

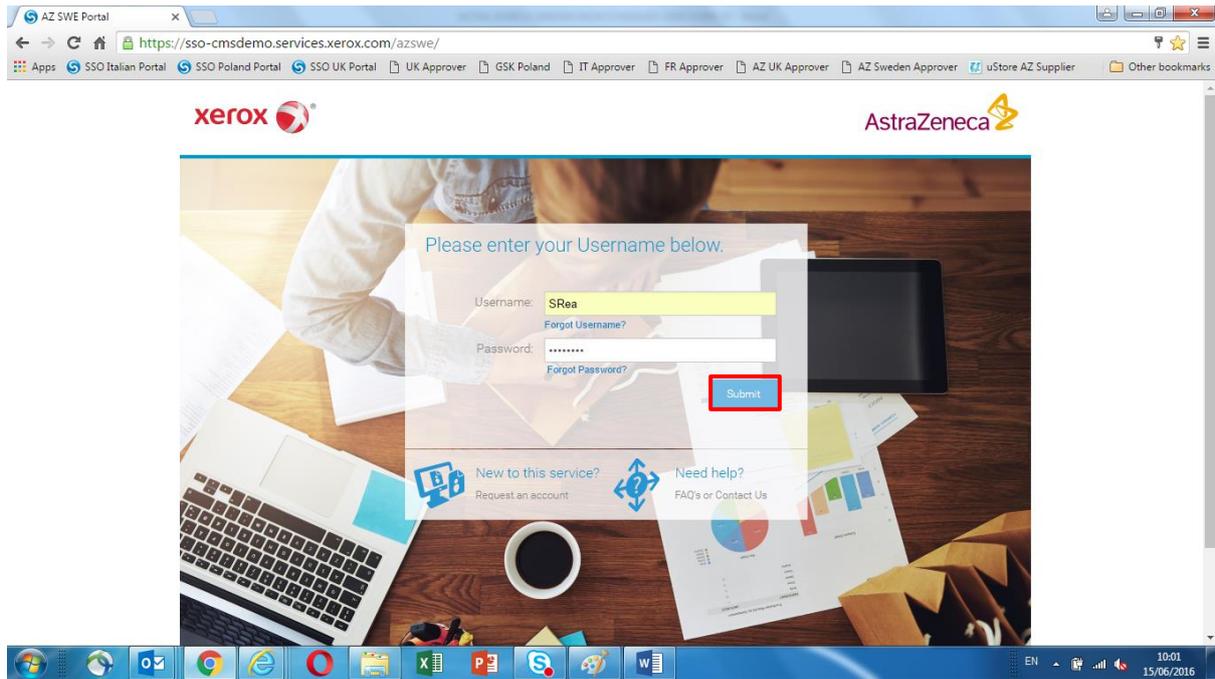
CMS Client Smart Orders User Guide AstraZeneca UK

Version 2 (28/03/2017)

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
FAQ's	12-13

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



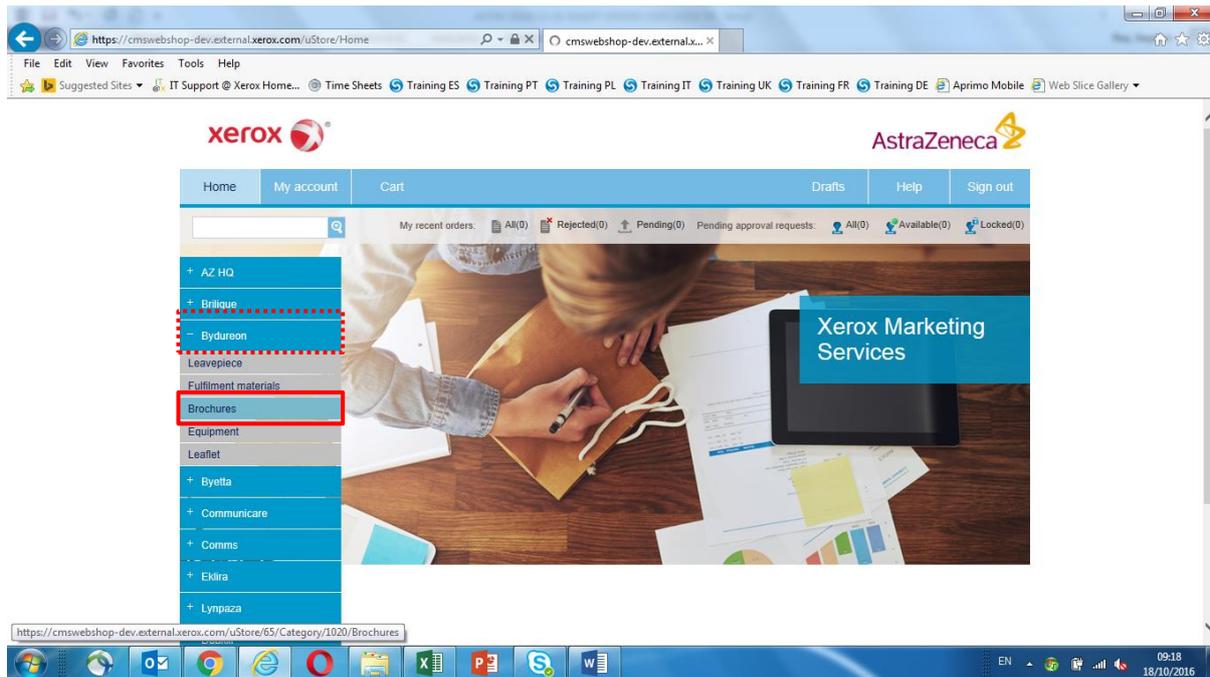
The **Client Homepage** allows access to these areas within the platform.

- 1) **Smart Orders** and
- 2) **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

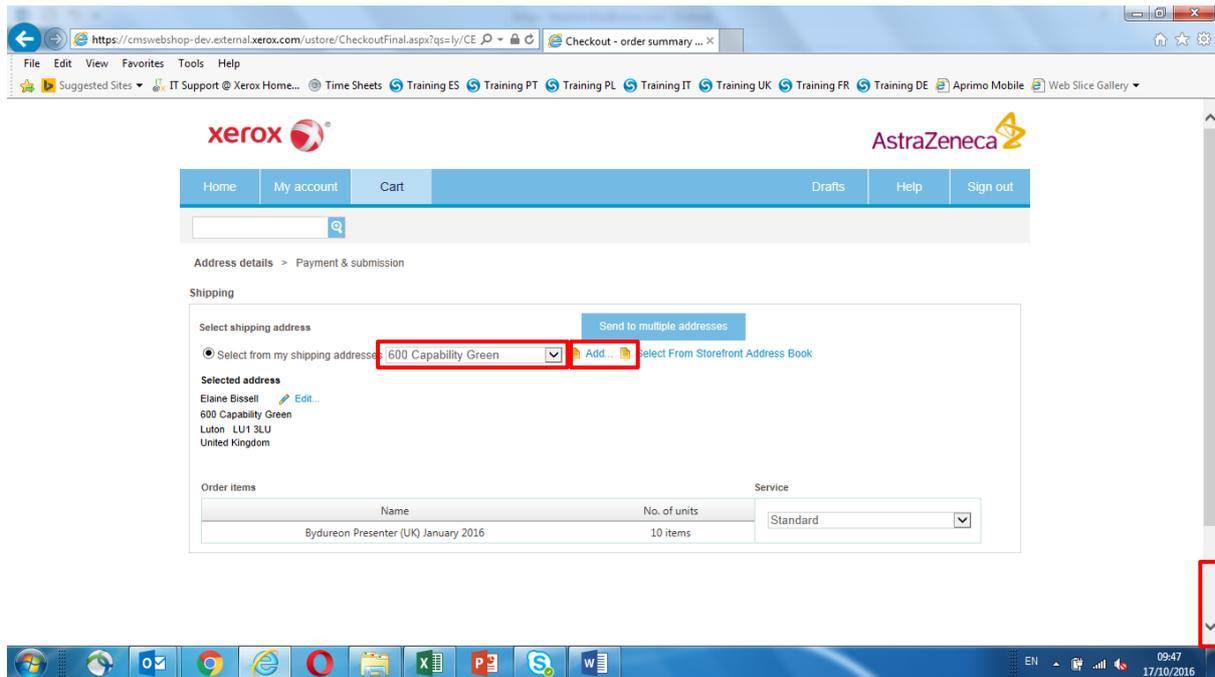
This request summary is just before **'Checkout'** and there is an opportunity to revise the information by clicking the **'Edit'** link and amending as required. Alternatively, if there is a requirement to add additional items to the order click **'Continue Shopping'** and repeat the previous steps...adding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

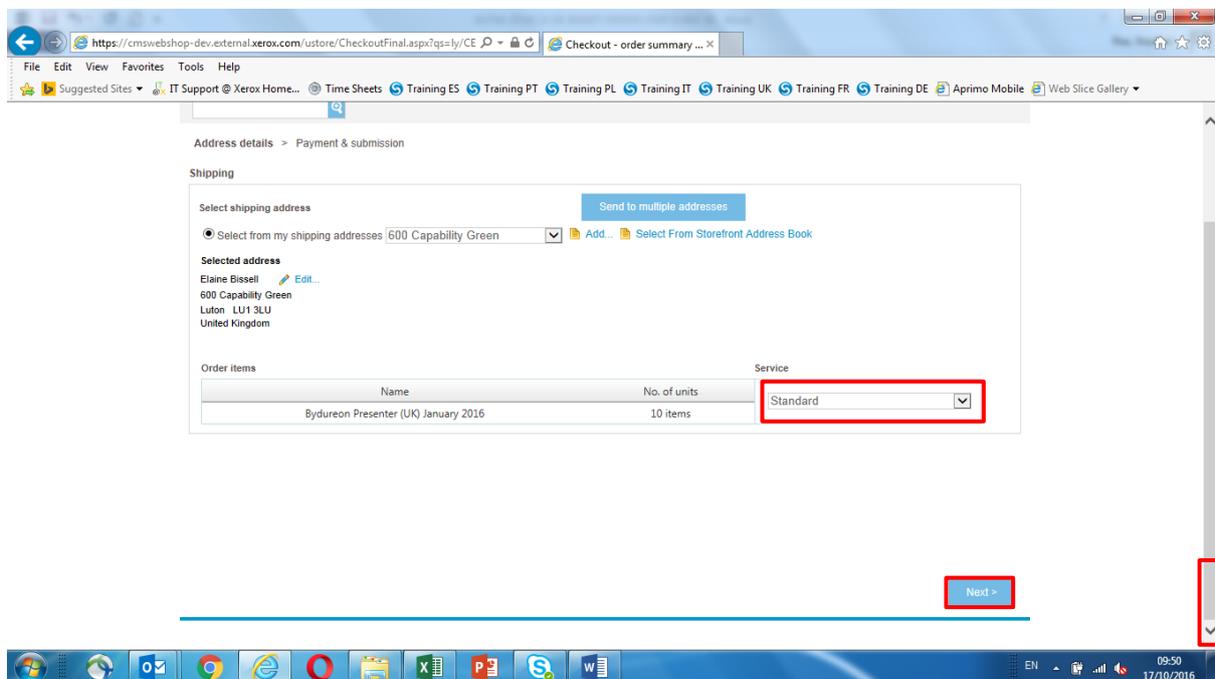


The **'Shipping/Delivery'** addresses can now be identified from the drop down lists. New addresses can easily be set up by clicking on the **'Add'** icon and filling in the appropriate fields.

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



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

Address details > Payment & submission

Ordered items

Name	Units	Price
Bydureon Presenter (UK) January 2016	Total: 10 items (1 item = 1 items)	-

Tax: £0.00 GBP
Total: -

If the order quantity of every item in this order is within the max grab quantity of the item for the calendar month, your order will be Auto Approved. Otherwise this order needs to be Approved.

[Back](#) [Checkout](#)

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

Your order has been received successfully.
Order number: 356421

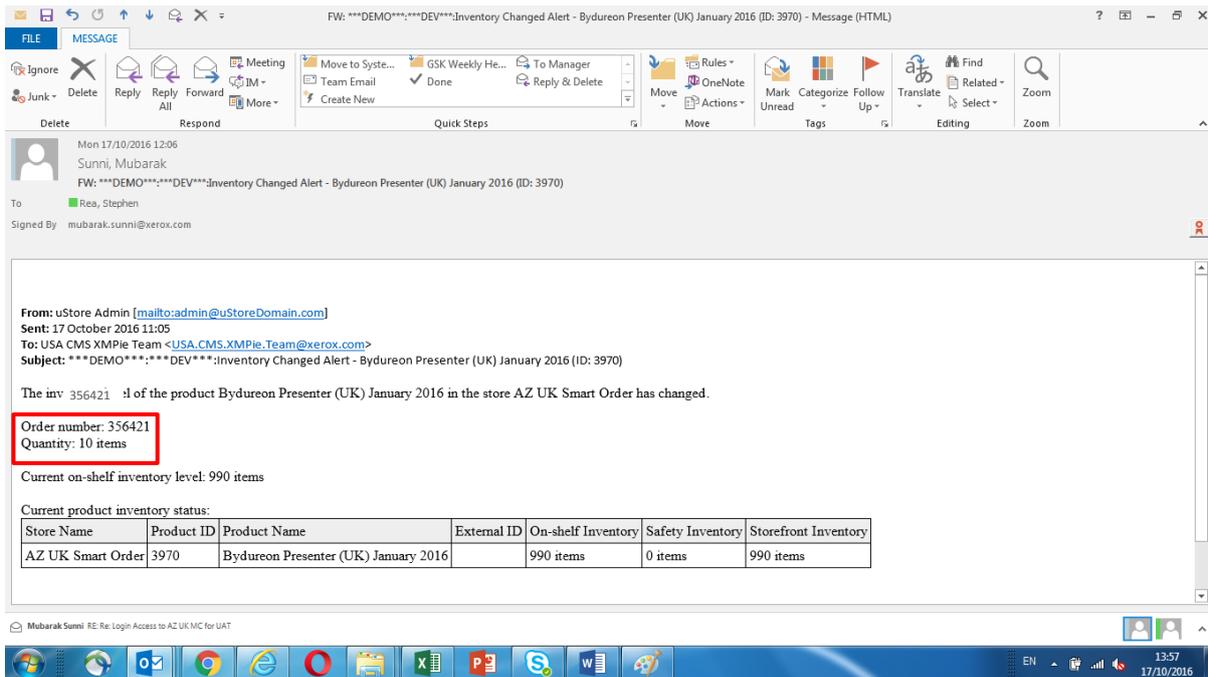
If the order quantity of every item in this order is within the max grab quantity of the item for the calendar month, your order will be Auto Approved. Otherwise this order needs to be Approved.

[Print order details](#) [Continue Shopping](#)

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

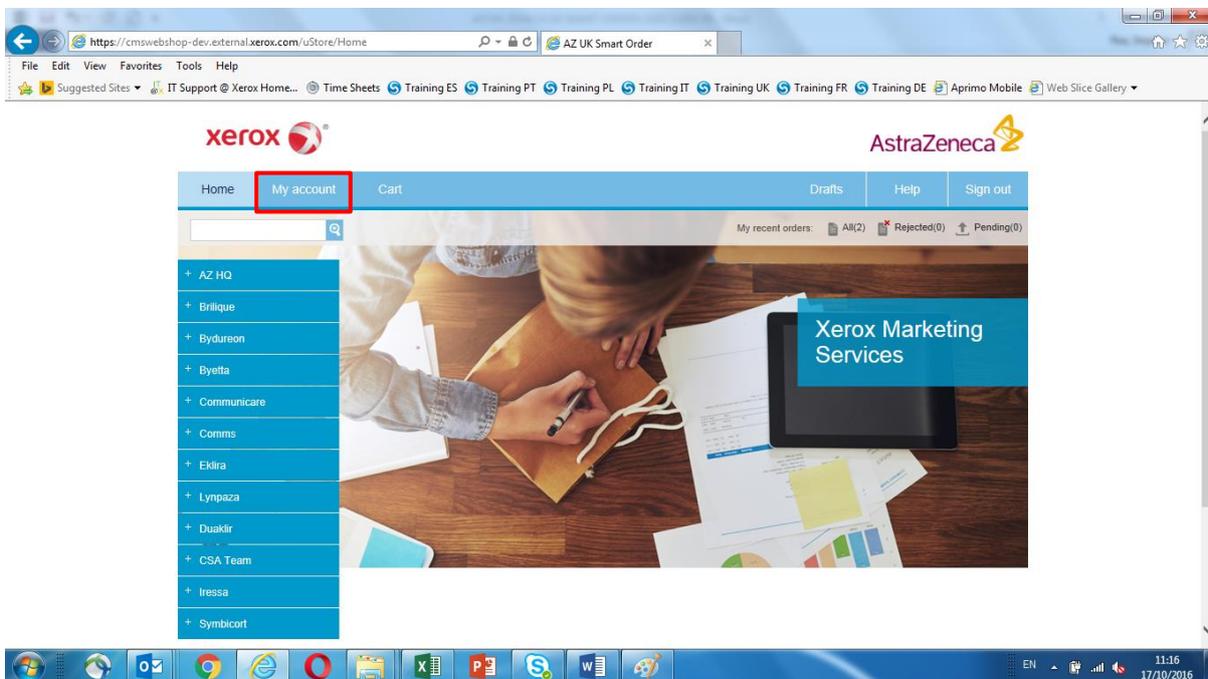
If there is a requirement to add a new request, then click **'Continue Shopping'**.

Request Confirmation



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

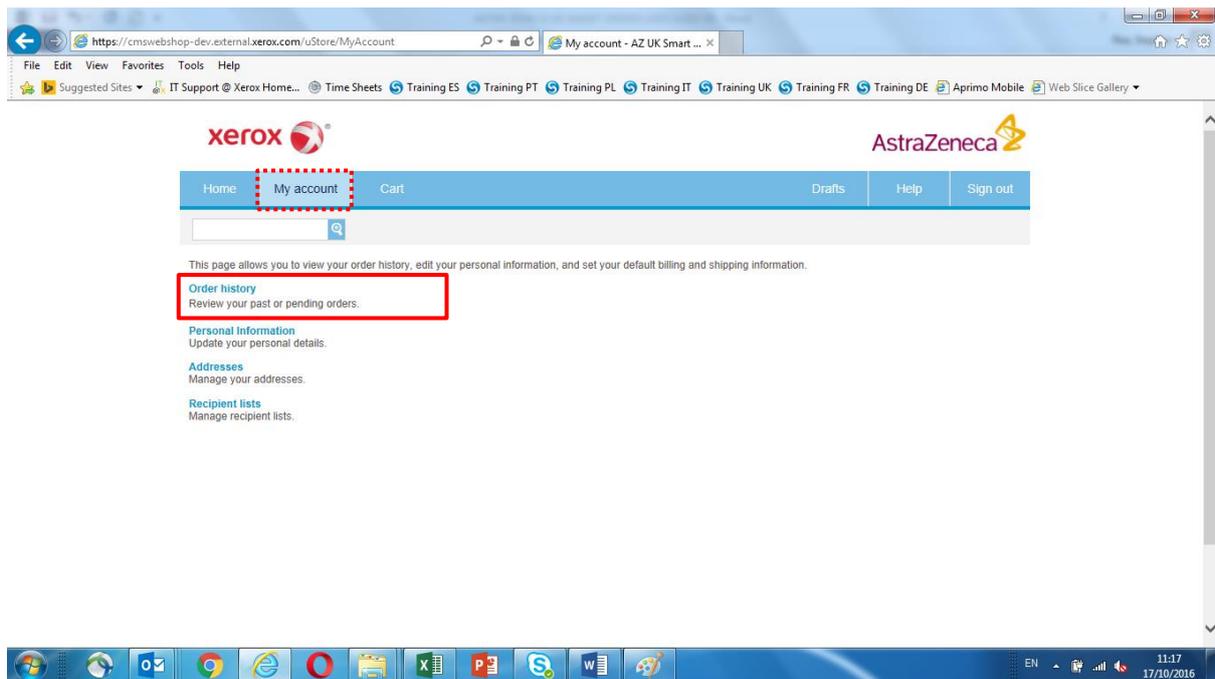
Request Status



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.

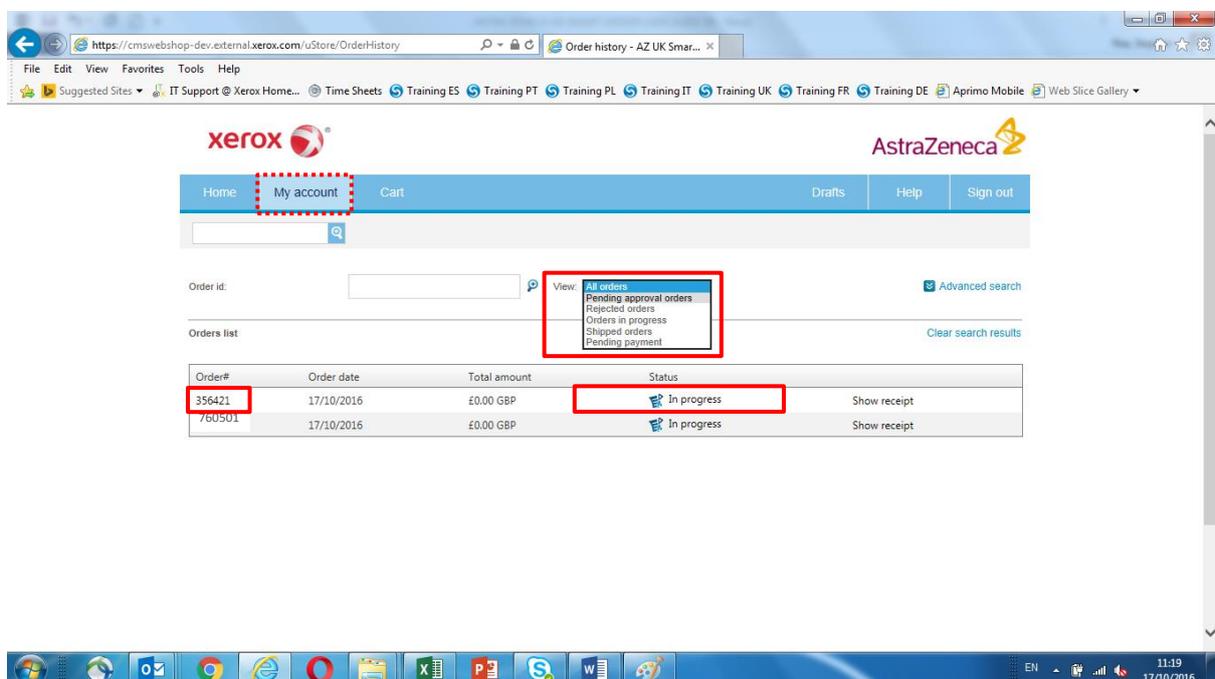
NB: This will allow access to the individual user's **'Order History'**.

Request Status



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

Request Status



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)

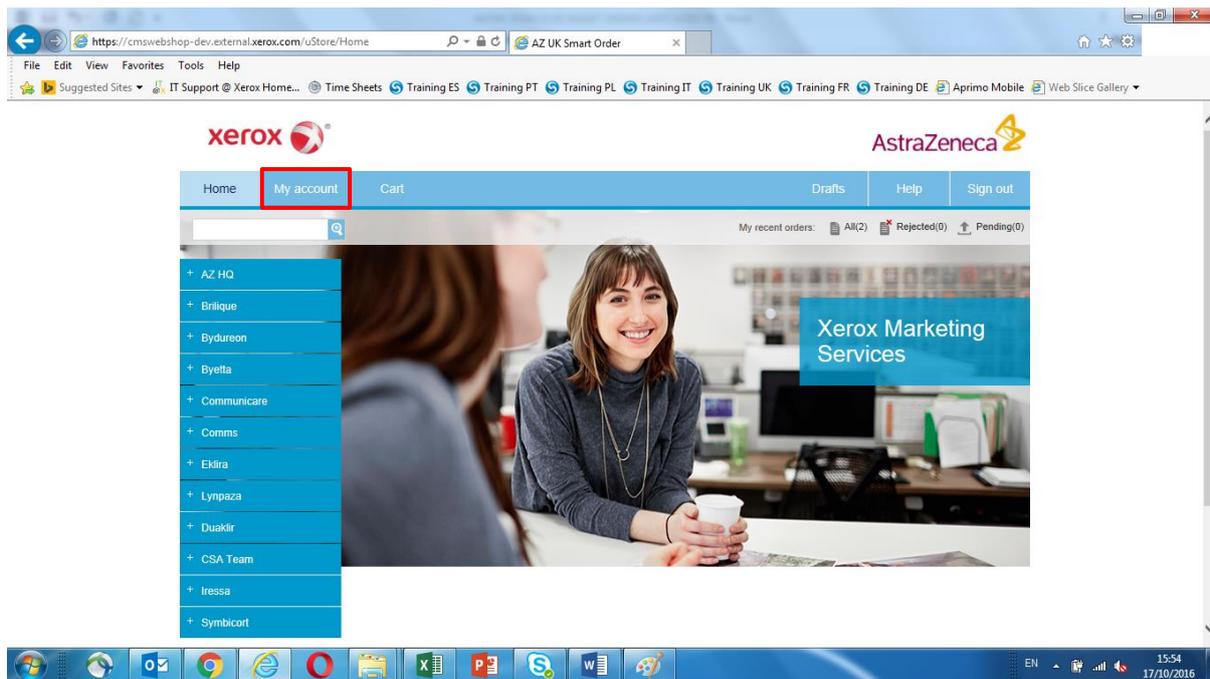
- + AZ HQ
- + Brillique
- + Bydureon
- + Byetta
- + Communicare
- + Comms
- + Eklira
- + Lynpaza
- + Duaklir
- + CSA Team
- + Iressa
- + Symbicort

Xerox Marketing Services

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

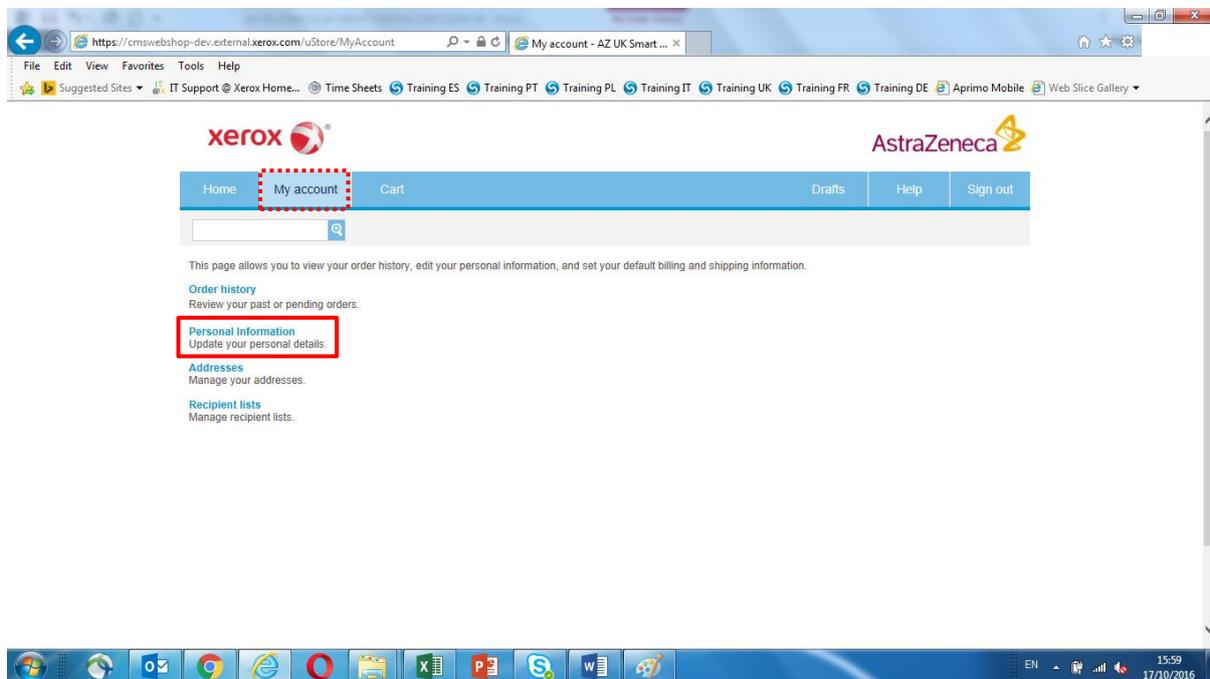
NB: Please refer to the **'Non Standard'** or **'Smart Meeting'** user guides for information on placing these types of request.

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

Personal Information

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.

AZ Smart Order FAQ's

1. What is the standard order lead time?

A - Orders submitted prior to 12.00 midday, will be packed and despatched for next working day delivery. Orders placed after 12.00 will be processed on the following day, with delivery the next working day after that.

2. Can I have a timed delivery?

A - The system provides the opportunity to select a pre-9 or Pre-12 next day delivery. This service will incur additional cost, and please note that orders must be placed before 12.00 to ensure next working day delivery.

3. Can I have deliveries always on a specific day of the week?

Yes, to assist field based employees who may work from home on a set day, the system allows you to select a delivery day. From the top menu bar, select '**My account**' then '**Personal information**'. The delivery day option is at the foot of the page, simply select the day by clicking the radio button and save.

4. What does the 'Maximum grab' qty mean?

The maximum grab is applied to some items to ensure stock is not depleted quickly by users ordering high volumes.

5. How does it work?

The maximum grab quantity is set for a rolling 30-day period, so if the max grab is 50, and you order 25 on the first day of the month, you will be able to order 25 more before the first day of the following month.

6. What if I need more than the max grab, for example a trade show or meeting?

If you require more than the max grab will permit, contact the Xerox account team on AZUKMCOders@xerox.com and they can support these requests

7. If an item is out of stock, can I still order it?

No. Xerox were asked to accept orders for items out of stock, which fall in to backorder. This process leads to multiple orders sitting on the system leading to confusion.

8. If an item is out of stock, how do I know when it is available again?

Where you see an item with no stock, you have the opportunity to click the '**Notify me**' button situated to the right hand side of the button. When the stock for the item is replenished, the system will notify you via email that the item is available for order

AZ Smart Order FAQ's continued...

9. I want to create an order over a period of time, can I do that?

Yes, you can add items to your 'saved items' folder, which allows you to check out later when convenient.

10. I have been side-tracked by a call, have I lost the items I added to the basket?

No. The system will add your order to a drafts folder. Click '**Drafts**' on the top **RH** of the home screen and press the '**Continue**' button to recommence where you left off.

11. Can I ship items to different addresses?

Yes. The system is configured to have your home address (for field users) and office address for HQ users, however you can add any other address at the checkout stage, for example if you wanted items to be shipped to an exhibition.

12. Can I split the delivery of an order to two places?

No. The system will allow a single delivery point per order.

13. I have placed my order, but it has not arrived, what do I do?

Send an email to AZUKMOrders@xerox.com who will investigate on your behalf.

14. What happens if I am out when my order is delivered, will the courier leave it out or with a neighbour?

The courier will need a signatory, and is not permitted to leave potentially sensitive materials with 3rd parties or outside a building.

Click here to return to the ['Contents Page'](#).