Welcome to Ordering!

This Getting Started Guide will help you begin using your new access to Ordering. We'll get you logged in to the system and started in the right direction creating orders by looking up items. We'll also look quickly into Credit Returns and Templates. And, finally, we'll take a look at what to do when you're done with the system for the day, in order to log out.

Logging In

The first step for any user is to start your Internet browser, navigate to the website and log in. This login ensures that your data is secure, and only authorized personnel are viewing and/or updating your information.

1. Open your Internet browser of choice (Netscape Navigator 6.2+, Internet Explorer 5.0+). Depending on your system setup, you may be able to double-click the browser icon on your desktop, or use the Start menu to open the browser.

2. In the Address/Location box type: supply.mckesson.com and press the ENTER key on your keyboard. The login page displays, a part of which is shown to the right in Fig. 1. Note that the address may change slightly, but most importantly, the 'http' is followed by an 's', indicating a secure site.

3. Click in the User ID box and type the ID that was given to you when you registered. Many User IDs begin with 'ac' and have other letters and numbers after that, like this: acxxxxx where the x's are replaced with your personal digits or characters. Other User IDs will begin with two characters that are indicative of the customer name.

   IMPORTANT: DO NOT PRESS THE ENTER KEY ON THE KEYBOARD, YET, AS THIS WILL ATTEMPT TO COMPLETE THE LOGIN, AS IF YOU HAD CLICKED THE ENTER> BUTTON.||

If you ever forget your password, type your User ID and click the Forgot Your Password? link to have your password sent to your e-mail address of record.

4. Press the TAB key on the keyboard, or click in the Password box.

5. Type in the Password given when you registered. As you type, the password will NOT display, but *** (asterisks/stars) display in the Password box to ensure the security of your password.
6. Click the **ENTER** button or press the **ENTER** key on your keyboard. Note that the password disappears for security. The Home page displays. All the modules for which you are registered are available via the links at the top of the page.

### Starting Ordering

Once you've logged in, you can navigate from any page to any module for which you've signed up. You can also maintain your User settings from the Home page. This allows you to change your e-mail address, and your login password. You would click the **My Account** command in the toolbar to access your user settings. Now, we'll get into the Ordering module.

Click the tab, directly below the top banner graphic. The *Open ORDERS* list displays. Note that the Home and Ordering tabs (and other module tabs, if you have registered for them) remain throughout your session. This allows you to quickly navigate to any of your modules quickly and easily, by clicking the appropriate tab. Also note that the banner contains **Logout** and **Contact Us** buttons that are accessible at any time. More on logging out later.

### Creating Orders

Once Ordering has been started and the *ORDERS* page displays, you have access to all your ordering functions. You can view orders of any status from the *ORDERS* page by selecting the desired order status in the *ORDERS* list box. Notice that the *Ordering* tab is now highlighted, indicating that it is the current module. This remains so long as you are performing any ordering function. You can always return to this page by clicking the *Ordering* tab.

![Fig. 2](image.png)

Directly below the tabs is the **Ordering toolbar**, a line of menu buttons and command buttons that give you access to all your Ordering functions. Menu buttons (indicated by the down-arrow beside the button name) contain menus of related commands, like the *ORDERS* menu button, for instance. When you click one of these buttons, a menu drops down, allowing you to select one of the commands.

To start a new order (new Credit Returns and Templates are similar processes) see the steps to follow on the next page.
1. Click the **ORDERS** menu button. The **ORDERS** menu displays.

2. Point to the **Create Order** command. The **Create Order** pop-up menu displays.

3. Click the **Manual** command. The **CREATE ORDER** page displays, part of which is shown in Fig. 3.

4. If you have more than one Account for which you order, you can pick the account for which you're creating the current order from the **Account** drop-down list. This allows you to create an order for any account, and item and pricing information will be specific to that account. You can specify only one Account per order.

5. You then type in the order identifier into the **PO#** box. This can be up to twelve (12) alpha-numeric characters (letters, numbers or dashes). If you so choose, you can use the same PO# for several (or all) your orders. Ordering automatically adds a Sequence Number (two-digit number) to all PO#, beginning with 00, and incrementing by one each time you use the same PO# for a new order. For instance, if you have a purchase order number you use for all your McKesson orders, you can use that number every time you create an order, and Ordering automatically adds the **Sequence Number**, to uniquely identify each new order.

6. Click the **GO** button. The order is created and you can add items using **CATALOG SEARCH**, **QUICK ADD**, and **ITEM IMPORT**. **CATALOG SEARCH** allows you to look up and select items to add to the order using a variety of different search criteria. With **QUICK ADD** you can quickly add items if you know the McKesson Item #, NDC, or UPC. **ITEM IMPORT** allows you to quickly type in or import (from a text file) a large number of items for which you know the McKesson Item #, NDC, or UPC.

7. The next boxes, shown in Fig. 3 below, allow you to begin searching for items.

8. You can also use the **Strength** and **Form** boxes to further limit the search results. Type the appropriate **Strength** (such as 300MG) and/or **Form** (such as TAB) into the box to
lookup items that match the By and For criteria, and the specified Strength or Form.

9. Once you have set the Account #, PO#, By and For (and optionally the Strength and Form) criteria, you click the GO button to create the order and begin looking up items by the criteria you specified. The SEARCH RESULTS page then displays your item lookup results and the initial order summary.

10. You add an item to an order from the SEARCH RESULTS, by entering a value (number) in the Quantity box and clicking the ADD TO ORDER button at the bottom of the page. If you wish to add more than one item from the currently displayed list, type a value in the Quantity box for each item you wish to add, then click the ADD TO ORDER button.

11. As you add items, the ORDER DETAILS (items you've added to the order) display below the lookup criteria fields. This allows you to view the order as you are building it and more easily maintain the items on the order (you can add more items, change the quantity for any item, or delete any items, for instance). As you add items to an order, it is automatically saved, unless you make changes on the ORDER DETAILS page. If you make any changes to items in the ORDER DETAILS, be sure to click the SAVE button below the list of items.

Once you begin an order, you have more entry methods for adding items to the order. In addition to the CATALOG SEARCH, which you began from the CREATE ORDER page and can also initiate from the ORDER DETAILS, you can also add items using the QUICK ADD (quickly add items if you know the McK Item #, NDC or UPC) feature, or the ITEM IMPORT feature, which allows you to quickly add numerous items by their McK Item #, NDC or UPC, or by importing an item list (items identified by McK Item #, NDC, or UPC), which may have been generated by a third party pharmacy system. Note also that you can import a complete order from a file, from the CREATE ORDER page.

When you're finished adding items to your order, you can submit the order for processing, or you can prepare the order before submitting it. The PO Prepare process checks through the items on the order to ensure that you are getting the best-priced items, based on criteria you set. You can check items for Contract Compliance, best prices and even for minimum or rebate quantities, as well as other options. If you simply wish to create an order and submit it later, that's fine also. You can prepare an order and submit it any time after it has been created. It is highly recommended that you prepare each order prior to
submitting it, to be sure you’re getting the best items possible on the order.

You can view orders you’ve created by clicking the ORDERS menu button in the toolbar and selecting **List Orders -> <status>**.

From there, you can view orders of various status:

**Open, Pending, Submitted, Acknowledged, Invoiced, Received, and Archived.**

Fig. 6 to the right outlines the progression of orders through the stages. The table below defines each stage:

<table>
<thead>
<tr>
<th>Stage</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Orders you are in the midst of creating, but have not sent to McKesson for fulfillment.</td>
</tr>
<tr>
<td>Pending</td>
<td>Orders you’ve submitted to someone in your own institution, who needs to approve them prior to McKesson filling the order. This status only exists if your institution has requested this feature.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Orders immediately after you have Submitted them to McKesson, but before our inventory systems have confirmed that the inventory was successfully allocated to your order. Since we acknowledge and confirm orders almost instantly, orders are in this state very briefly. However, an order may display in the Submitted state until the ORDERS list page is refreshed, either by you manually refreshing the page, or by an action that causes the ORDER list page to redisplay (such as going to another page and then coming back to the ORDERS list).</td>
</tr>
<tr>
<td>Acknowledged</td>
<td>Acknowledged orders have been confirmed by McKesson. Acknowledgment information shows which items and quantities were actually allocated to your order. If you or your organization has requested automatic substitutions, they'll display on the Acknowledged order. Any quantity variances are shown as well, in the event of allocation issues or insufficient inventory for any item on your order. The Discrep? column displays an icon there is an issue.</td>
</tr>
<tr>
<td>Invoiced</td>
<td>Invoiced orders have been fulfilled and shipped. This shows the final shipped quantity and the calculated invoice price.</td>
</tr>
<tr>
<td>Received</td>
<td>Received orders are those that have been received via McKesson’s Closed Loop Distribution (CLD) device. This device can be used to bar-code receive individual line items or entire totes, and Supply Management Online can be used to view that receipt information online.</td>
</tr>
<tr>
<td>Archived</td>
<td>After 7-10 days, orders are archived out of the Ordering component of Supply Management Online. All orders will be visible in the Reports component and History displays, but are no longer shown in the active list of orders; this keeps the active list more focused on your current order activity.</td>
</tr>
</tbody>
</table>
CSOS Ordering

In order to use CSOS Ordering, you must go through the DEA CSOS enrollment process. More information can be found either on the DEA's site, www.DEAecom.gov/, or on the "Resources" page. Once you’ve been accepted and the DEA has given you the necessary digital certificates and other required information, you can place Schedule II controlled substances orders electronically in SMO without a paper form DEA-222. When you’re ready to set up your computer for CSOS Ordering, go to the “HELP” menu within SMO and click on “CSOS Setup and Ordering” for a guide. There’s more about HELP later in this document.

If you are not yet on the CSOS program, you can still fill out a DEA-222 form and give it to your McKesson delivery driver. DEA-222 forms can be obtained from the DEA Division Field Office nearest you. For a national directory of the office locations, go to: www.deadiversion.usdoj.gov/offices_n_dirs/fielddiv/

Credit Returns

The Credit Return feature of Ordering allows you to create and submit Credit Returns to McKesson. You can create a Credit Return for items you’ve ordered and view previous credits you’ve submitted. Creating a new Credit Return is similar to creating an order. You add items by Catalog Search and Quick Add. The main difference is that you must supply additional information for a Credit Return.

1. Start a new credit return by clicking the RETURNS menu button in the toolbar and selecting Create Return from the RETURNS menu that displays. The CREATE RETURN page displays, allowing you to enter a CR# (up to 4 digits) and to begin looking up items to add to the Credit Return. You can use the same lookup criteria as when creating an order (see Steps 4 through 9 in the previous section).

2. Once you’ve added an item to a return, you must supply the Return Reason, the reason for your return of the item.

![Table](Fig. 7)

You choose from the drop-down list in the Return Reason column for each item on the Credit Return. There are several reasons to choose from, including 'Unsalable - overstock', Salable - item received in error', and others. For certain reasons, you must include the Return Invoice # and the Return Invoice Date. These values refer to the original invoice and invoice date for when the item was purchased. If you select one of these reasons, when you save the return, the Error column displays a flag icon, until you have entered the Invoice # and Date for the item in error and saved the return. If you know the information, you can type it in the appropriate box; if you don't, you can click the Search Invoice button in the Invoice column to look through the invoices for that item.

3. When you've selected the Return Reason, and typed in the Return Invoice # and Return Invoice Date, you should click the SAVE button to save the changes to the item.

4. If you're done adding items to the return, you can print and/or submit the invoice for processing by clicking the PRINT and SUBMIT CREDIT RETURNS buttons, respectively. You can view all your Credit Returns by clicking the RETURNS menu button in the toolbar.

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and selecting **List Returns - > <status>**. This displays your returns in their various states: Open, Submitted, and Finalized.

**Templates**

Templates are lists of items you order often, also called 'standing orders'. You can enter items onto a template one time and then you simply create an order from the template whenever you need to order those items. For instance, if you enter the same items onto an order each month or quarter, you could create a template containing those items and use it each time to create the new order, instead of having to recreate the order every time.

You create a new template in much the same way as you create an order, by adding items. But you can also make a template from an existing order. If you have an order that contains many items you wish to place on a standing order, you can simply open the order and save it as a template. Then you can make any adjustments necessary to the items in the template (adding more items, deleting items, and changing quantities). Each time you copy the template into an order, the items and quantities will be transferred directly from the template.

**Item Catalog**

The main function of the Catalog is to look up items and inquire on the stock status or item information (Catalog Search). Additionally, you may be able to Quick Order items you've looked up, if the item is available. To look up items:

1. Click the **CATALOG** button in the Ordering toolbar. The **Catalog Search** form displays.
2. If you have more than one account for which you can look up items, you can pick the specific account from the **Account** drop-down list. This allows you to look up items for different accounts, as item information (pricing, specifically) may be different for each account.
3. You can look up items using many different data fields: McKesson Item #, NDC, UPC, Description, and other specific fields, or by All search fields. Select the search **By** method and type lookup criteria in the **For** box. For instance, you can select the **Description** search method and type **ZANTAC** in the **For** box to look up all the Zantac items in your item catalog.
4. You can also use the **Strength** and **Form** boxes to further limit the search results. You would type the appropriate **Strength** (such as 300MG) and/or **Form** (such as TAB) into the box to look up items that match the **By** and **For** criteria, and the specified **Strength** or **Form**.
5. Once you have set the **Account #**, **By** and **For** (and optionally the **Strength** and **Form**) criteria, you click the **GO** button to display items meeting the criteria you specified.

The **SEARCH RESULTS** page displays your item lookup results.

See Fig. 8 on the next page for a screenshot of CATALOG: SEARCH RESULTS.
6. If you wish to check the inventory stock status (the amount on hand at your Distribution Center) for any item in the SEARCH RESULTS list, click and type a value in the Quantity box and click the CHECK INVENTORY button at the bottom of the page. The Inventory Results column displays the stock status graphically with an icon (for sufficient quantity available, or a for insufficient quantity available), while the Available column displays the quantity available (up to 100 - displays '>100' if you requested status on more than 100). You can check stock status on more than one item on a single page by typing values in the Quantity box for more than one item. You CANNOT check the stock status for items on different SEARCH RESULTS pages at the same time. After checking the stock status, you can lookup other items and check their stock status, or you can Quick Order any item you've looked up.

7. To Quick Order any item(s), type the amount you wish to order for the item(s) in the Quantity box(es) and click the QUICK ORDER button. If you wish to order more than one item from a single lookup page, type in order quantities for any item you wish to order from that page. When you click the QUICK ORDER button, any items on the page that have a value in the Quantity box are placed on an order. The order is given a PO# beginning with 'QO-' and ending with the date stamp (Month, Date, and Year), such as 'QO-08282002'. The Order Results column (which was the Inventory Results column) changes color and indicates the status of the order graphically with an icon (for successful order, or a for not ordered), while the Available column displays the quantity ordered (up to 100 - similar to the Stock Status check).

See information regarding online Help & Tutorials and logging out on the next page.
Help and Tutorials

Each module within the system contains a link to the online HELP and TUTORIAL files.

The help files are documentation that explain the use of all the features in the various modules and take the place of printed documentation. To access the Help files for any module, click the HELP button in the toolbar (line of buttons directly below the main tabs). The HELP button is typically on the far right side of the toolbar. You can navigate to various sections of the Help files by clicking the links on the left side of the Help window.

There is also a link to an online tutorial, which can be used to train new users in the many operations within Ordering and Catalog. The tutorial leads the user through step-by-step instructions for creating, preparing, and submitting orders, credit returns, and other features in Ordering. To launch the tutorial, click the TUTORIAL button in the toolbar (line of commands directly below the tabs). The TUTORIAL button is the last command on the right side of the toolbar. Once started, you can navigate to any section or page of the tutorial using the TOPICS drop-down list.

Logging Out

Whenever you have completed a session, you should log out to maintain the security of the system. If you leave the system idle for an extended period of time (typically more than 30 minutes), the system will automatically log you off. If you return and try to perform a function that requires access to the server, you are taken to the login page and must re-login to gain access again. For privacy and security, you should always log out if you are stepping away from your system for any amount of time. Once you’re logged out, no one can access the data you’ve viewed because of the system’s built-in security features.

To manually log out from any page, click the Logout command in the top banner. You are returned to the Login page and notified that you have been logged out. If you wish to re-enter, simply type in your User ID and Password and click the ENTER> button.