



01 A budget manager's guide to creating a schedule order

shop4support's Budget Manager allows you to create a purchase order or a schedule order.

A **schedule order** is a request for service that often requires a face to face meeting to take place before the schedule is confirmed and payment arranged. The Schedule Order Wizard allows you to set a repeating pattern for a service over a set period of time. A purchase order will be generated automatically from the information contained in the schedule.

A **purchase order** can be more immediate, and if accepted by the provider, can be processed relatively quickly.

Both order types are sent to a provider for confirmation. You can make multiple orders by placing your products or services in the shopping basket.

This document explains how you, the budget manager, can create a schedule order.

Creating a schedule order

The budget manager is responsible for administering the order process on behalf of the individual. They will raise a purchase or schedule order for the individual and will be responsible for reconciling purchases and funding against an actual bank statement.

To create a schedule, you must:

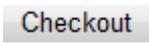
1. Select a service from the catalogue and add it to the shopping basket



The screenshot shows the 'Ordering from the Catalogue' interface. On the left is a 'Categories' sidebar with 'Nursing Care Services' highlighted. The main area displays a table of services with columns for Action, Product code, Product name, Appointment(s) Duration, Availability, Supplier name, and Manufacturer. The 'My Basket' icon in the top right shows 2 items and a 'Checkout' button.

| Action | Product code | Product name | Appointment(s) Duration | Availability | Supplier name | Manufacturer |
|-------------------------------------|--------------|---------------|-----------------------------|--|--------------------|--------------|
| <input type="checkbox"/> | RA001f | Day Care | 1hrs 0min, 1 days, 1 weeks | Sat to Sun 12:00 a.m. - 11:59 p.m. | Rob the Supplier | ACME |
| <input checked="" type="checkbox"/> | AA08 | Service No.8 | 2hrs 0min, 1 days, 1 weeks | Mon to Fri 08:00 p.m. - 08:00 a.m. | AA Associates Ltd. | AAMan |
| <input checked="" type="checkbox"/> | AA06 | Service No.6 | 1hrs 0min, 5 days, 4 weeks | Mon to Thu 07:00 a.m. - 02:00 p.m. Fri 09:00 a.m. - 01:00 p.m. | AA Associates Ltd. | AAMan |
| <input type="checkbox"/> | AAMan09 | Service No.9 | 4hrs 0min, 2 days, 4 weeks | Sat to Sun 08:00 a.m. - 08:00 p.m. | AA Associates Ltd. | AAMan |
| <input type="checkbox"/> | AAMan010 | Service No.10 | 10hrs 0min, 1 days, 1 weeks | Sat to Sun 12:00 a.m. - 11:59 p.m. | AA Associates Ltd. | AAMan |

Fig. 1 Ordering from the Catalogue

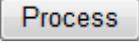
2. When you have selected all the items you need, click on the Checkout icon  at the right hand corner of the screen.

You will then be taken to the Order Summary page.

| Im Justan Individual | | | | + Add More Items | Finish shopping |
|---------------------------|-----------------------------|----------------|-----------------------------|------------------|-----------------|
| AA Associates Ltd. | | | | | |
| Action | Items that can be scheduled | Price per unit | How many appointment times? | Status | |
| | Service No.8 | £27.00 | 2 | Outstanding | |
| | Service No.6 | £15.00 | 1 | Outstanding | |

Process

Fig. 2 Order Summary

- Next, you must select your appointments. The default value for the number of appointments is 1, however you can select up to 12 appointments at one time. In the example above, 2 appointments have been requested for the item 'Service No.8.'
- Once you have selected your appointments you must then click on the Process button  this will take you to Step 1 of the Schedule Order Wizard.

Schedule Order Wizard:

Step 1 – A list of your chosen items will be displayed on screen. You must enter your requested date and time for the appointments by selecting the calendar icon .

Delivery dates & times Next 

Provider name: AA Associates Ltd.

| Action | Item name | Unit quantity | Unit of measure | Unit price | Total VAT | Date/times available | Requested date | Appointment times | Total units | Total gross |
|--------|--------------|---------------|-----------------|------------|-----------|---|----------------|-------------------|-------------|-------------|
| | Service No.6 | 1 | Session | £15.00 | 20.0 | Mon to Thu 07:00 a.m. - 02:00 p.m. Fri 09:00 a.m. - 01:00 p.m. | | | | £0.00 |
| | Service No.8 | 1 | Hourly | £27.00 | 0.0 | Mon to Fri 08:00 p.m. - 08:00 a.m. | | | | £0.00 |
| | Service No.8 | 1 | Hourly | £27.00 | 0.0 | Mon to Fri 08:00 p.m. - 08:00 a.m. | | | | £0.00 |

Recalculate

Total for this order Total (gross) £0.00

Scheduled totals Total (gross) £0.00

Request a date for the appointment

Fig. 3 Wizard Step 1 Delivery Dates & Times

The screen shot below shows a completed order. If you change your mind, items can be deleted at this stage before progressing to Step 2.

The circular indicator on the right hand side of the table indicates that a repeating pattern has been set for a specific item.

Click on the 'Next' button to be taken to Step 2.

Delivery dates & times Next

Provider name: AA Associates Ltd.

| Action | Item name | Unit quantity | Unit of measure | Unit price | Total VAT | Date/times available | Requested date | Appointment times | Total units | Total gross | |
|--------|--------------|---------------|-----------------|------------|-----------|--|----------------|-------------------------|-------------|-------------|--|
| | Service No.6 | 1 | Session | £15.00 | 20.0 | Mon to Thu 07:00 a.m. - 02:00 p.m. Fri 09:00 a.m. - 01:00 p.m. | 06/06/2011 | 09:00 a.m. - 10:00 a.m. | 3 | £45.60 | |
| | Service No.8 | 1 | Hourly | £27.00 | 0.0 | Mon to Fri 08:00 p.m. - 08:00 a.m. | 06/06/2011 | 08:00 a.m. - 10:00 a.m. | 60 | £1,620.00 | |
| | Service No.8 | 1 | Hourly | £27.00 | 0.0 | Mon to Fri 08:00 p.m. - 08:00 a.m. | 02/06/2011 | 03:00 p.m. - 05:00 p.m. | 60 | £1,620.00 | |

Recalculate

Total for this order Total (gross) £0.00

Scheduled totals Total (gross) £3,285.60

Fig. 4 SO Wizard Step 1 Completed

Step 2 – Here, you can request a date and time for an assessment meeting with the service provider.

Depending on the setting permissions of the organisation, a unique Document Reference number can be set, or a system generated number will be displayed.

This Document Reference Number will be used as the prefix for any automatically generated purchase orders.

Once you are happy with the details on this screen, click the Next button to proceed to Step 3.

Additional information Previous Next

| Doc ref | Doc type | Item name | Requested date | Appointment times |
|-------------|----------|--------------|----------------|-------------------------|
| 000032-0009 | Schedule | Service No.8 | 06/06/2011 | 08:00 a.m. - 10:00 a.m. |
| 000032-0010 | Schedule | Service No.6 | 06/06/2011 | 09:00 a.m. - 10:00 a.m. |
| 000032-0011 | Schedule | Service No.8 | 02/06/2011 | 03:00 p.m. - 05:00 p.m. |

Request assessment meeting for schedules

Date & time: : am pm Location:

Notes

Attach notes to purchase orders Attach notes to schedule orders

Select notes template:

Fig. 5 SO Wizard Step 2 Additional Information

Step 3 – You will be shown a summary of the scheduled meetings.

The automation options at the bottom of the screen allow you to choose the option of the creation of a purchase order on a weekly or monthly basis before the first order is due.

There is also the option to auto confirm delivery notes.

Once you are happy with the details on this screen, click the Next button to proceed to Step 4.

Schedule automation ← Previous Next →

| <input type="checkbox"/> | Custom number | Document type | Item name | Requested date | Appointment times | Schedule automation |
|-------------------------------------|---------------|---------------|--------------|----------------|-------------------------|---|
| <input checked="" type="checkbox"/> | 000032-0009 | Schedule | Service No.8 | 06/06/2011 | 08:00 a.m. - 10:00 a.m. | Weekly, 1 weeks, Don't confirm delivery notes |
| <input checked="" type="checkbox"/> | 000032-0010 | Schedule | Service No.6 | 06/06/2011 | 09:00 a.m. - 10:00 a.m. | Weekly, 1 weeks, Don't confirm delivery notes |
| <input checked="" type="checkbox"/> | 000032-0011 | Schedule | Service No.8 | 02/06/2011 | 03:00 p.m. - 05:00 p.m. | Weekly, 1 weeks, Don't confirm delivery notes |

Automation options

Weekly Send weeks before first order Auto confirm delivery notes
 Monthly

Fig. 6 SO Wizard Step 3 Schedule Automation

Step 4 – At this stage you can input delivery and invoice details. You will be given the option to select the default address for the account, add a new address, or select an address saved from a previous order.

Once you have completed this section, click on the Next button to proceed to Step 5.

Address details ← Previous Next →

Delivery address: 2 Smithy Court, Wigan
 Delivery note:

Invoice address: 2 Smithy Court, Wigan

Delivery details:

| Item name | Ordered units | Price |
|--------------|---------------|-----------|
| Service No.6 | 3 | £45.60 |
| Service No.8 | 60 | £1,620.00 |
| Service No.8 | 60 | £1,620.00 |

Total net: £3,277.50
 Total VAT: £7.50
 Total cost (including VAT): £3,285.00

Fig. 7 SO Wizard Step 4 Address Details

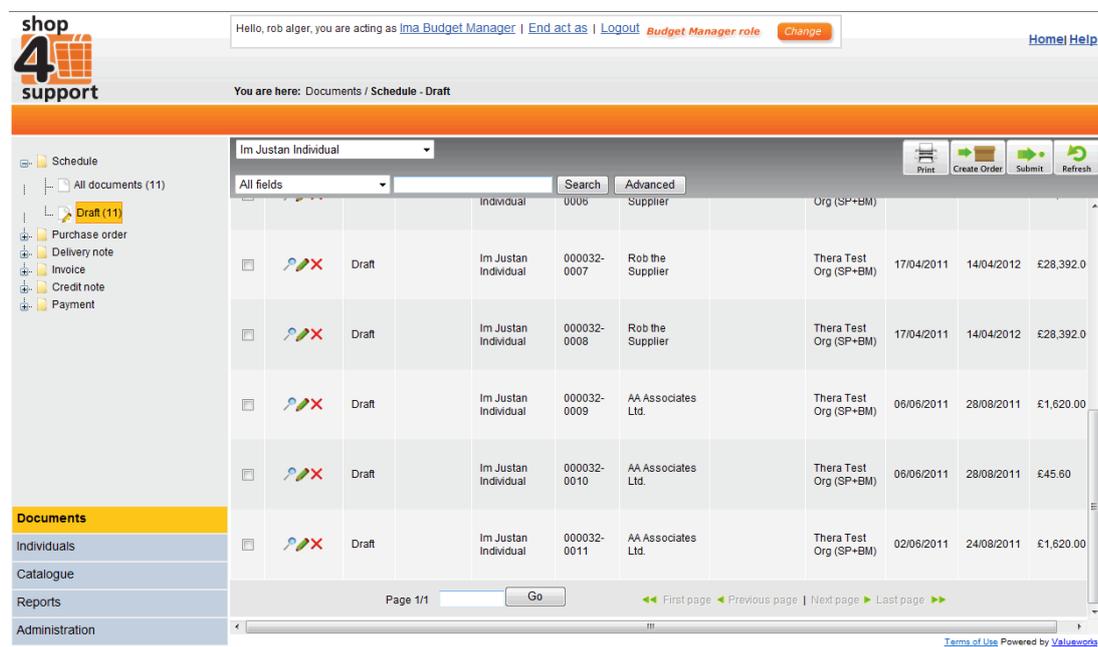
Step 5 – You will be provided with a final summary of the schedule order. If you are happy with the details click on the Finish button.




| Custom number | Document type | Item name | Requested date | Payment method |
|---------------|---------------|--------------|----------------|----------------|
| 000032-0009 | Schedule | Service No.8 | 06/06/2011 | Offline |
| 000032-0010 | Schedule | Service No.6 | 06/06/2011 | Offline |
| 000032-0011 | Schedule | Service No.8 | 02/06/2011 | Offline |

Fig. 8 SO Wizard Step 5 Confirmation

Upon completion of the Schedule Order Wizard, a draft order will be created in the Documents/Schedule – Draft area of Budget Manager, as shown below. This is now ready for you to review.



The screenshot shows the 'shop 4 support' interface. The user is logged in as 'Ima Budget Manager'. The breadcrumb trail indicates 'Documents / Schedule - Draft'. A sidebar on the left shows a tree view with 'Draft (11)' selected under 'Schedule'. The main area displays a table of draft orders for 'Im Justan Individual'.

| Item name | Item ID | Supplier | Org (SP+BM) | Start Date | End Date | Amount |
|----------------------|-------------|--------------------|------------------------|------------|------------|-----------|
| Im Justan Individual | 000032-0007 | Rob the Supplier | Thera Test Org (SP+BM) | 17/04/2011 | 14/04/2012 | £28,392.0 |
| Im Justan Individual | 000032-0008 | Rob the Supplier | Thera Test Org (SP+BM) | 17/04/2011 | 14/04/2012 | £28,392.0 |
| Im Justan Individual | 000032-0009 | AA Associates Ltd. | Thera Test Org (SP+BM) | 06/06/2011 | 28/08/2011 | £1,620.00 |
| Im Justan Individual | 000032-0010 | AA Associates Ltd. | Thera Test Org (SP+BM) | 06/06/2011 | 28/08/2011 | £45.60 |
| Im Justan Individual | 000032-0011 | AA Associates Ltd. | Thera Test Org (SP+BM) | 02/06/2011 | 24/08/2011 | £1,620.00 |

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Fig. 9 Draft Schedule Orders

Reviewing a Draft Schedule Order

To review a draft schedule order click on the Edit icon  in the action column. This will display the schedule order details in a tab format as shown below.

You will see several tabs at the top of this screen. The following is a description of each tab:

Main tab – the main tab displays a general summary of the order.

Fig. 10 Main Tab Draft SO

Assessment meeting – this tab displays the details of the assessment meeting with the service provider. You can edit any fields within this area as long as the order is in draft format and has not yet been confirmed.

Fig. 11 Assessment Meeting tab

Catalogue items – this tab displays the service that has been ordered and appointment times.

| Item name | Unit quantity | Unit of measure | Unit price | VAT% | Daytime available | Requested date | Appointment times |
|--------------|---------------|-----------------|------------|------|---------------------------------------|----------------|-------------------------|
| Service No.8 | 1 | Hourly | £27.00 | 0.0 | Mon to Fri 08:00 p.m. - 08:00 a.m. | 02/06/2011 | 03:00 p.m. - 05:00 p.m. |

Fig. 12 Catalogue Items tab

Address details – this tab displays Delivery and Invoice addresses, you can edit these details as long as the order is still in draft format and has not yet been confirmed.



Fig. 13 Address Details tab

Appointments – this tab displays a weekly overview of all appointments. When all orders have been issued for a given weekly period a tick will appear in the order issued column.

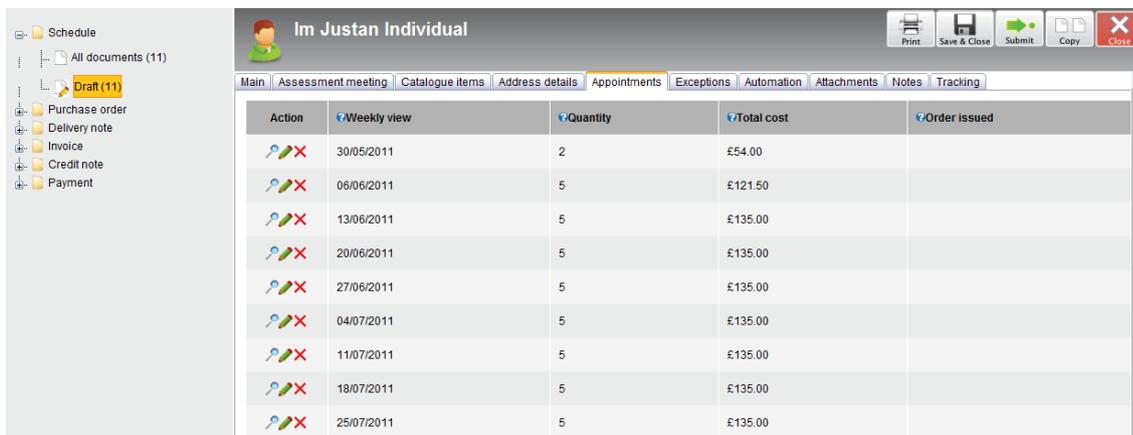


Fig. 14 Appointments tab

You can click on the Edit icon of a specific week to view a breakdown of daily orders within that selected week.

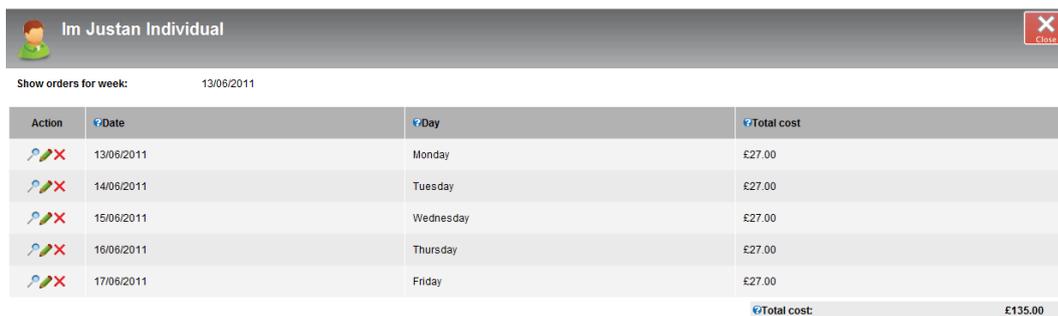


Fig. 15 Appointment drilldown

By clicking the Edit icon for a specific day you can see multiple orders that occur on that day.

Exceptions – this tab displays any single appointments that have been changed.

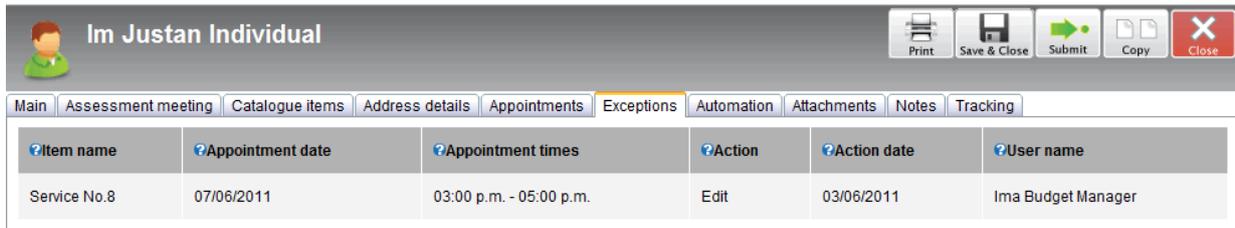


Fig. 16 Exceptions tab

Automation – this tab displays the settings for the creation of purchase orders prior to their due date.

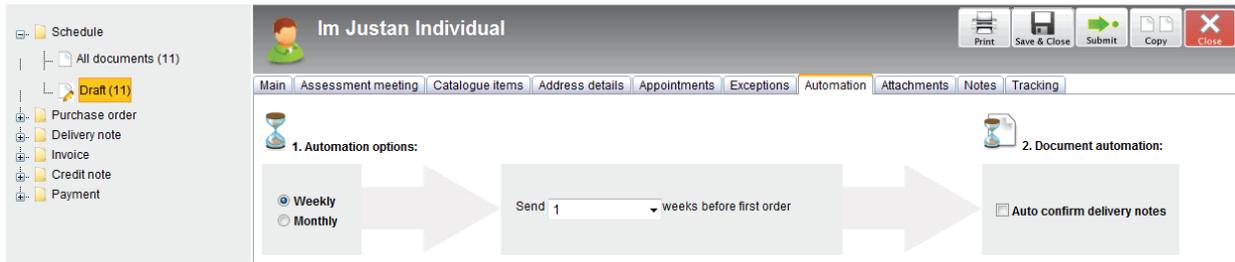


Fig. 17 Automation tab

Attachments – this tab displays a list of attachments that you have placed. You can view, delete or upload attachments from this screen.



Fig. 18 Attachments tab

Notes – this tab displays any notes about an order. You can add extra notes via this screen.

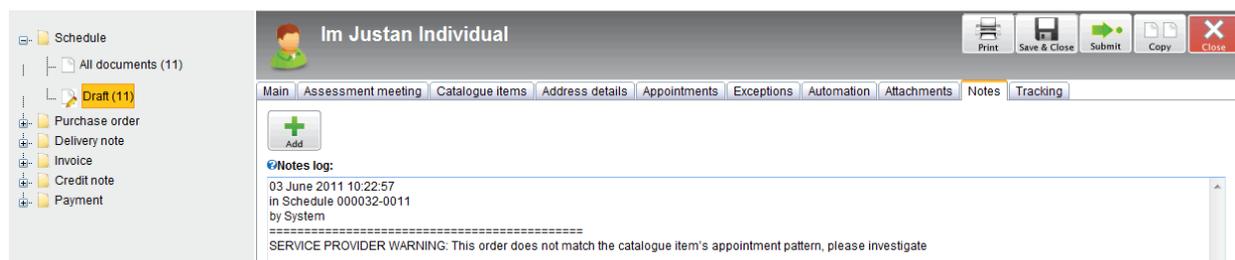


Fig. 19 Notes tab

Tracking – this tab displays any changes made to the order and who made those changes. A historical version of the document is available in view only mode.

| Action | Date/Time | User | Changes |
|--------|---------------------|--|---------|
| | 03/06/2011 09:38:00 | rob alger (acting as Ima Budget Manager) | Create |
| | 03/06/2011 10:23:00 | rob alger (acting as Ima Budget Manager) | Edit |

Fig. 20 Tracking