How to Guide on Ordering and Contract Ranking for MMCAP

Product Management
Cardinal Health
**For Help Contact
Enterprise IT at:
1-800-326-6457, Opt. 2,
Opt. 1**

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Assumptions

- You will be using cardinal.com applications shortly or immediately after this training

- You have a cardinal.com user ID and password

  * If you need user ID, please call Cardinal Health customer service at 1-800-926-3161

Agenda and Objectives

- Agenda:
- Prepare to Use Ordering
- Build An Order
- Analyze and Send an Order
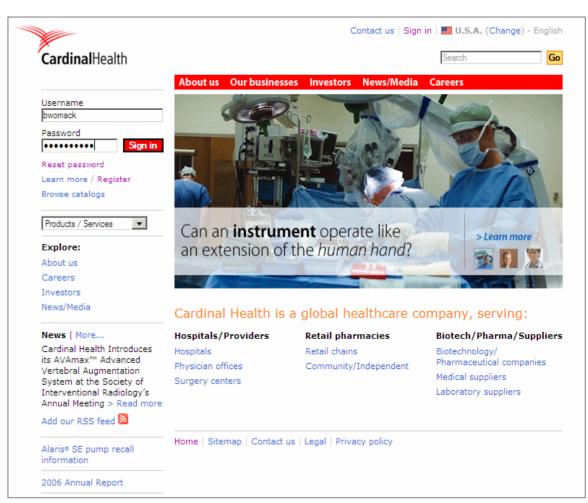- Create a Request for Credit

Learning Objectives:

- Understand the three settings that will optimize the ordering experience
- Understand how to build an order
- Understand how to analyze and send an order
- Understand how to create a request for credit

Prepare to Use Ordering

Logging into cardinal.com ordering

- Point your browser to:

- *www.cardinal.com*

- Enter your user id and password
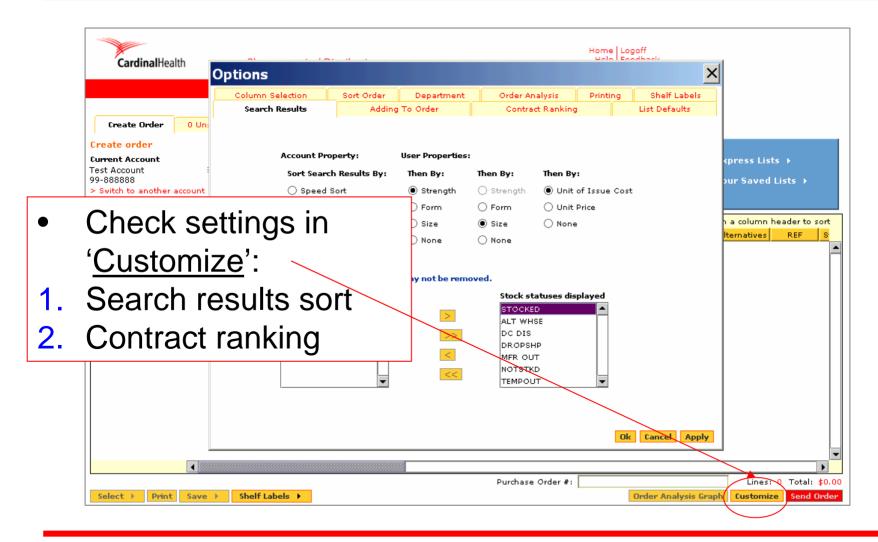
- Press enter or click 'Sign in'

Accessing Ordering

- From the red navigation bar:

    – Click on 'Orders' and 'Place Orders'

- When you click on 'Place Orders' for the first time, you will be prompted to download the Java applet. This will take a few minutes based on your Internet speed.
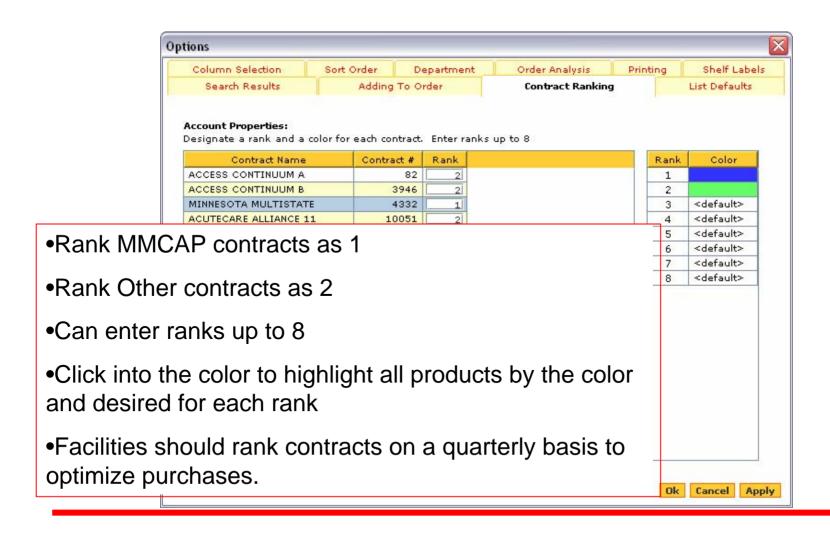
Settings for Success

- Check settings in 'Customize':
1. Search results sort
2. Contract ranking

1. Set Search Results Sort

- Contract Ranking – bubbles MMCAP contracts to the top of the search results list
- Additional Sorts – within each contract group, sort by strength, then size within strength and finally by unit of issue cost (each unit)
- Goal – quickly find products that will yield rebates or other purchasing benefits
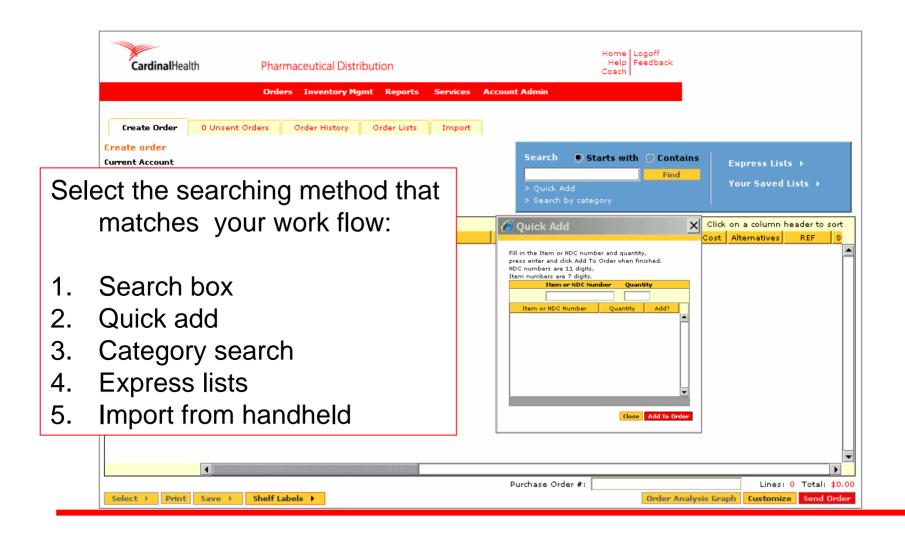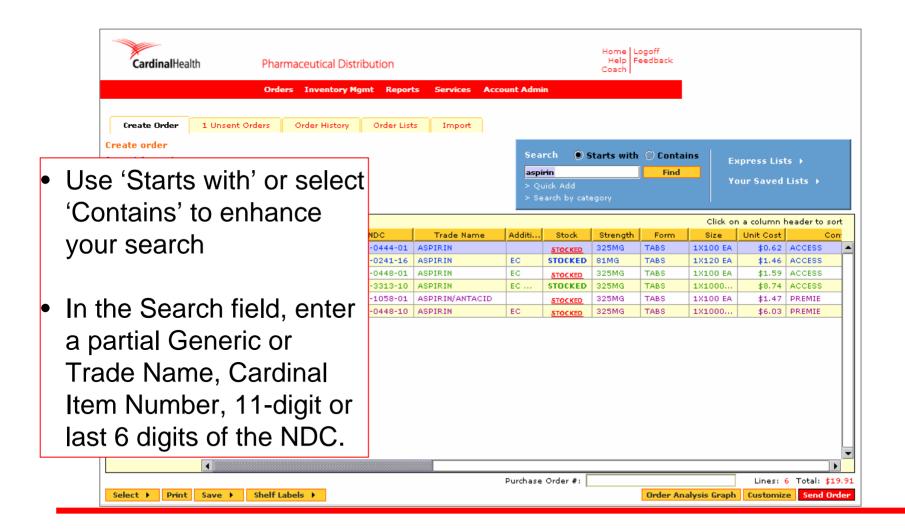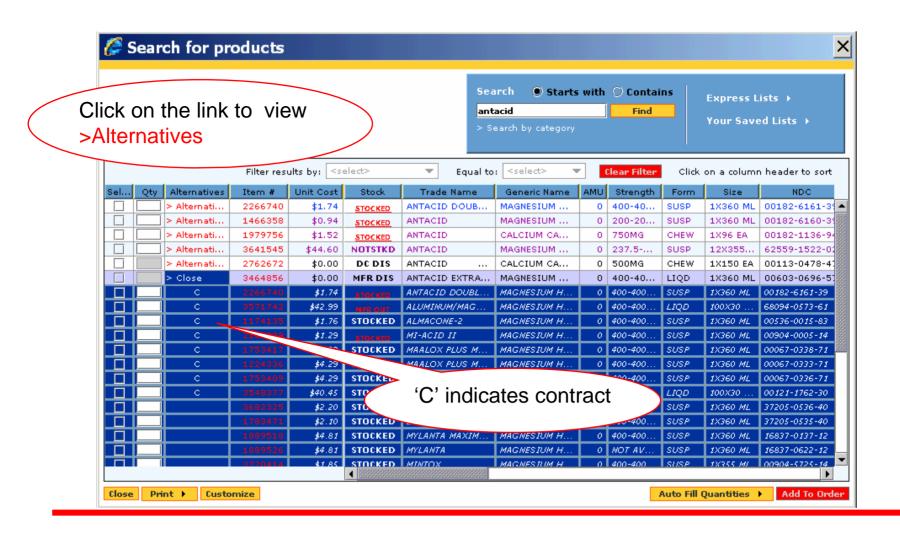
2. Set Contract Ranking

Options

| Column Selection | Sort Order | Department | Order Analysis | Printing | Shelf Labels |
| Search Results | | Adding To Order | | **Contract Ranking** | List Defaults |

Account Properties:
Designate a rank and a color for each contract. Enter ranks up to 8

Contract Name	Contract #	Rank		Rank	Color
ACCESS CONTINUUM A	82	2		1	
ACCESS CONTINUUM B	3946	2		2	
MINNESOTA MULTISTATE	4332	1		3	<default>
ACUTECARE ALLIANCE 11	10051	2		4	<default>
				5	<default>
				6	<default>
				7	<default>
				8	<default>

- Rank MMCAP contracts as 1

- Rank Other contracts as 2

- Can enter ranks up to 8

- Click into the color to highlight all products by the color and desired for each rank

- Facilities should rank contracts on a quarterly basis to optimize purchases.

Ok   Cancel   Apply

Build An Order

Search Methods in Ordering

Select the searching method that matches your work flow:

1. Search box
2. Quick add
3. Category search
4. Express lists
5. Import from handheld

Product Search Field

- Use 'Starts with' or select 'Contains' to enhance your search

- In the Search field, enter a partial Generic or Trade Name, Cardinal Item Number, 11-digit or last 6 digits of the NDC.

Find Alternatives

Narrow Your Search Results

Sending an Order

Check Price and Availability

If you build your order throughout the day before sending, you can click on:

> **Update Price & Availability**

to review any changes in price or availability for products on your order. This allows you to ensure your order has the most current data before sending to Cardinal.

Confirm and Send Your Order

- When Order Analysis is complete:
- Enter a Purchase Order number
- Click on "Confirm Send"
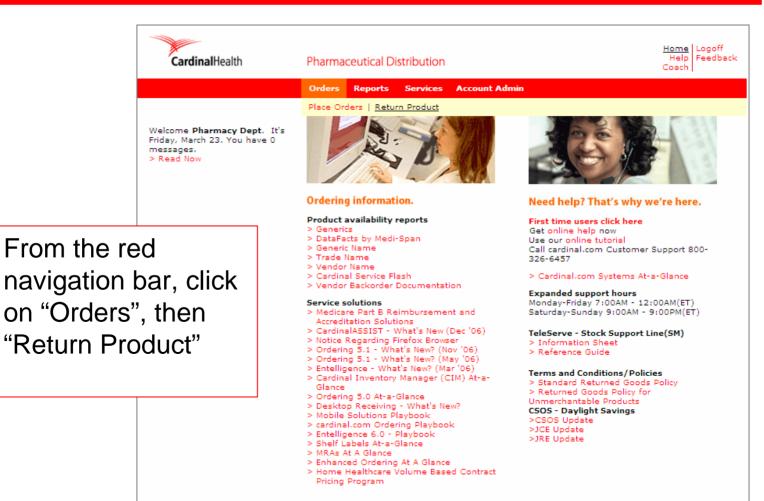- The Order Confirmation will appear on your screen in a few seconds
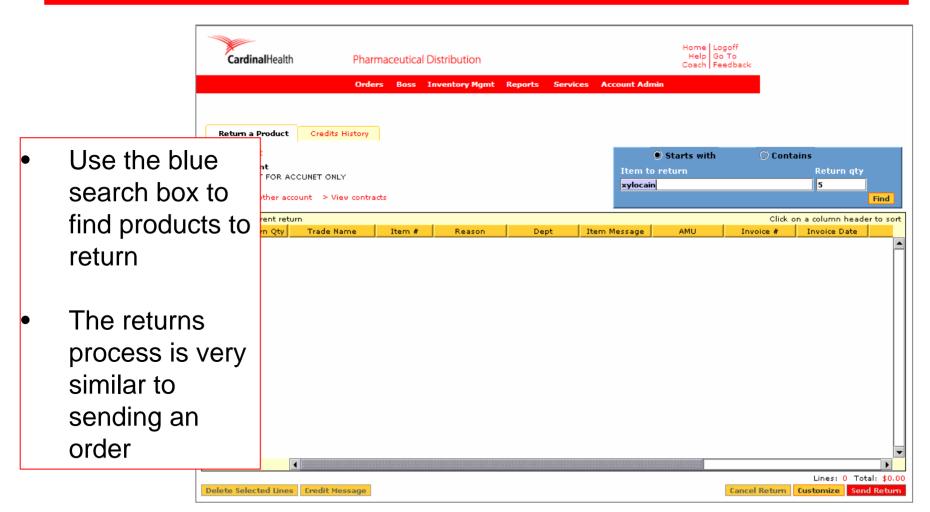
- Create a Request for Credit

Steps to return a product to Cardinal

- Determine if the product is merchantable
- Create a Credit Request using cardinal.com
- You will receive an Merchandise Return Authorization
- Print 1-3 copies of the Return Authorization (currently defaults to 2)
- Sign a copy of Return Authorization
- Send Return Authorization and tote containing product to Cardinal via driver
  - Follow return policy instructions for refrigerated or other products that require specific handling
- At the DC, the Credit Department will process the return and create a credit invoice.
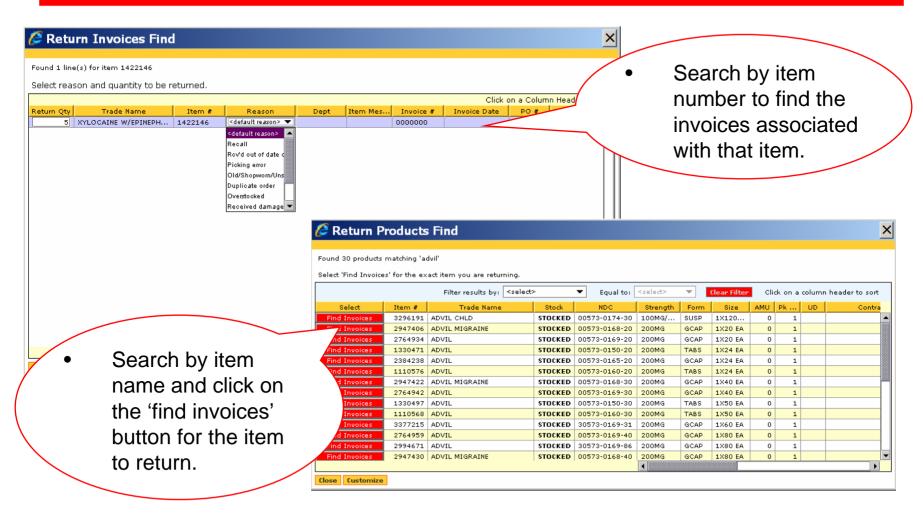- Your electronic (MRA) Merchandise Return Authorization will become the credit invoice.
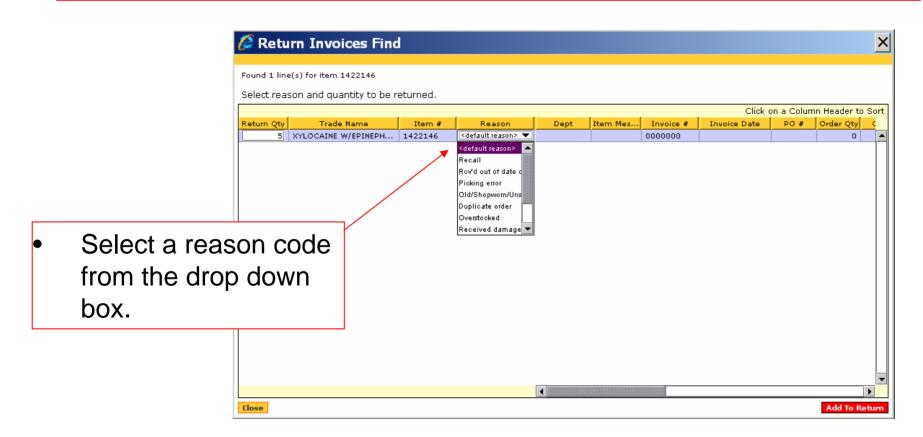
Selecting the Returns Module

- From the red navigation bar, click on "Orders", then "Return Product"

Build a Credit Request

- Use the blue search box to find products to return

- The returns process is very similar to sending an order

Search by Item Number or Name

- Search by item number to find the invoices associated with that item.

- Search by item name and click on the 'find invoices' button for the item to return.

Select a Reason Code

- Select a reason code from the drop down box.

Sending a Credit Request

1. Click on **Send Return**
2. Print one or more copies of the MRA
3. View the MRA

2. Print MRAs

1 MRA has been received.

Authorization: 242728 ▼ **View**

copies to print: 2

Print All **Close**

3.

**Please note**: DC Operations require that you wait for the 'barcoded' MRA. We are working to incorporate the barcode into the electronic MRA. Thank you for your patience.

MRA – Merchandise Return Authorization

- Once you return the products to the DC, the Credit Department will process the credit.

- When the credit is approved, your MRA will become the credit invoice.