

# Customer Checklist For Ease Of Ordering

## Online Ordering

- Save orders if you will be leaving your computer for more than 10 minutes.
- Log out of your account when you have finished placing your order.
- Regularly review and update the Trust Administrators, User Maintenance / Authoriser roles.
- Consider reviewing products on your Standing Orders / Favourite lists on a regular basis.
- Consider reviewing your Masked products and Financial Coding.
- Review the Unsatisfied Requisition (Req) Lines report as soon as possible to understand unsatisfied demand or product information.
- We recommend not to use a saved favourite directly to the Online Ordering page as this may cause caching issues. Saved favourite to our NHS Supply Chain main website is the best approach.
- Always ensure you have a Trust and Req point selected on your account before searching the catalogue or placing an order.

## eDC

- Regularly update your Materials Management Database (MMD) and Stock / Local catalogues on the PDAs.
- Local Catalogue - If you maintain local lists (for example Excel spreadsheets) these should be maintained regularly.
- Review non stock interfaces and ensure that planned changes are notified to NHS Supply Chain in due course.
- Ensure PDAs are on charge if not being used.
- Review on a regular basis the configuration of Requirements and Req points.

## EDI

- Regularly review order standards or methods to ensure the most up to date standards are being used. This would be XML / PEPPOL at the moment.
- Ensure orders are sent to NHS Supply Chain before 4pm.
- Be fully aware of whom in the trust receives either the TX (Order Acknowledgement) reports and / or status 200 messages with order updates.
- Review third party systems to **ensure all data is present and up to date** (such as Delivery Location, Req Points, Depots, Financial Coding).

## Catalogue Management Third Party

- Customers not using catalogue providers who receive our catalogue either via a direct URL or FTP should be updating their systems every day.
- **Make sure (be confident) your catalogue providers are updating the catalogues every day**, the customers and / or providers should then make any changes to their systems as appropriate.

## Customer Reports

- There are a number of useful customer reports available to the NHS. Some of which are available online and others need to be requested via Customer Services.
- TR reports and suspended lines reports are available online.
- Unsatisfied lines, transaction errors and discontinued lines reports are available via Customer Services.