



QUICK REFERENCE GUIDE

Version 1.2

No. 1 - Creating a Standard Order

START HERE

1. Log in to iRIS4 with your PIN & password to access the home screen.
2. Click **Create Order** from the left hand menu.
3. Enter the client search criteria & click **Search** to find your client.
4. If you can't find your client in the search results, proceed to step 17.
5. Find your client on the results page then click the  on the relevant row.
6. Check the client details and any pending orders then click **Create Delivery** at the top of the page.
7. Click **Add Products**.
8. Enter the product code in the search box & click **Search** or browse the products using the categories shown.
9. Click  beside the thumbnail image to add the product to the order in 1 go. If you need more product information, click on the

← Outer Fold →

thumbnail image to display the product detail page, then click **Add to Basket**.

10. Repeat steps 7 - 9 until you have selected all of the product that you wish to order.

11. Click **Place Requisition**.

12. Complete the 'Requisition Details' section at the top of the page and check/amend the delivery address as required.

13. In the 'Order Options' section, select the desired service level then enter any delivery instructions or sensitive information relevant to the order.

14. Click **Confirm Delivery Instructions**.

15. If your order requires authorisation, select an authorisation manager from the drop-down list at the top of the page then click

Confirm and Place Requisition.

If no authorisation is requested, click **Confirm Authorised Order**.

16. Note the order number displayed. You can click **Create PDF** to download a copy of your requisition if required or simply click Click here to view activity note to print a copy directly from here. **FINISH HERE**

17. Click **Create New Client**.

18. Complete the 'Service User/Customer details' section of the page taking care to ensure that all information entered is accurate & correct.

19. Enter the clients post code in the 'Service User/Customer Address' section, then click **Find**. A list of matching addresses will be

← Inner Fold →

populated in to the scrollable list. Click on the correct client address to select it.


20. Change/update any of the address fields as required then repeat the process for the alternate address.

21. Click **Add Client**.


22. Proceed to step 6.

No. 2 - Creating a Specials (non-stock) Order

START HERE


1. Log in to iRIS4 with your PIN & password to access the home screen.
2. Click **Create Order** from the left hand menu.
3. Enter the client search criteria & click **Search** to find your client.
4. If you can't find your client in the search results, create a new client (See No.1, 17-21)
5. Find your client on the results page then click the  on the relevant row.
6. Check the client details and any pending orders then click **Create Delivery** at the top of the page.
7. Click **Add Products**.
8. Click **Create Special Order**.
9. Enter a description of the special item that you wish to order in the 'Description' input box.


10. Enter the name (or part of the name) of the supplier in the 'Supplier' input box next the 'Search by Name' button.

11. Click 

12. Select the correct supplier from the drop-down list.

13. Complete the rest of the rest of the form taking care to ensure that all information entered is accurate & correct.

14. Attach any relevant documents (quotes etc.) to the form using the  button.

15. Click 

16. Click 

17. Complete the 'Requisition Details' section at the top of the page and check/amend the delivery address as required.

18. In the 'Order Options' section, select the desired service level then enter any delivery instructions or sensitive information relevant to the order.



19. Click 

20. If your order requires authorisation, select an authorisation manager from the drop-down list at the top of the page then click



If no authorisation is requested, click




21. Note the order number displayed. You can click  to download a copy of your requisition if required or simply click  to print a copy directly from here.




No. 3 - Creating a Collection


START HERE

1. Log in to iRIS4 with your PIN & password to access the home screen.

2. Click  from the left hand menu.

3. Enter the client search criteria & click  to find your client.

4. If you can't find your client in the search results, create a new client (See No.1, 17-21)

5. Find your client on the results page then click the  on the relevant row.

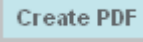

6. Identify the item to be collected in the 'Current Items at Address' section and place a tick in the 'For Coln.' column against your chosen item. If you need to request collection of an item that is not in the list, proceed to step 12.

7. Click 

8. Complete the 'Collection Details' section at the top of the page and check/amend the collection address as required.

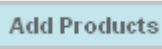
9. Select the desired service level then enter any collection instructions or sensitive information relevant to the order.


10. Click 


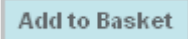
11. Note the order number displayed. You can click  to download a copy of your requisition if required or simply click  to print a copy directly from here.




12. Click 

13. Click 

14. Enter the product code in the search box & click  or browse the products using the categories shown.













15. Click  beside the thumbnail image to add the product to the order in 1 go. If you need more product information, click on the thumbnail image to display the product detail page, then click .

16. Repeat steps 7 - 9 until you have selected all of the product that you wish to add.

17. Click 

18. Go back to step 6.

Guide to Symbols

-  Context Sensitive Help (Click for help)
-  Add this item to my order
-  This is a Hire item
-  Remove order line / cancel order
-  Send email reminder to authoriser
-  Change the authoriser
-  Create & send message to prescriber or authoriser
-  Read messages or send another
-  Authorise this order
-  View client or order
-  This order has not yet been authorised
-  This item is assigned to a service level group