1. <u>Placing an order – this is done whilst you are in the client's</u> <u>record.</u>

When you are in the client's record there is a tab 'client orders,' click on this.

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You then have the option via tabs to, add delivery, add collection (if the client has equipment already), add visit.

A delivery is the issue of new equipment.

A collection is the collection back to the store of equipment in use.

A visit is a call by one of our drivers to adjust or troubleshoot a problem with existing provision.



In this case as the client has no equipment in use, add collection is not an available option

Select add delivery.



The following screen appears, click in the extra options field.

This opens the stock catalogue search fields.

Type here to



If you know the item code for the equipment you need enter it in the 'code' field, if not use the drop down for 'category.' Items are categorised according to type of equipment. For example, mobility aids.

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	Working with client: TEST, TEST, [II:S0004] You can use this screen to sing for items located at South Soften Store (SSF7DH) (S Ant: You can use the * wildcard in the code and description fields below to search for items e.g. *	bath*
-	Search	
Desc	Sect: By harn Code	Wide Gearch:
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Modular Ramps		
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PCT Children's		
Profiling Beds		
Sensory Mobility		
Single Handed Care V Slide Sht M/H Belts		

Remember the more fields you fill in the more restricted your search becomes, for example if you selected mobility and then used a description *bed* in the description field, there would be nothing that satisfies these two requirements.

If your search results in a list of items, then the list may extend to more than one page. There are arrows at the bottom of the screen to move from page to page.

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Here the search is for mobility aids.

You will note that some items, here the H005A have a small '?' next to the code. This is called a tool tip, providing further information about ordering this equipment.

Clicking on the item code will open another window giving more detail about the equipment including user weight restrictions or links to suppliers' websites.

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P F			Click thumbnail to vi	ew.			
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	HERDALT	T	Description: W/Frame7343 W22*xH34*-3	" Single Use: no	32	U KOWIENS	Add to Basket
			Long Desc:				
			Min Weight: 0	Min Height: 0			
			Max Weight: 160	Max Height: 0			
		_	Training Required: no	Default Loan Period: N/A			
/ \ \ \			Fitting Required: no	Special Order: no			
	<u>KD01</u>	w	Details		24	0 Reviews	1 Add to Basket
1 1 1		_	Two-Man Derivery: no	Siots Required: 1			
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			Serial Nos: [Available] [Refurb]				
	<u>K002</u>	w	Life Expectancy: 24 months	Available From Supplier: yes	25	0 Reviews	1 Add to Basket
1 11			Owned By Store: yes				
			Item Value: 15.21				
			Catalogue Information:				
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Type here to search	÷ • 0	2 🔁 🔁	<u>×8 </u>			R ⁴ /	Q

To order the equipment select 'add to basket' on the right hand side. When there is no stock of an item, alternatives may be suggested by the system. You can still order an item even though stock is not available, it will go to a waiting list, stock is being replenished constantly and when th item is in stock your order will be processed.

Once you have placed the item(s) you need into the shopping basket select 'Checkout' at the top of the screen.

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Client Orders View Basket Add Items					
		Working with client: TEST, TEST. [1150004]			
		You can view and amend the contents of your backet by using the View Backet link If you wish to add items to your backet use the Add Items link.			
		Check Out			
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This brings you to the details of your referral.

Click on the link 'date of decision to provide' to open a calendar to select the appropriate date.

'Client type' and 'delivery options' are drop down mandatory fields.

When complete, press continue.

The following screen appears

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Client Orders Add Items			
		Working with client: TEST, TEST, [TES0004]	
	Use1	his screen to go through and confirm all the orders you wish to place. Only those orders that have been confirmed will be created.	
item	ОК	B007A: SURE FOOT BATH BOARD	
8007A: SURE FOOT BATH BOARD	×	Oty Recoilered: 1 (Austable 42)	
H002: Standard Perching Stool Adjustable Height	×	Priority:* Within 7 Days 🛩	
		Short Term: 0 Weeks Clear	
		Exchange:	
		Req For Discharge:*	
		Discharge, Date:	
		Notes:	
		Y	
		Confirm Order	

Move down the list of equipment confirming the required detail (on the right) for each item ordered. Notes here are about the equipment itself for example 'set to its highest setting.' These notes are not seen until the day of delivery and should not be used for messages about the delivery journey.

Remember to get the order priority right, urgent deliveries are 48hour priority, others are 7 day. Please only use 48-hour priority where the urgency relates to the client's needs.

Required for discharge relates to hospital discharge, not discharge from your caseload.

As you complete the detail on the right-hand side the red X will change to a green tick after you have pressed confirm. Confirm each item in turn.

When all ticks are green press continue.