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 **Add to Order**.

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

**STEP 6** - Click **Create**.

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

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

**STEP 9** - Click **Save & Close**.

**STEP 10** - Click **OK**.

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

**STEP 12** - Click **Submit**.

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

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

*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.

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**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.
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 **Add to Order**.

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

**STEP 6** - Click **Create**.

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

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

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

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

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

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

**STEP 12** - Click **Submit**.

*Note:* A drop ship message will display.

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

**STEP 14** - Click **Submit**.
**ORDERING PROMOTIONAL ITEMS**

Promotional items available for order are marked with a green star 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.

**STEP 3** - Click and 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.

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 .

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

**STEP 8** - Click .

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

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**SEARCHING FOR PROMOTIONAL ORDERS**

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

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

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.

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

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

STEP 4 - Click .

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

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

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.

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.
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 **Compare Selection**.

**STEP 3** - View the comparisons.

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

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

**STEP 6** - Click **Add to Order**.

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

**STEP 8** - Click **Update**.

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.

**STEP 4** - Make modifications as needed.

**STEP 5** - To save the order as a draft, click **Save & Close**.

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

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

Monthly Usage:

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).