

# User Guide

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#### **Overview**

This document contains instructions on how to use the CH2 Direct order processing website.

CH2 Direct is A simple and intuitive web-based customer ordering system – CH2 Direct® lets you easily manage your ordering, providing direct access to our extensive product range.

The following customers are able to use CH2 direct:

- New cash customers who pay be credit card are able to create an account online and receive an email confirming their login details.
- Existing commercial accounts can enable their account by providing the account number, contact name, email address and password.
- The customer's login ID is the account number or email address. A parent can login and place orders on behalf of multiple child accounts.
- The password, email address and contact name can be updated by the customer.
   Instructions for doing so follow later in this document.

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#### **Create a New Cash Account**

Firstly select 'Create a New Cash Account" as circled in the screen shot below.



- The below screen will then be displayed
- The fields marked with are required fields and must contain data. The contact name is not required but is used to
  mark emails to the attention of this person.
- Complete all required fields and click Submit.
- An email containing the account number and login details will be sent within a few minutes. You can then login and place an order.

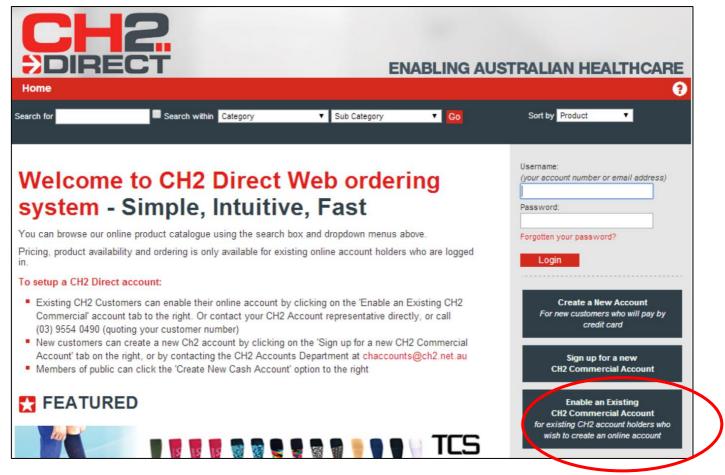


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#### **Enable an Existing Commercial Account**

Customers who currently have a commercial account with CH2 can create a CH2 Direct login and place orders online.

Select 'Enable an Existing CH2 Commercial Account' as per the screen shot below



- The below screen will then pop up.
- Fill in all fields then click submit, please note the password must be at least 6 characters and contain at least one numeric.
- An email containing your login details will be sent within a few minutes, you can then login and place orders.



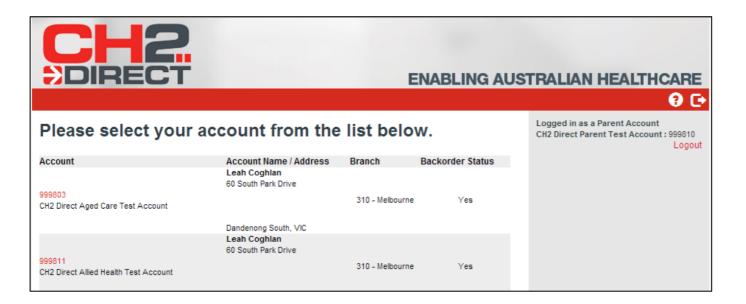
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#### **Logging into CH2 Direct**

To log onto CH2 direct simply type in <a href="http://direct.ch2.net.au/">http://direct.ch2.net.au/</a> into your web browser and Enter your customer number or email address in the Username Fields circled below Enter your password and click Login.

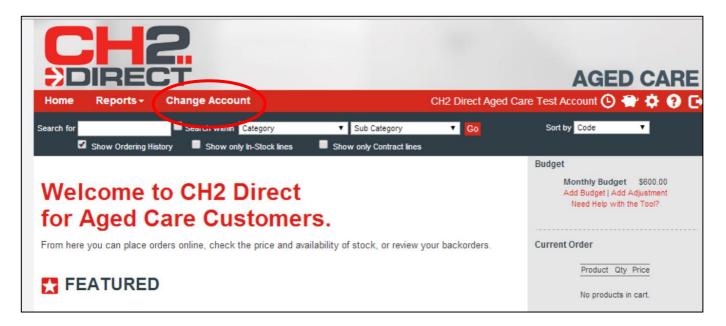


- When logged in as a parent account, all child accounts are listed for your selection as per the below screen shot. Only when a child account has been selected, can you perform searches and place orders.
- When logged in as a single account, this page will not be displayed.



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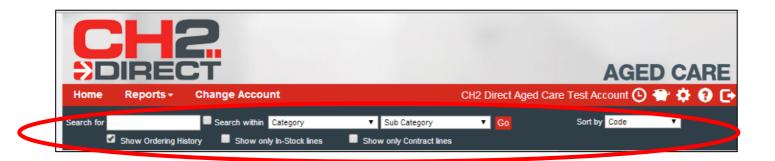
When logged in as a parent account, the child account can be changed by clicking "Change account" as per the below screen shot.



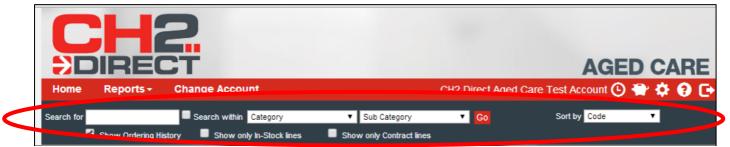
## **Searching for Products**

Products can be found using the following methods:

- Choose a category from the drop down list, click Go
- Choose a category and a sub category from the drop down lists, click Go
- Use a keyword, click Go
- To use a Keywords in conjunction with category and sub category, select, Search within, click Go
- Keywords can be part of a description and do not require wildcards Inclusive search -When searching for supplier part number of 08-888, 08-888NP products will be found.
- Plural search So that glove finds gloves and vice versa
- Logical and "nitrile gloves" will return a result where both words appear somewhere together in any searched field.



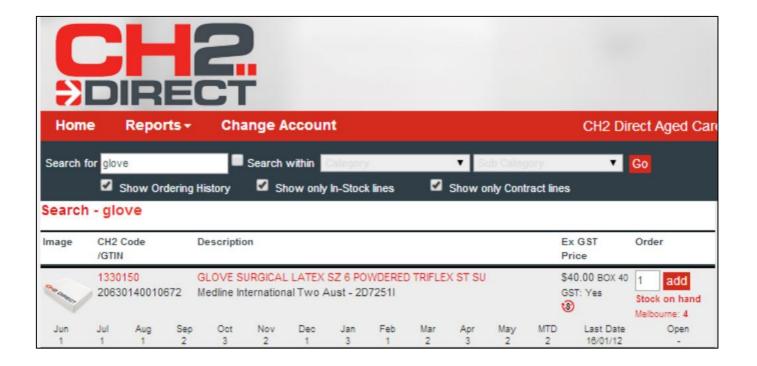
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Check boxes allow you to display:

- Order History
- Only in Stock Lines
- Only Contract lines

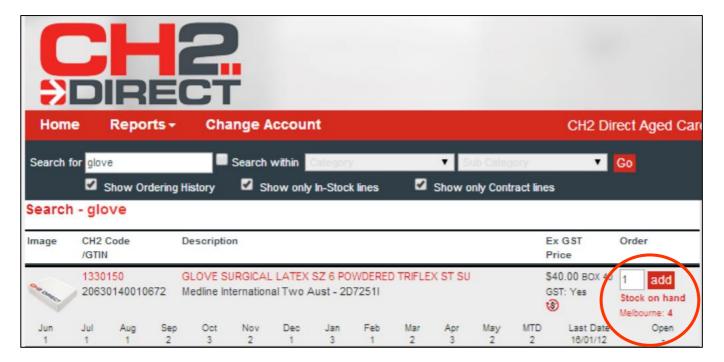
The example below shows all three check boxes checked.



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## **Quantity Available**

The quantity available and status of: 'Available', 'On Order' or 'Non Stock Line' are displayed against each product. The quantity available is updated every 5 minutes.



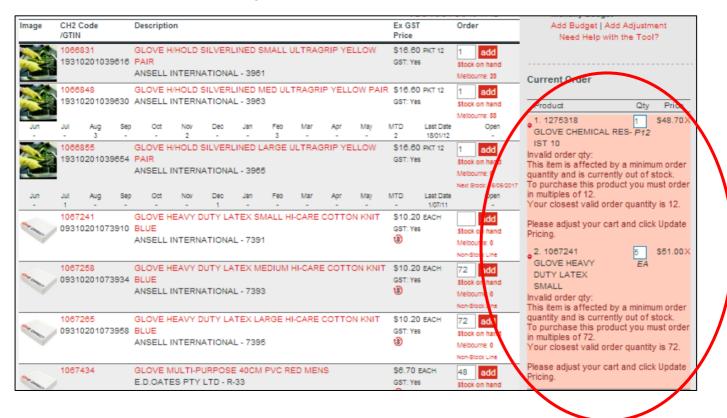
#### **Minimum Quantities**

If a product has a minimum order quantity set, the default quantity shown here will reflect that quantity. The default quantity will also take into account any remnants currently in stock. An order can be placed for a quantity up to the available quantity and then in multiples of the minimum quantity.



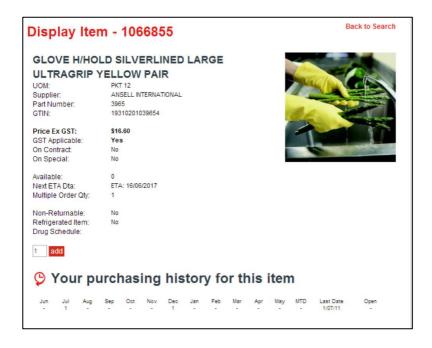
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When an incorrect quantity is added to the cart and an error message is displayed, explaining what the correct quantity should be as per screen shot below. This must be corrected before proceeding.



#### **Product Details**

Click on the product description in the search screen to display the full details for a product. This includes s image (if available), your purchasing history, and related and alternative products. Items can be added to the cart from this screen or you can choose to 'Back to Search'.



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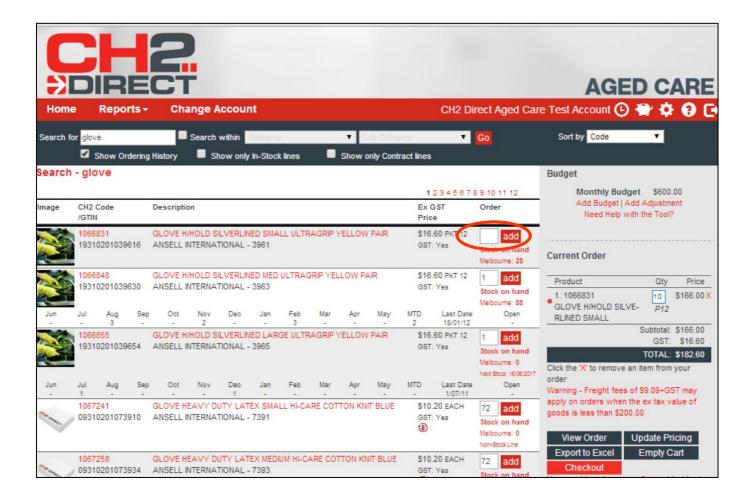
## Placing an Order

Once the required product has been located, change the quantity if necessary and click the **Add** button next to that product. The product will appear in a list under '**Current Order**'.

Continue adding products and when finished, click 'Checkout

Note:

Products can be deleted from the 'Current Order' by clicking on the cross to the right of the product or click **Empty Cart** to delete all items from the cart.



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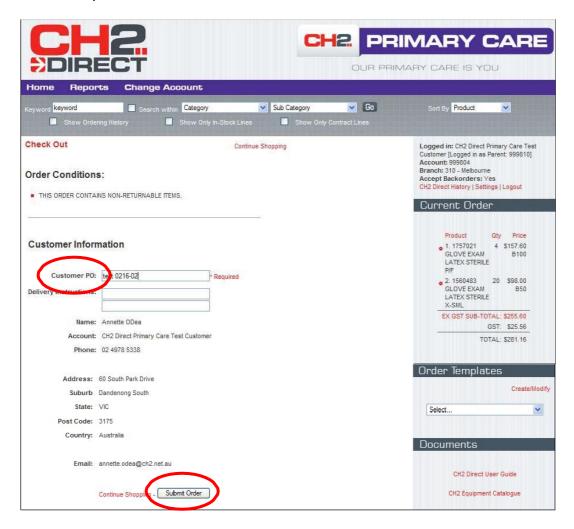
#### **Checkout Screen – Commercial Account**

The order confirmation screen is displayed, showing the customer and order information.

Enter the Customer PO (Purchase Order) field, this is a mandatory field, but if you don't use PO numbers, may be a date, or name of the ordering person (or anything else that assists both you and CH2 to identify the order).

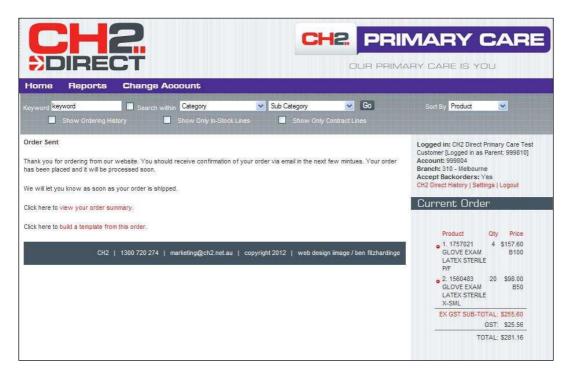
Enter Delivery Instructions if required. This can be up to 28

characters per line. Click Submit Order



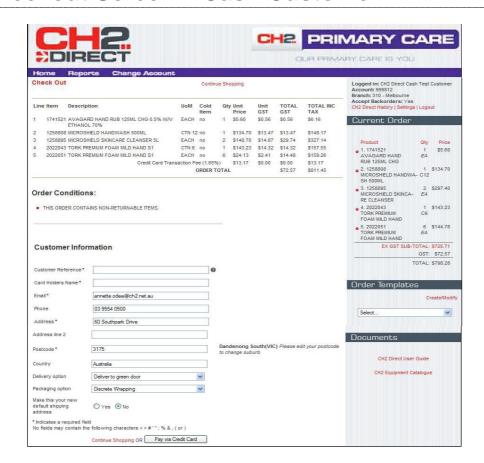
A confirmation email will be sent to the customer. It will contain details of exactly what products are available for delivery. When a parent is placing an order on behalf of a child account, the confirmation email will be sent to both the parent and child unless the email addresses are the same.

After submitting an order, a summary of your order can be printed



Select the 'Home" button to return to the start

#### Checkout Screen - Cash Customer



A summary of the products purchased and any additional charges such as freight and merchant fee are displayed at the top of the screen.

Complete the customer reference (this can be anything up to 25 characters that identifies

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your order) and the Card Holders Name; click 'Pay via Credit Card.

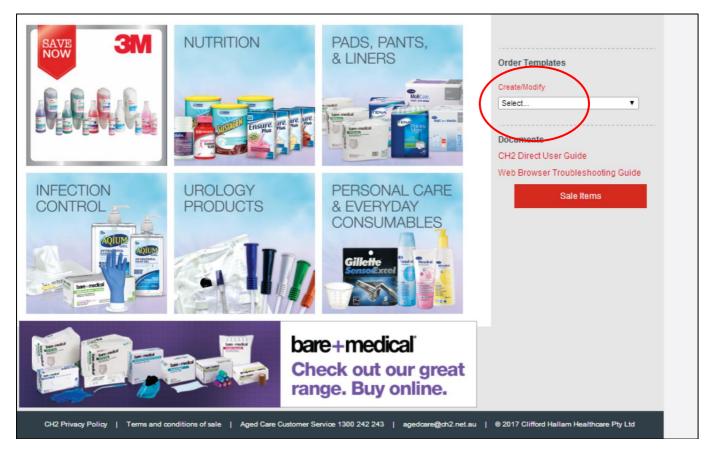


Enter your credit card details on the St George payments page and click 'Submit Payment'.

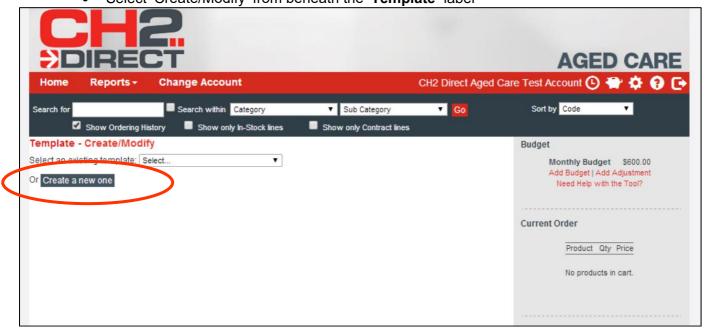
A receipt will be emailed to the customer and displayed on the screen where it can be printed.

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## **Creating a New Order Template**



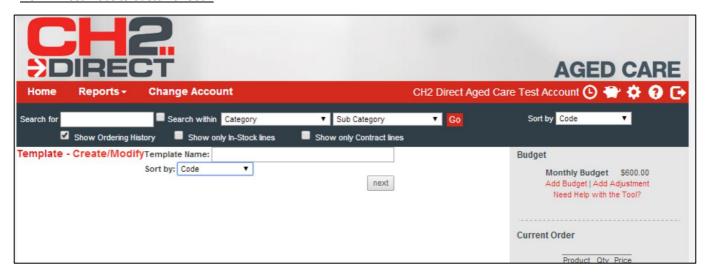
• Select 'Create/Modify' from beneath the' Template' label



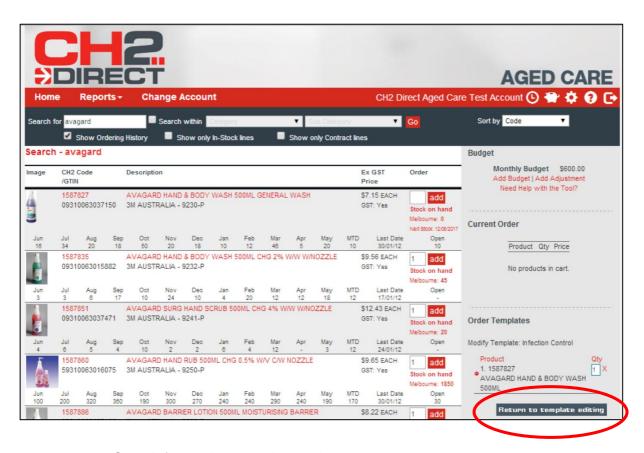
Select 'Create a new one'

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#### **CH2 Direct Website Customer User**



- Type a meaningful name in the Template Name field
- Select a sort sequence from the drop down list if required and click Next



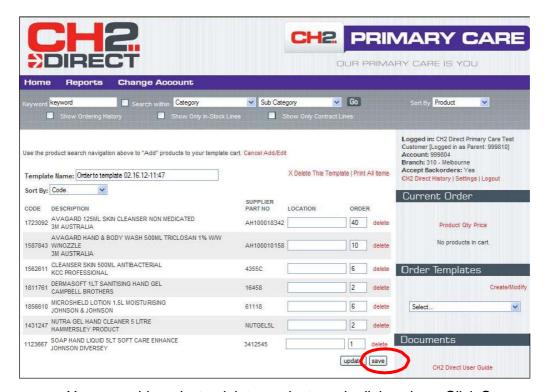
- Search for products as shown above
- Ament the quantity if require and click add.
- Once all products have been added, click return to template editing then click save

## **Creating a Template from an Order**

 After an order has been submitted, the order contents can be used to create a template.



Select 'Build a Template from this Order'

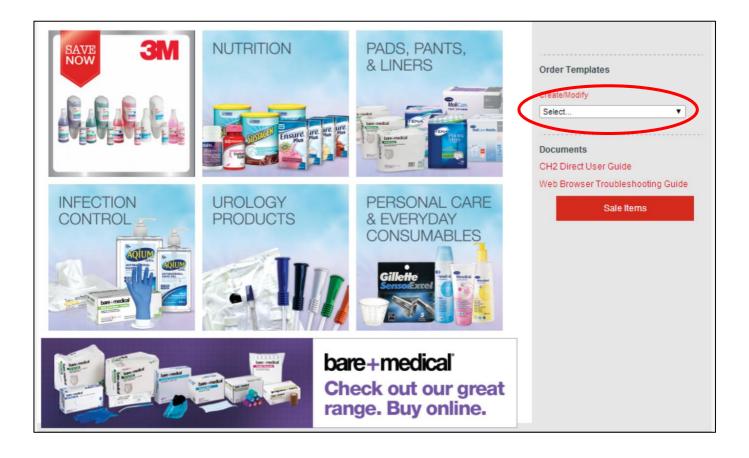


You can add products, delete products and edit locations. Click Save

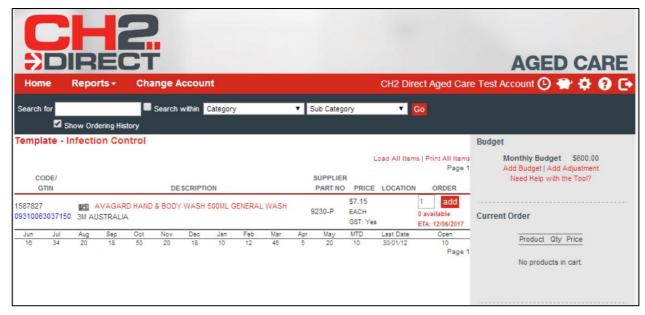
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## Using a Template to Place an Order

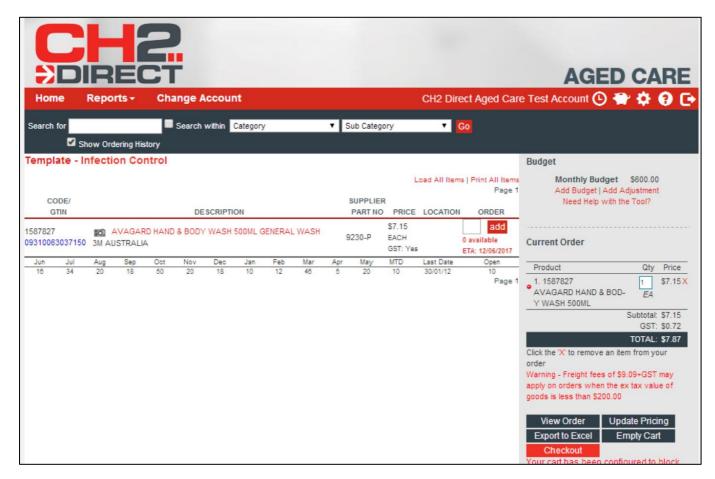
Select a template from the drop down list.



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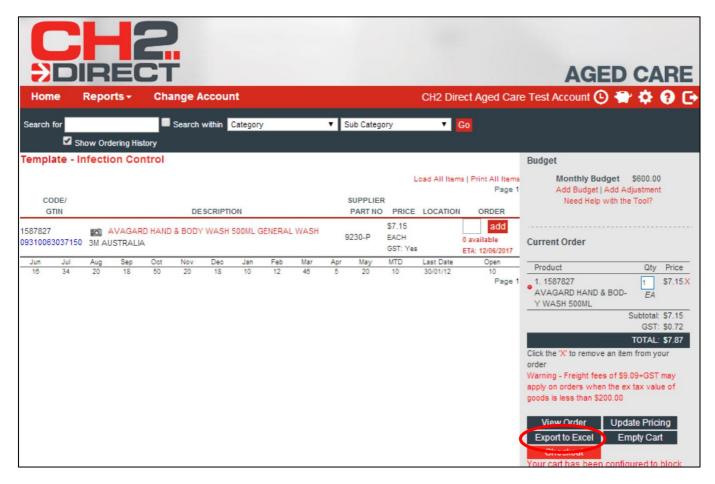
- The template details are then displayed. Alter the quantity if required
- Click 'add' against the required products or select the option to "Load All Items"; these will be added under 'Current Order'



When all products have been added to the order, click 'Checkout'

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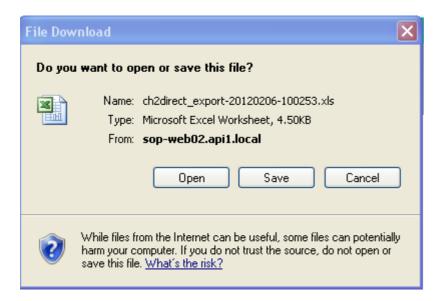
## **Export a Template to Excel**



Select your order template, then click the button to the bottom right of the page "Export to Excel"

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#### Click Export to MS Excel



Click Open or Save and name the file



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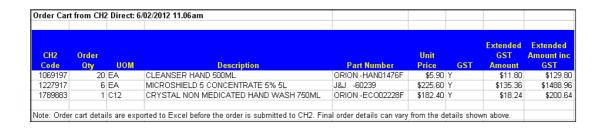
### **Export an Order to Excel**



To export the current order to Excel, select the Export to Excel button



Select Open or Save and name the file



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#### Reports

There are 3 separate reports such as a back order report, open orders report and item history report available under the report section on CH2 direct.



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#### **Open Orders Report**

Track the progress of your orders. This is a list of all your open orders with CH2, recently placed orders may take up to an hour to appear on this report.

The Open Orders Report is displayed on screen and can be printed or exported to Excel.

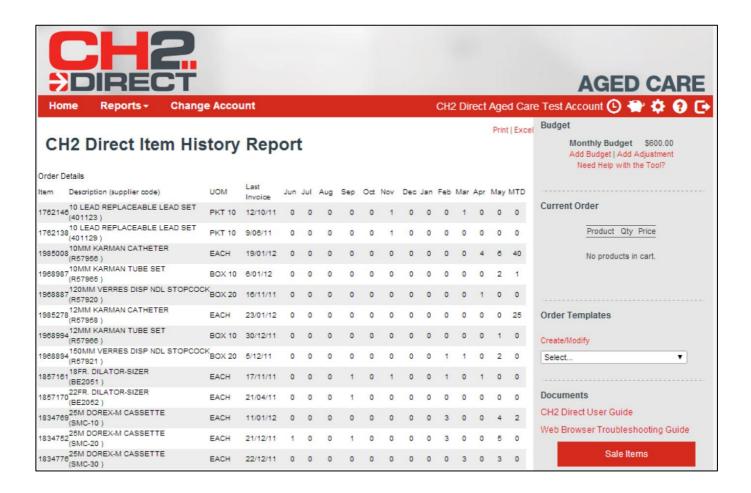


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#### **Item History Report**

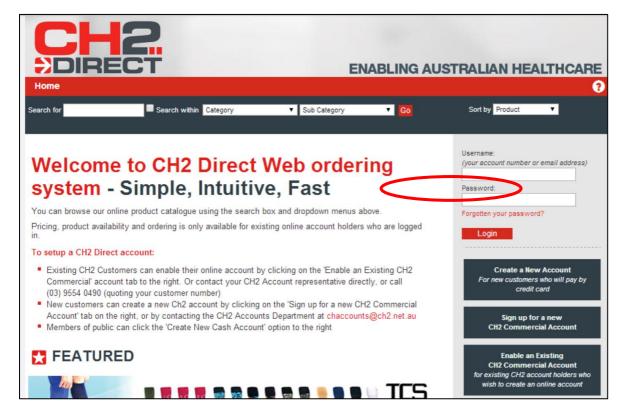
A full list of all items you have purchased through CH2 in the last 12 months, with month by month purchase quantities. Your last invoice date and supplier part number are also included. The 'View' option will only display usage for the last six months where the print and excel options have the full twelve months available.

If this report is large, or where sorting, searching or filter is required, then an export to Excel should be the option of choice.



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## **Retrieving a Forgotten Password**



From the Home page, click on 'Forgotten your password?'



- Enter your account number or email address and click email my password
- Note: Your email address can only be used if it is unique to one account.
- An email will be sent immediately.

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