3 - Click the **Delete** check box in the column header row to select all lines in the order.

STEP 4 - Click **Delete**.

STEP 5 - Click the **OK** button to confirm deletion of the entire order.





Ordering Functions

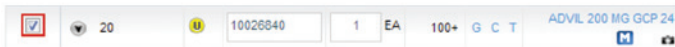
DELETING ITEMS FROM AN ORDER

STEP 1 - Search using *Transaction Search*, on the **Ordering** tab, to locate the order from which you would like to delete items.

Note: Items cannot be deleted from a submitted order.

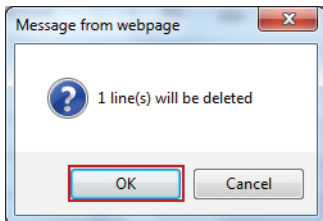
STEP 2 - Click **Change**.

STEP 3 - Click the check box to the left of the line item(s) to be deleted.



STEP 4 - Click **Delete**.

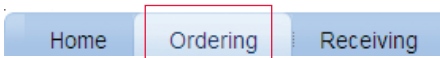
STEP 5 - Click the **OK** button to confirm deletion of the selected items.



Note: The selected item(s) are now removed from the order.

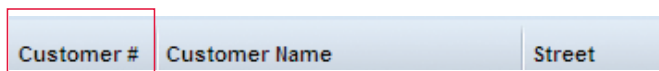
CHANGING ORDERING ACCOUNT

STEP 1 - Click the **Ordering** tab.



STEP 2 - Click the account name that appears in blue in the upper right-hand side of the window.

STEP 3 - Select the desired customer number from the **Customer #** column.



SEARCHING TRANSACTIONS - ORDER TEMPLATES

You can use any combination of the criteria displayed to complete your search.

STEP 1 - Under *Transaction Search* on the **Ordering** tab, select "Order Templates" from the **Search For** drop down list.

STEP 2 - Select the type of order template you would like to locate from the **Order Type** drop down list.

STEP 3 - Select the creation timeframe from the **Creation Date** drop down list.

STEP 4 - Select the order identifier you would like to use from the **ID Type** drop down list.

STEP 5 - Type the identifier value in the **ID** field.

STEP 6 - Click **Go**.



Ordering Functions

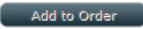
COMPARING PRODUCTS

STEP 1 - From the **Search Results Screen**, click the **compare** checkbox. (You can select up to 5 products you would like to compare).

STEP 2 - Click  .

STEP 3 - View the comparisons.

STEP 4 - Click the **EA** radio button of the product you would like to add to your order.

Product Comparison		
Description	ZOCOR 10 MG TAB 90	ZOCOR 20 MG TAB 30
ABC #	10010297	10012216
Supplier	MERCK & CO / USHH PDP	MERCK & CO / USHH PDP
Contract		
Drug Form Cost	#####	###
Acq Cost	####	###
Retail Price :	0	0
Division Status :	Stock	Stock
Available	4	0
Select	<input type="radio"/> EA	<input type="radio"/> EA
Qty	<input type="text"/>	

STEP 5 - Type the quantity of the product you would like to order in the **Qty** field.

STEP 6 - Click  .

STEP 7 - Click the **Current Order** tab.

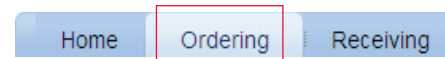
Current Order
246.09 USD

STEP 8 - Click  .

LOCATING RECENT AND UNSAVED ORDERS

Once you have started adding items to an order, if you regularly use the **Update** button located in the order, you will be able to locate the document containing those items under "Unsaved Orders" on the **Home** page of the **Ordering** tab – even if you have not yet clicked **Save Draft**.

STEP 1 - Click the **Ordering** tab.

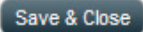


STEP 2 - Click the **Home** page. 

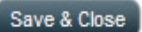
STEP 3 - In the **Action** column, click "Open" next to the document you would like to modify.

Unsaved Orders				
Type	Date Created	PO	Status	Action
Standard Order	09/21/2012 1:45 PM	PO33120120921	Unsaved Draft	Open Delete

STEP 4 - Make modifications as needed.

STEP 5 - To save the order as a draft, click  .

Recently Viewed Orders					
Type	Date Created	Changed By	PO	Status	Orders
C2 Order	04/18/2013 4:43 AM	O. QCV/NOAPRR	TEST90320130418	Pending Approval	5110002303

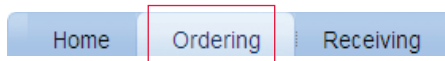
Note: Once you have clicked  , you will be able to locate the order under "Recent Orders" on the **Home** page of the **Ordering** tab.



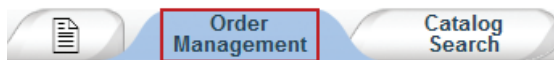
Ordering Functions

APPROVING ORDERS

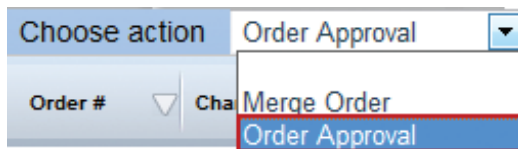
STEP 1 - Click the **Ordering** tab.



STEP 2 - Click the **Order Management** tab.



STEP 3 - Select "Order Approval" from the **Choose action** drop down list.



Note: All orders pending approval will display. This includes orders from ALL accounts to which the user has access.

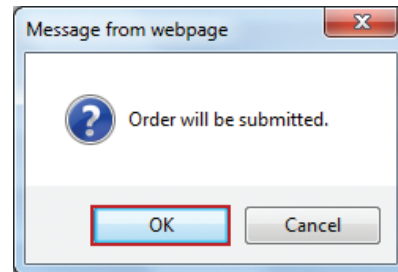
STEP 4 - Click the **Order #** hyperlink of the order to be approved.

Note: The account at the top of the portal window will change to that associated with the selected order.

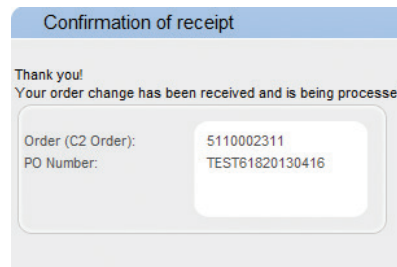
STEP 5 - Click **Change** .

STEP 6 - Edit the order, if needed, and click **Submit** .

STEP 7 - Click the **OK** button.



STEP 8 - View the **Confirmation of receipt** dialog box.



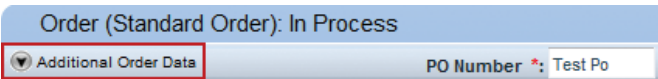


Ordering Functions

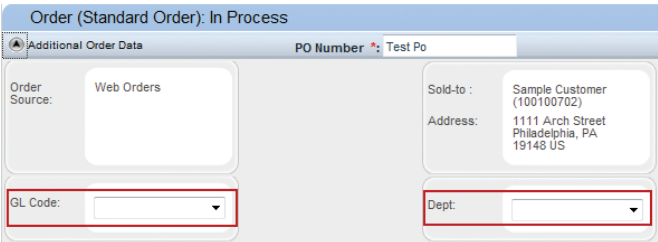
ASSIGNING DEPARTMENT AND/OR GL CODES TO AN ENTIRE ORDER

Department and GL Code requirements are set in the **Business Tools** tab under **Customer Data Maintenance>Preferences** by a user Admin.

STEP 1 - Click the **Additional Order Data** drop down at the top left of the screen within the order.



STEP 2 - Select the desired **Department** and/or **GL Code** from the corresponding drop down list(s) to assign the codes to the entire order.



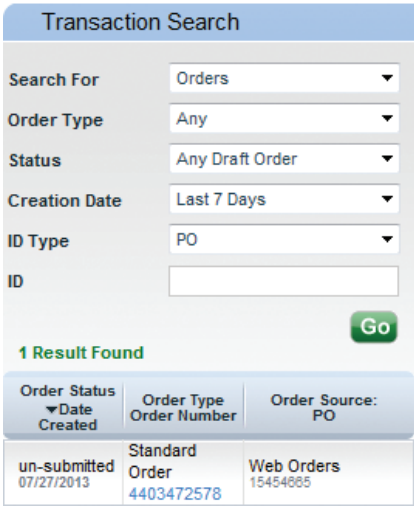
STEP 3 - Proceed with placing the order.

*Note: ABC PassPort does not retain the code selections until you click the **Update** or **Save and Close** button.*

EXPORTING ORDER DETAILS

A standard flat file export is available that can be used by 3rd party systems. The export option is available when an order is in view mode (submitted or un-submitted).

STEP 1 - Search for the desired order for which you would like to export order details using **Transaction Search**.



STEP 2 - Click the desired order hyperlink in the **Results** section.

STEP 3 - Click the **Export** button at the bottom right of the screen.



STEP 4 - **Open** or **Save** the file as desired.

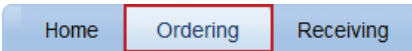
Note: The export displays as a text file.



Ordering Functions

VIEWING USAGE AND HISTORY ACROSS MULTIPLE ACCOUNTS

STEP 1 - Click the **Ordering** tab.

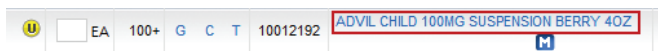


STEP 2 - In the **Search** field, type the Product Description, ABC 6-digit or 8-digit item number, NDC, UPC, or Generic Name of the desired product to view usage and history on.

STEP 3 - Click the **Search** button.



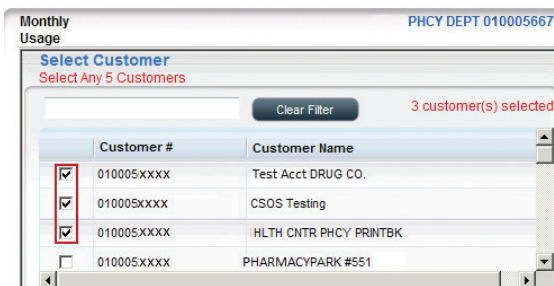
STEP 4 - Click the desired **Product Description** hyperlink.



STEP 5 - Click the **Monthly Usage** tab or the **Purchase History** tab as desired.



STEP 6 - Select up to 5 customer accounts for which you would like to view monthly usage or purchase history.



Note: The currently viewed customer account is not selected by default. Each desired account must be selected to view usage and history results (selection limited to 5 accounts).

STEP 7 - Click the **Submit** button to view the results for **Monthly Usage** or **Purchase History**, as requested.

Note: You may need to scroll down to view all results.

Monthly Usage:

Item Details	Secondary Detail	Pricing / Contracts	Monthly Usage	Purchase History	Medicare / Medicaid	Clinical	Customer Defined
ThoughtSpot_1 0100088390							
Sold-to party	100088065	100088390	100092834	Overall Result			
	ThoughtSpot_5	ThoughtSpot_1	ThoughtSpot_4	Orders	Units	Total USD	Orders Units Total
24 months	5 3 EA	\$ 14.46	4 4 EA	\$ 16.50	1 1 EA	\$ 4.22	10 8 EA \$
12 months	3 1 EA	\$ 6.20	1 1 EA	\$ 4.22	1 1 EA	\$ 4.22	5 3 EA \$
JUL 2013							
JUN 2013							
MAY 2013							
APR 2013							
MAR 2013							
FEB 2013			1 1 EA	\$ 4.22			1 1 EA \$
JAN 2013	1 -1 EA	\$ -2.68			1 1 EA	\$ 4.22	2 0 EA \$
DEC 2012							
NOV 2012	1 1 EA	\$ 4.44					1 1 EA \$
OCT 2012	1 1 EA	\$ 4.44					1 1 EA \$

Purchase History:

Item Details	Secondary Detail	Pricing / Contracts	Monthly Usage	Purchase History	Medicare / Medicaid	Clinical	Customer Defined
10012192 ADVIL CHILD 100MG SUSPENSION BERRY 40Z							
Detailed Purchase History PHARMACY (X) 0100062414							
Customer ID	Customer Name	Invoice Date	Invoice	Purchase Order	Contract #	Contract Name	In
100062414	PHARMACY (X)	02/21/2012	700823730	0220120TC	#	Not assigned	
100058215	PHARMACY (Y)	12/22/2011	700488319	1221110TC	#	Not assigned	
		12/06/2011	700400195	1205110TC	#	Not assigned	
		11/28/2011	700358132	1125110TAA	#	Not assigned	
100048615	PHARMACY (Z)	10/07/2011	700179625	100611	#	Not assigned	
		08/09/2011	700076157	0808110TC	#	Not assigned	