NHS Supply Chain

New online catalogue: user guide

NHS Supply Chain

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How to use the new online catalogue

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Introduction

Welcome to the user guide for the new online catalogue.

The new online catalogue includes both new and improved existing features to enhance your experience.

We've focused on developing features that are easy to use and accessible, helping you to find the right product when you need it.

This user guide covers each part of the online catalogue, but if you'd prefer to watch one of our 'How To...' videos, click the link below.

Prefer learning by video?

https://www.supplychain.nhs.uk/resource-hub/
Click this link to watch our 'How To' videos, taking you through each part of the new online catalogue. You will need the password to access this.



Login and single sign on

Your trust will need to confirm that you require access to the catalogue, along with the appropriate catalogue role, permissions and financial limits.

Once your account has been set up, you'll receive an email. Ask the Lead Users or the customer service team in your organisation to provide you with the email sender name.

The email will contain an 'accept invitation' link you need to click on.

Select 'accept' on the message box requesting permission.

You'll then be taken to the catalogue home page. Click 'pilot user login' – this should automatically log you in, allowing you to view trust prices and stock availability.

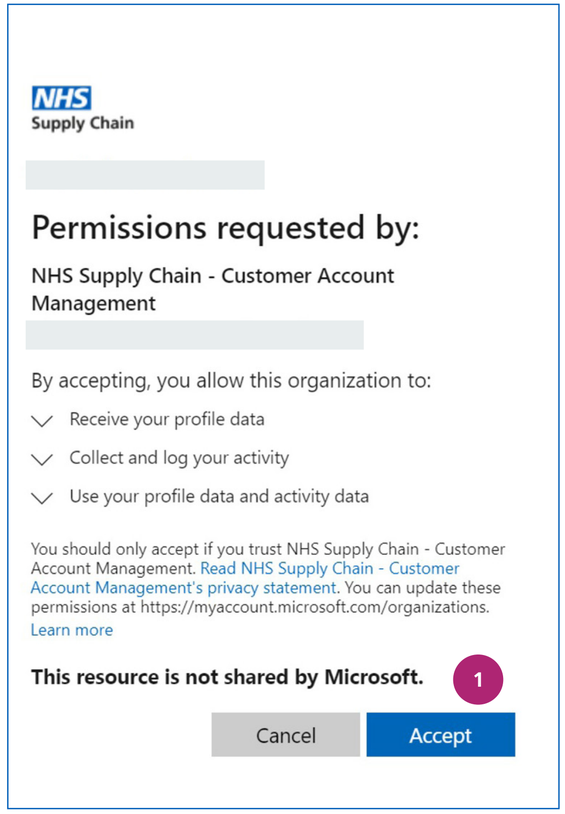
Did you know?

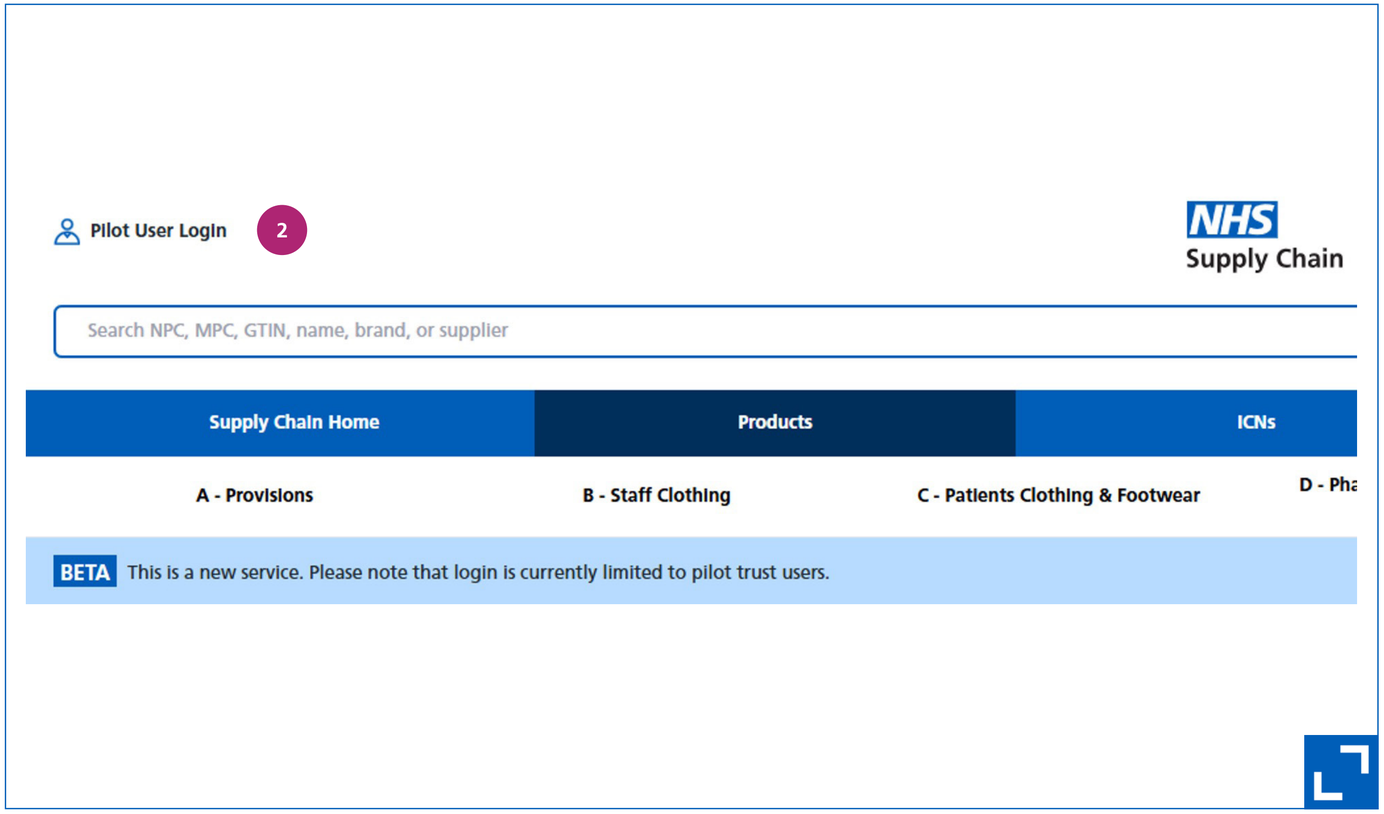
Once you've logged in for the first time, the system will remember you. There's no need to keep entering your ID or password.

Please bookmark this URL to make it easy to return to the Catalogue: https://pilot.supplychain.nhs.uk/



Login and single sign on





1. Select 'Accept' on the message box requesting permission.
2. Click 'Pilot user login' to be automatically logged in.

Keeping your account safe

To keep your user account safe, you may occasionally be required to use Multi Factor Authentication (MFA) when logging in. Most organisations already use MFA and this will work in the same way.

Product search and browse / product comparison

Begin searching and browsing for products.

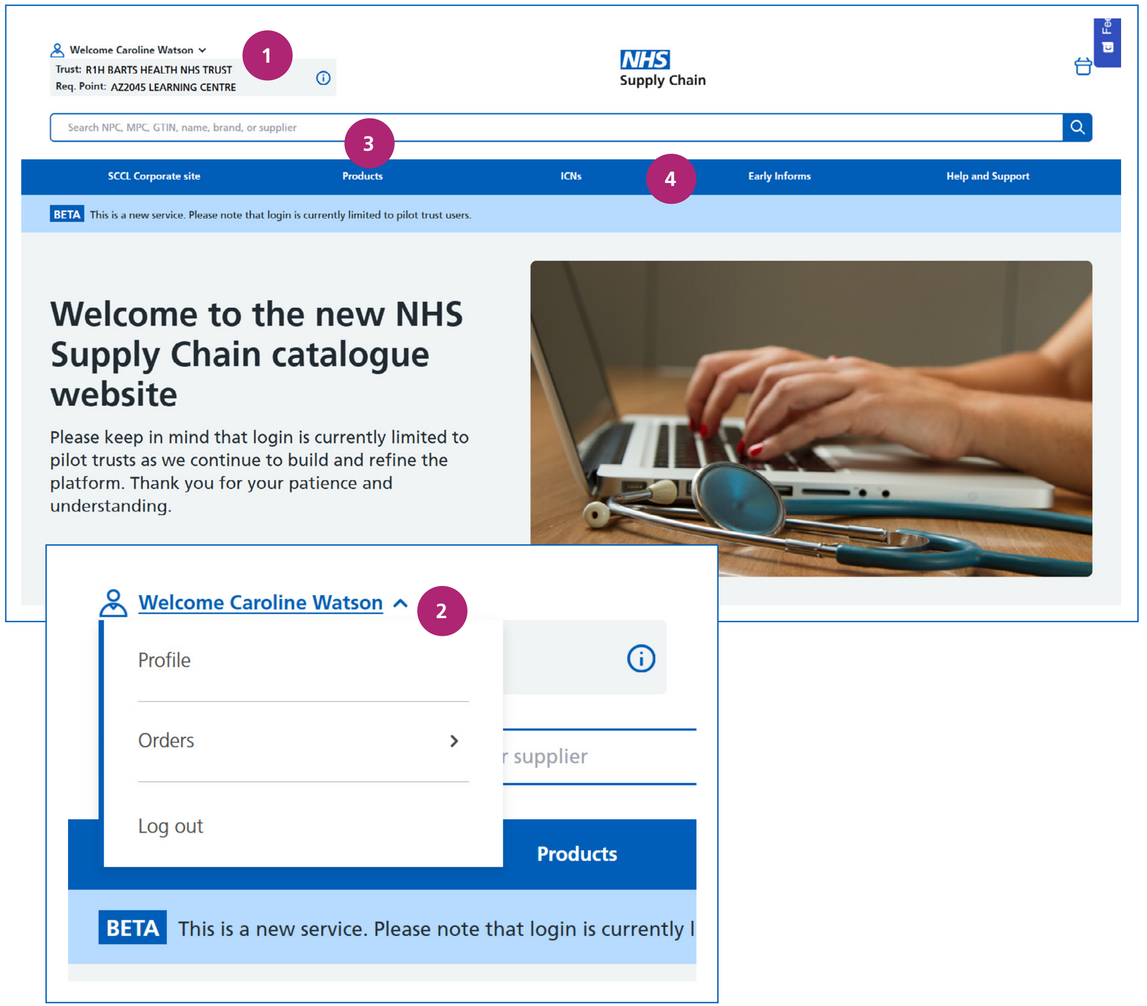
You'll need to login to see prices and stock availability.

You'll find the Requisition Point (Req. Point) you're assigned to under your name. To change the one you're ordering against click on the Req. Point name displayed and select an alternative. You can find out more about changing Req. Point on page 12.

Click your name to view your profile information, user role and financial limit. From here, you can also access your order history, details of your orders, and items for approval.

The blue navigation bar enables you to browse products by NHS eClass and easily access the help and support area.

The other menu options will navigate you away from the catalogue to our information website.



1. Your Requisition Point (Req. Point) is under your name. Click on this to select an alternative if you need to.
2. Click your name to view profile information, user role, and financial limit. You can also view order history, order details, and items for approval.
3. Browse products by selecting 'Products' or use the search bar.
4. The other menu options in the blue navigation bar will navigate you away from the catalogue to our information website.

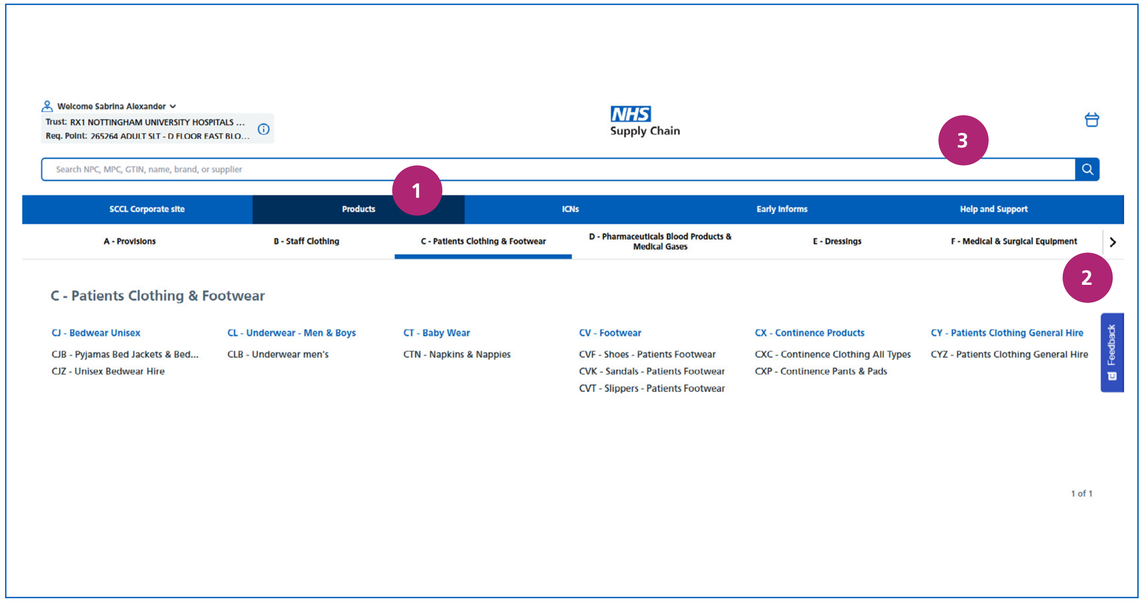
Searching and browsing products

This section covers how you can browse for products using either the blue bar or the search bar.

There are two ways you can look for products:

By clicking on 'Products' in the blue bar, you can browse products by eClass categories and the products beneath each of those. Use the chevrons to scroll right for more categories.

Alternatively, use the search bar to enter free text, NPCs, MPCs, GTINs, brand or supplier.



1. Click on 'Products' in the blue bar to search by eClass categories.
2. Use the chevrons to scroll for more categories.
3. Use the search bar to search by free text, NPCs, MPCs, GTINs, brand or supplier.

Search results

This covers how to navigate the results page. You can find out more about products or show buying options, and refine searches using filters.

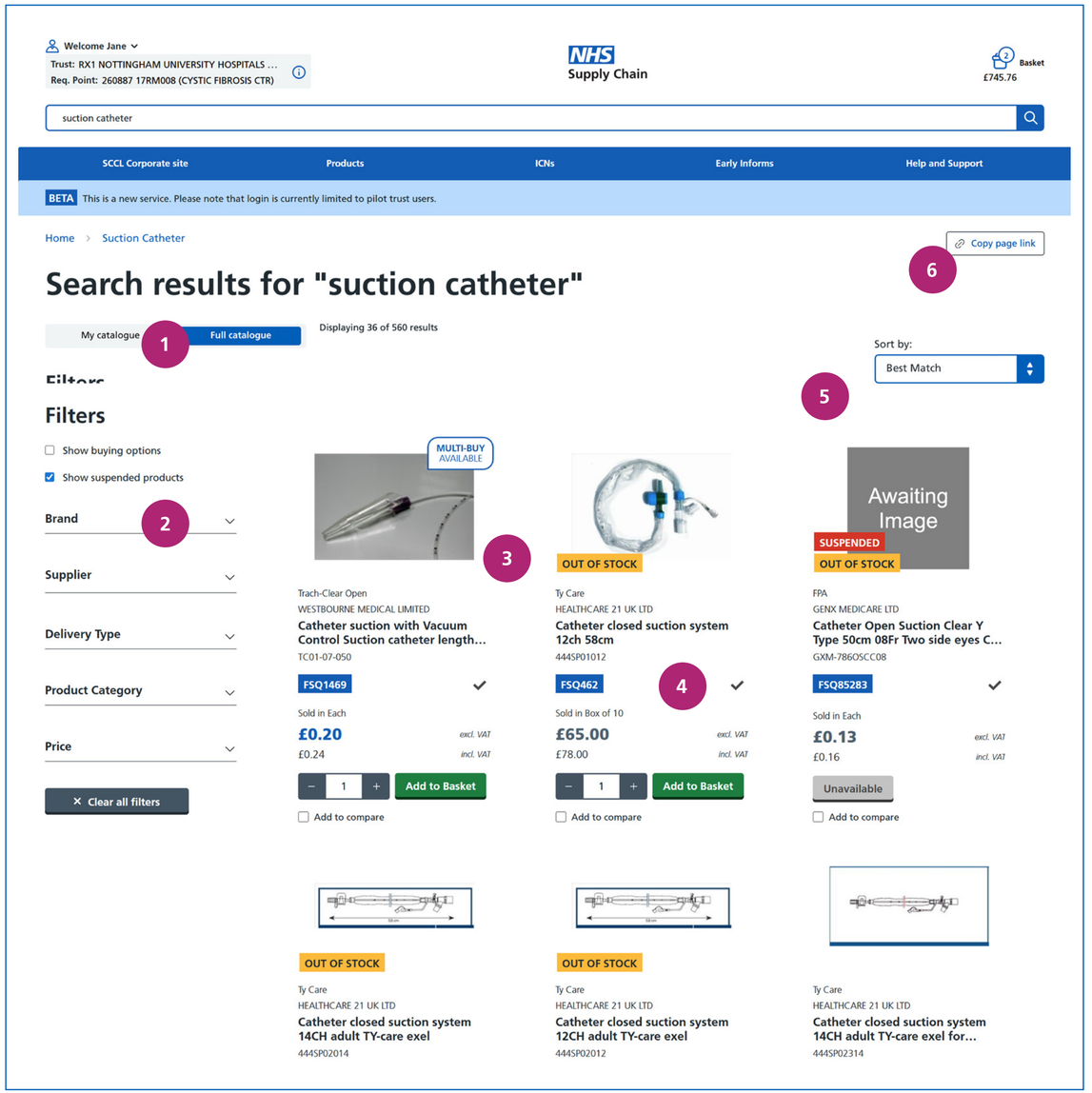
Once you've typed in a search, for example 'suction catheter', the results will appear in a list.

You'll see the products available to you, determined by your Trust Administrator, in 'My Catalogue'. Two price variants (including / excluding VAT) are visible. If you wish to expand your research further, you can toggle to 'Full catalogue' to see the full range of products for that search term available from NHS Supply Chain.

Stock rules work the same as today. If you wish to purchase a restricted item, you'll need to contact the Trust Administrator for your catalogue.

Refine your search:

- Ticking the 'Show buying options' in the full catalogue will highlight which products are restricted to purchase at your organisation.
- You can also tick 'Show suspended products' if you'd like these to show in your search results.
- Multiple filters help narrow down your results.
- Use 'Sort by' options to reorder your search results.
- Multibuy labels highlight products which have discounts for purchasing more than one.
- View additional images where available by clicking the chevrons on the image carousel.



1. Toggle between 'My Catalogue' and 'Full catalogue'.
2. Use the options on the left to refine your search further.
3. Out of stock items are indicated with a yellow bar.
4. A tick icon means the product is stocked by NHS Supply Chain. An 'e' icon means eDirect. If you hover over these icons, lead times will be visible.
5. Select the 'Sort by' drop down menu to reorder your results.
6. You can share your search results with a colleague by selecting the copy page link.

Product description page

You can find out more by clicking into a product. This section covers everything that you can browse from this page.

Clicking on a product from the search results page will take you to the product description page.

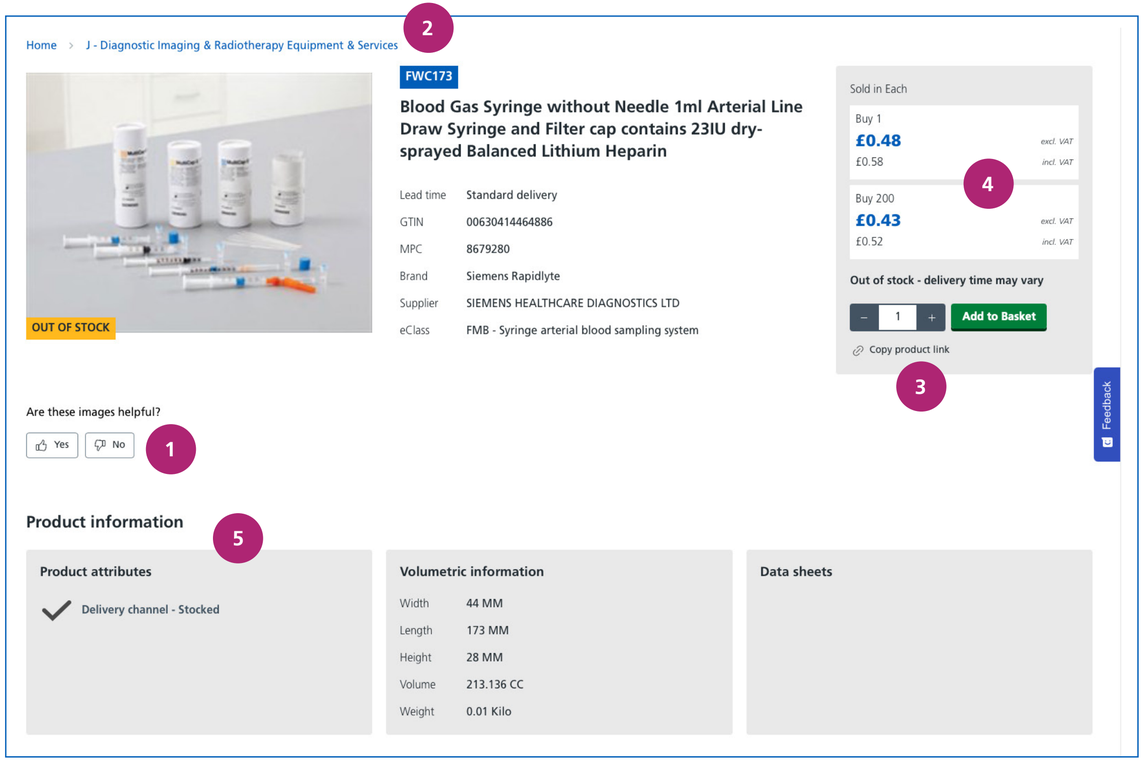
The breadcrumb trail allows you to navigate up the eClass categories to view other products in that category.

Multibuy pricing show products which have discounts for purchasing more than one.

Easily share the product with colleagues by selecting 'Copy product link' and then paste it into MS Teams or email.

Voting buttons – let us know if the images help your research or purchasing decision so we know areas we need to improve on.

The Product Information section details product attributes, such as Waste Electrical and Electronic (WEEE) regulations, delivery channel, Control of Substances Hazardous to Health Regulations (COSHH), electromedical and volumetrics information, and data sheets, where available.



1. Use the voting buttons to let us know if the images are helpful.
2. Navigate to other products in the same category with the breadcrumb trail.
3. Click the 'Copy product link' to copy the link. Paste into MS Teams or email to share.
4. View multibuy discounts available for the product.
5. Scroll down the page to view product information.

Compare

You can compare up to four items at one time. This section explains how to add or remove products from your comparison list.

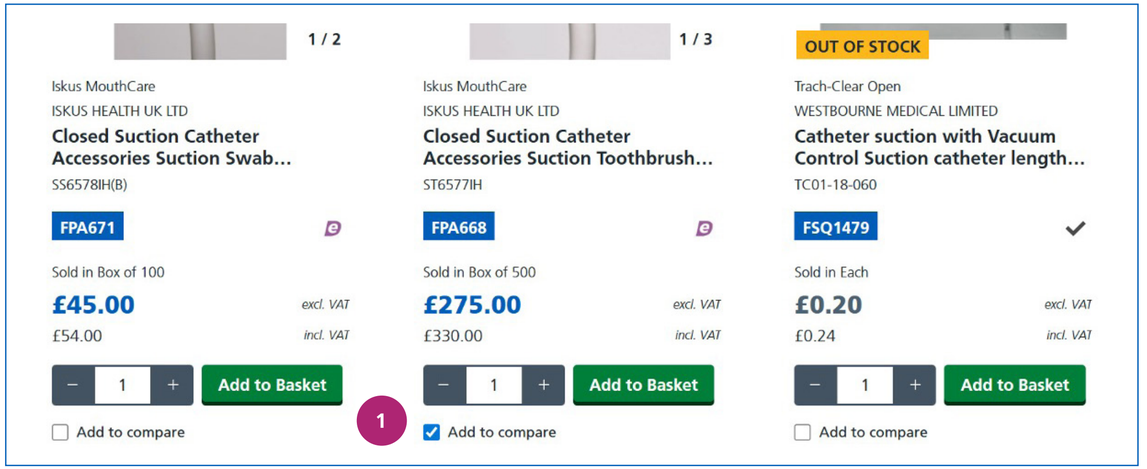
Easily compare up to a hundred items by selecting 'Add to compare' on your search results screen.

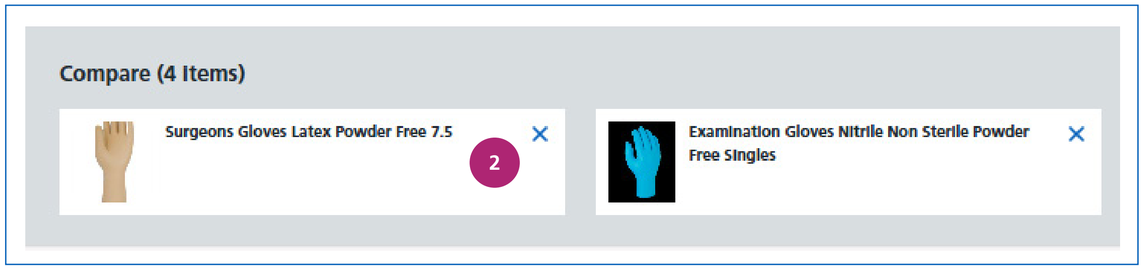
Selected items show on the bar at the bottom. Add and remove products (click on the 'x' in the top right corner to remove an item) until you're happy. Select 'Go to compare' to view them.

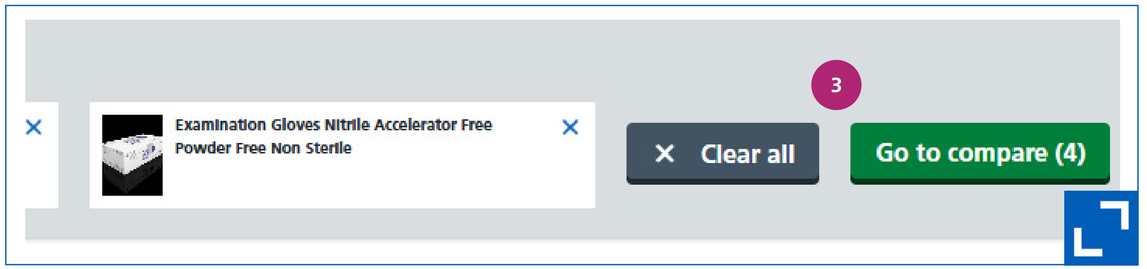
You must select at least two products before the 'Go to compare' button is enabled.

Tip

This is the best way to compare unit prices, as the compare page details the price per unit when they are sold in boxes of multiple units.







1. Add a product to your comparison list by selecting 'Add to compare'.
2. The products are on a bar at the bottom of the screen. Remove items by clicking the 'x'.
3. Click either 'Clear all' to begin a new selection, or click 'Go to compare' to view the comparison. You need to select at least two items for the 'Go to compare' button to be enabled.

Product comparison page

This section shows how to compare up to four products with a more in-depth view your selected products.

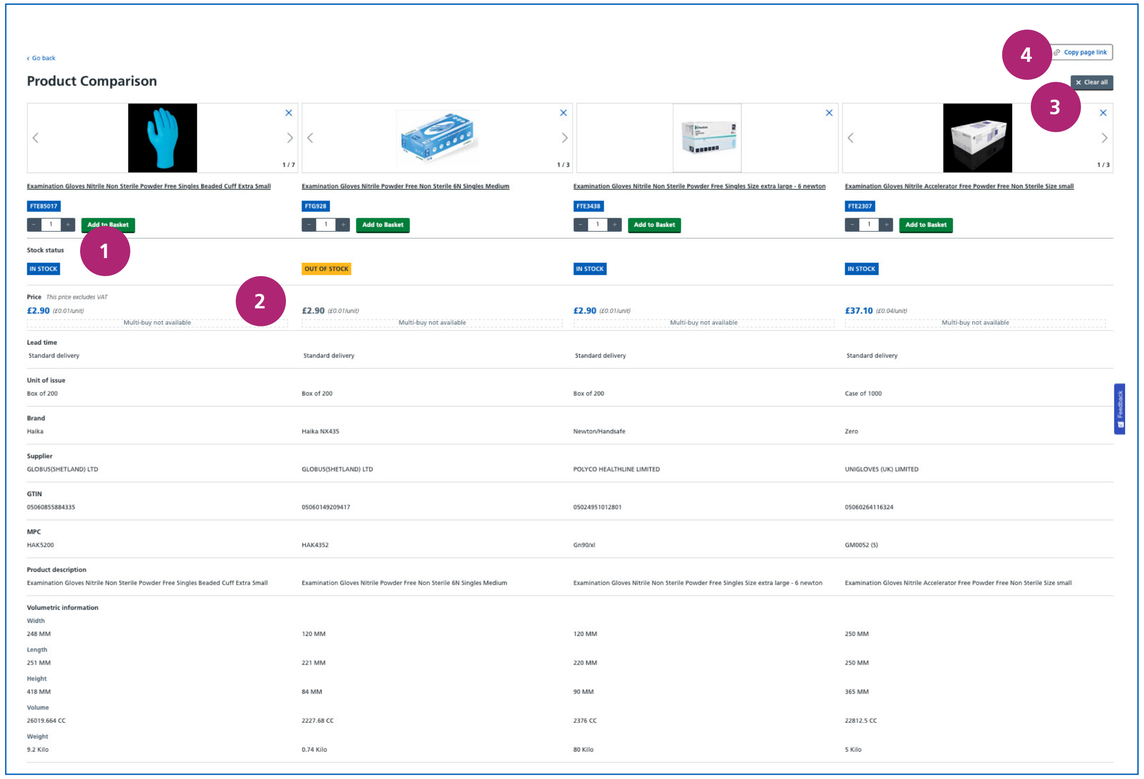
Here you'll see a side by side comparison of your chosen products. Scroll down the screen for more information.

If you've clicked to 'show buying options' on your initial search, the compare view will show which items are restricted by your organisation.

Restricted items will show as 'unavailable' to all users except Trust Admin, Unrestricted Order Placer and Unrestricted Order and Approve roles. (For these roles, an 'Add to basket' button will show).

For all other products you will have the option to add to basket, as long as the items are in your catalogue.

Use your browser back button to go back to your search results or click into the product for further details.



1. View status updates on the Product Comparison page.
2. Prices are included on this screen, and any available multi buy offers.
3. Use the grey 'Clear all' button to clear your selection.
4. You can share your search results with a colleague by selecting the copy page link.

Advanced product comparison

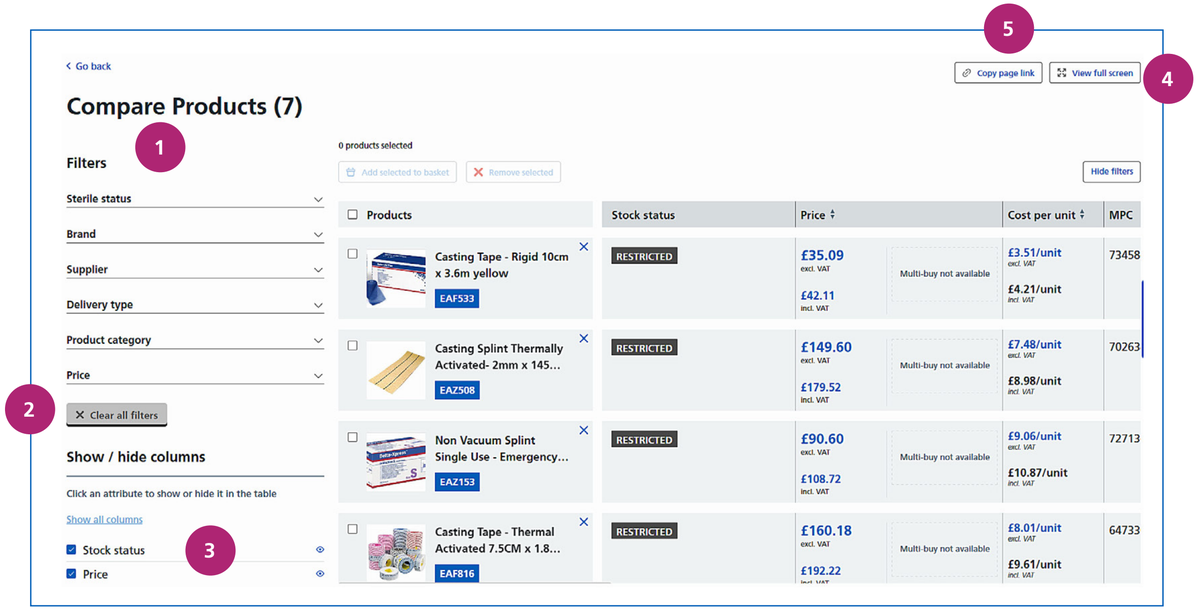
This page covers how to use the advanced product comparison feature.

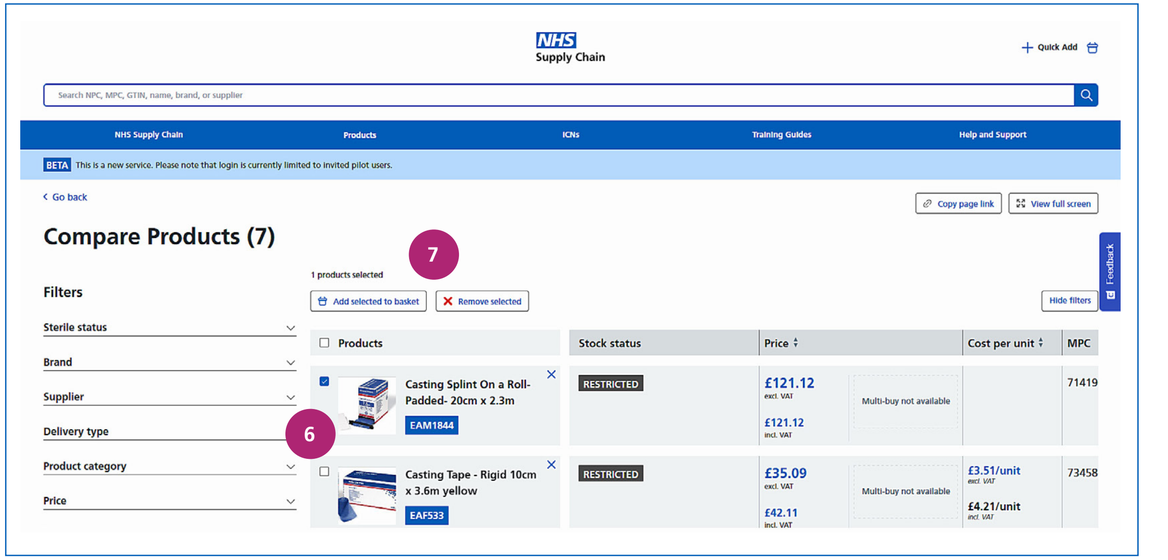
After selecting 'Go to compare', you can use the comparison page to review products side by side and focus on the information that matters most.

Use filters to narrow the products shown and clear them at any time to return to the full comparison. You can also show or hide product information columns and switch to full-screen view for a larger display.

To share your comparison, select 'Copy page link' and paste the link into an email or message.

When you've chosen the products you want, use the checkboxes to select individual items or select all products at once.
Then choose 'Add selected to basket' to add them to your basket or 'Remove selected' to remove them from the comparison.





1. If you want to focus on specific products, use the filters to narrow down the ones shown.
2. You can clear the filters whenever you want to see the full comparison again.
3. You can also show or hide columns of product information, making it easier to focus on the details you want to compare.
4. For a larger view select the 'View full screen' button. To leave full screen, select the 'Exit full screen' button or press 'Escape' on your keyboard.
5. To share the comparison page, select 'Copy page link'.
6. When you've decided which products you want to work with, use the checkboxes to select them individually. Or select the checkbox in 'Products' to select them all.
7. To add your selected products to your basket, choose Add selected to basket. If you want to remove the selected products from your comparison instead, choose Remove selected.

Add to basket and checkout

You will need the following to begin:

To be able to order you must be logged in, and have the user role:

- Order Placer
- Unrestricted Order Placer
- Order and Approve
- Unrestricted Order and Approve
- Trust Admin.

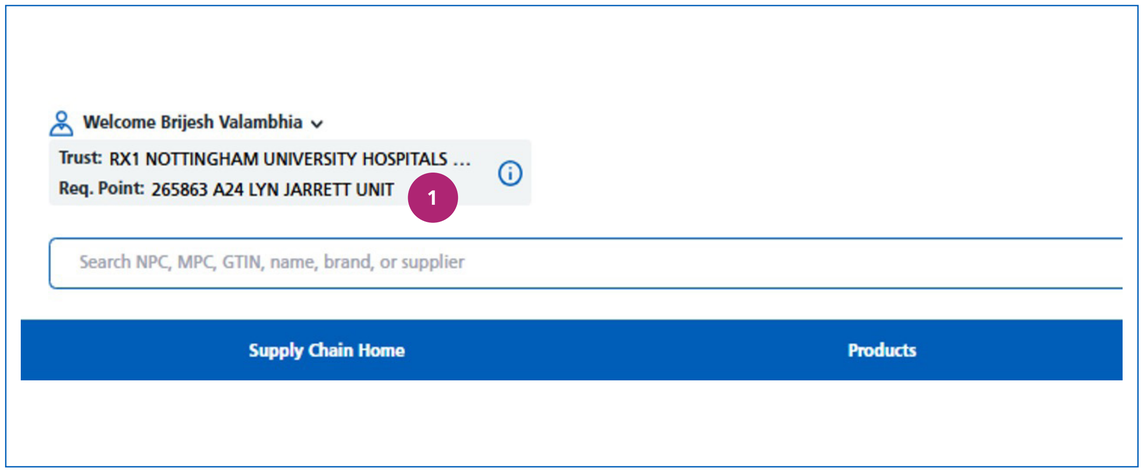
Users must also be associated to at least one Req. Point to be able to order.

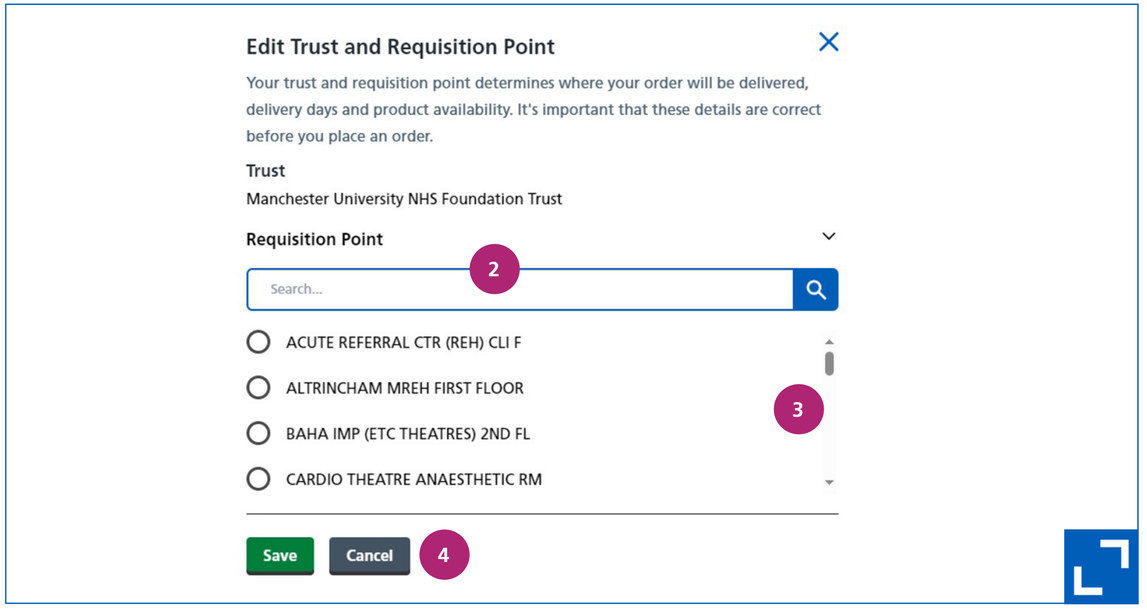
You can change the Req. Point you're ordering against by clicking on it underneath your name on the screen, when you are logged in.

You can search for a different Req. Point in the pop-up window or find it by scrolling down within this pop-up.

Inactive and on-hold Req. Points will not be visible.

All items in one order will go to the same Req. Point.





1. Change Req. Point by clicking on it (under your name).
2. Use the search bar to search for a new Req. Point.
3. Alternatively, use the scrolling bar to search for a Req. Point.
4. Click 'Save' to confirm your Req. Point.

Add to basket and checkout

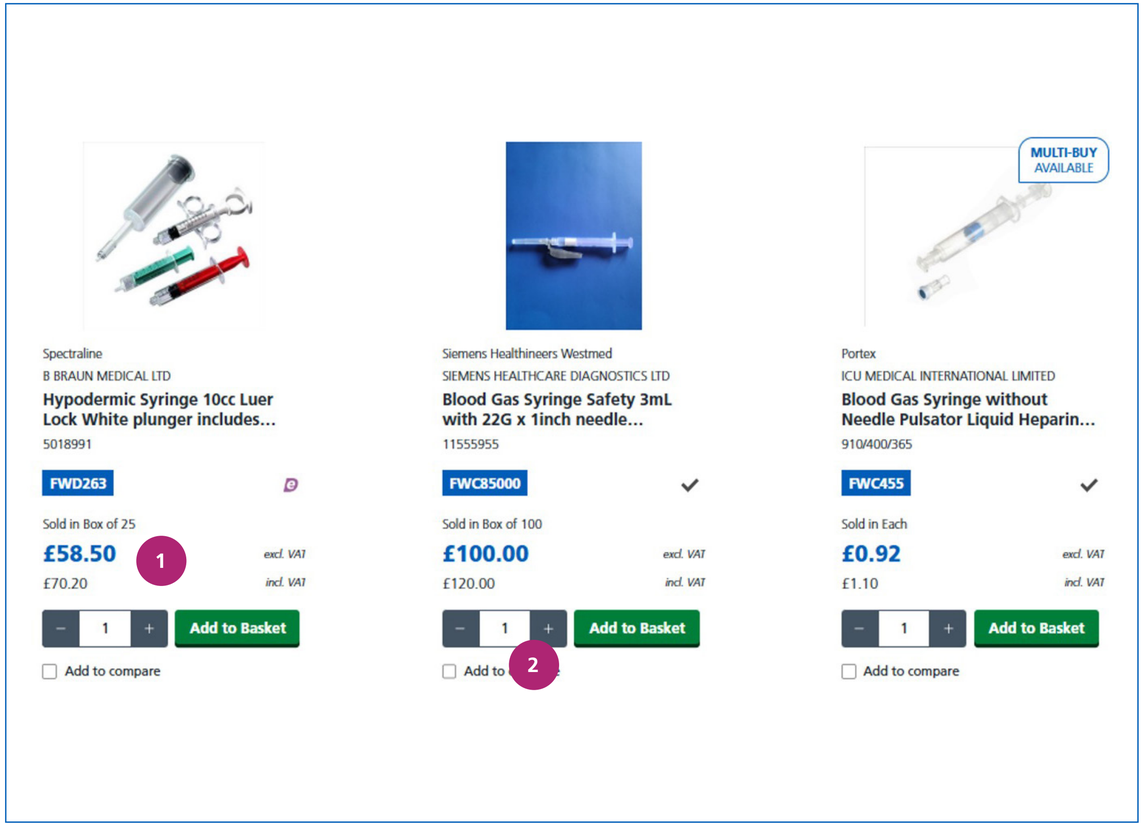
This section covers how to add to basket.

Prices will display with and without VAT included on the screen.

The unit of issue will also be shown, for example 'Sold in Box of 100'.

You can choose quantity before you click 'Add to Basket'.

Before proceeding to checkout, you can add multiple products to your basket.



1. Prices are displayed with and without VAT. Unit of issue is also shown here.
2. Choose quantity before you click 'Add to Basket'.

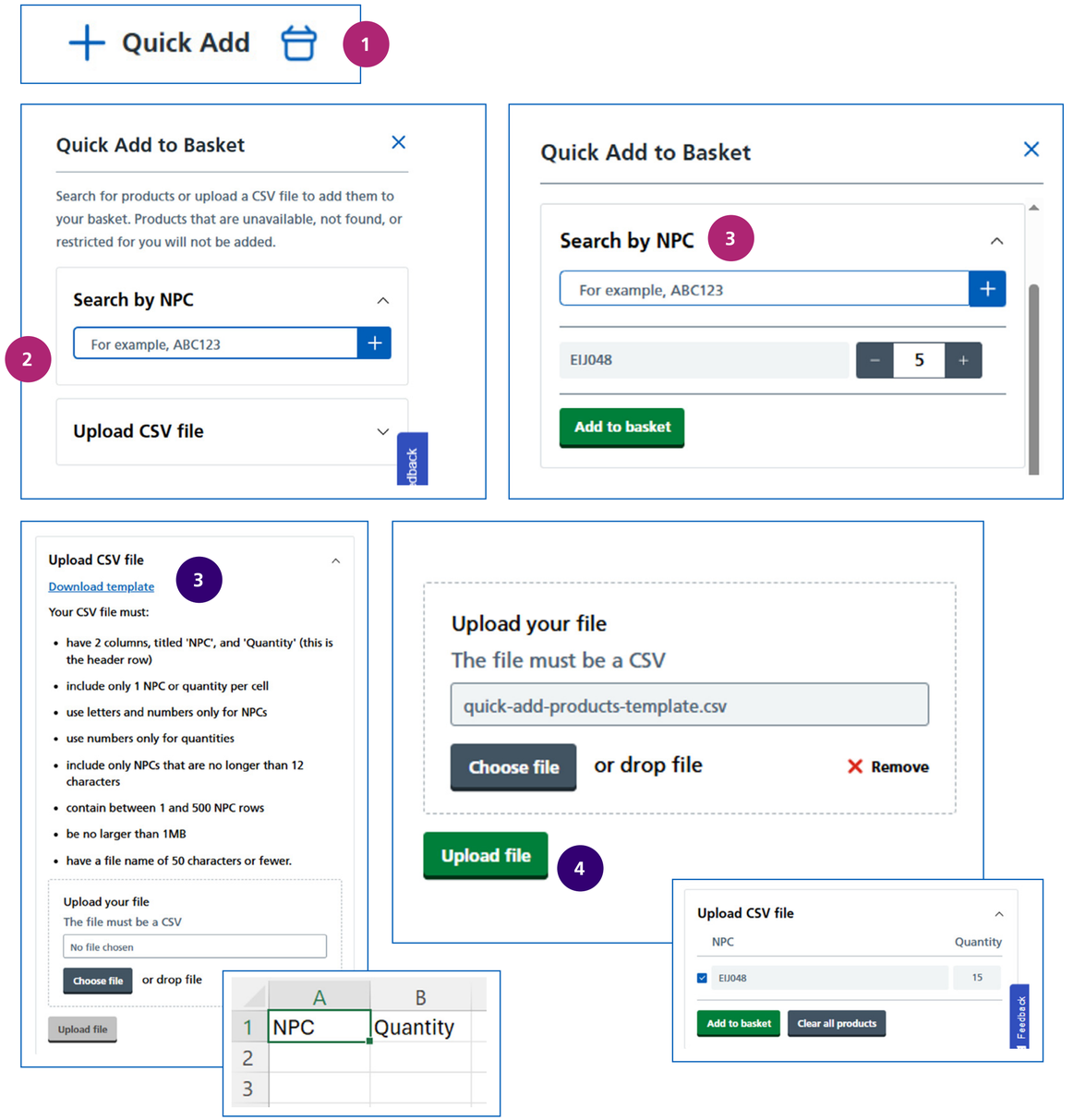
Quick add to basket and checkout

This guide shows you how to use the updated quick add feature to efficiently add products to your basket, either manually using NPC or in bulk via a CSV file.

You can access the quick add option next to the basket icon and choose the method that works best for you.

To add products manually, you can search by NPC. Select the required quantity and add items instantly, with confirmation shown on screen.

For bulk uploads, you can download or copy a CSV template. Follow the provided instructions and upload your completed file to add multiple products at once. After uploading, you'll be able to review your products and quantities, correct any issues and confirm to add everything to your basket.



1. The quick feature now sits on next to the basket icon. To quick add products, click on 'quick add' and select the relevant method.
2. You can add each product manually or bulk upload the products via a CSV file.
3. **This covers adding by NPC, to add by CSV file refer to step 3 marked in purple below.**

   Enter the product in the 'search by NPC', click the plus button and the product quantity selector will appear. Select correct quantity and click add to basket. Blue pop up will appear on the bottom right of the page when action is completed successfully.
3. **This covers adding by CSV, to add by NPC refer to step 3 marked in pink above.**

   Once you click the bulk upload, you can download the template or keep a copy stored locally. All the relevant instructions are listed on the upload part of the catalogue.
4. Once you have uploaded your chosen file you will be shown a list of your products and quantities. If they are correct, please select 'add to basket'. You can also deselect any products which are incorrectly uploaded.

Opening and viewing your shopping basket

This covers how to reach your shopping basket and the available functionalities within your basket.

Once you have added a product or multiple products to the basket, you will see a link to it near the top right hand corner of your screen.

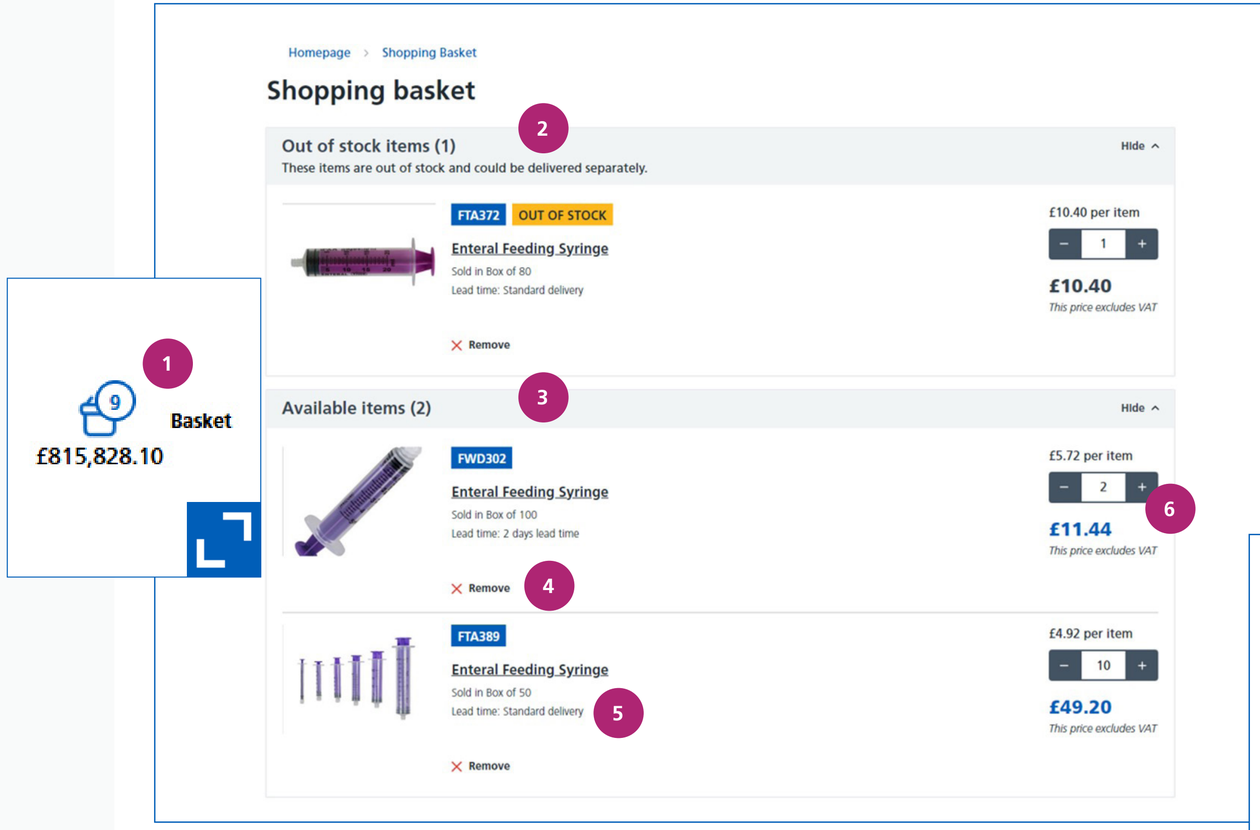
The number of products added and the total price is also shown, with details available (and adjustable) when you proceed to the Shopping Basket screen.

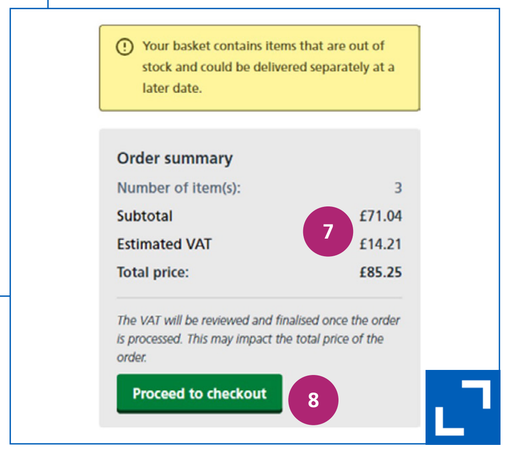
On the Shopping Basket screen:

- All products added so far will be shown.
- Quantities can be amended.
- Products can easily be removed.
- Lead times for delivery will be shown.

If any products are out of stock, this will clearly be shown, with a message to say they will be delivered separately.

The order summary shows VAT where relevant, and a button to proceed to checkout when you are ready.





1. Click the shopping basket icon to proceed to the Shopping Basket screen.
2. Out of stock items will be clearly shown.
3. You can view all available items in your order.
4. Remove unwanted items easily from this screen.
5. View lead times for delivery.
6. Amend quantities of each item.
7. VAT is visible in the summary.
8. Click the green 'Proceed to checkout' when you're ready.

Checkout

This section covers the process of checking out, and what to expect once your order is submitted.

Your order summary will display all of the details you might need to check, with confirmation of Req. Point, delivery days and a reminder that you can return to the Shopping Basket screen should changes need to be made: to return, click on 'Go back to Basket'.

Before you submit your order, you can add a local reference or some notes for delivery. Should you need a recap of the items from your basket, there is a drop-down option to view them.

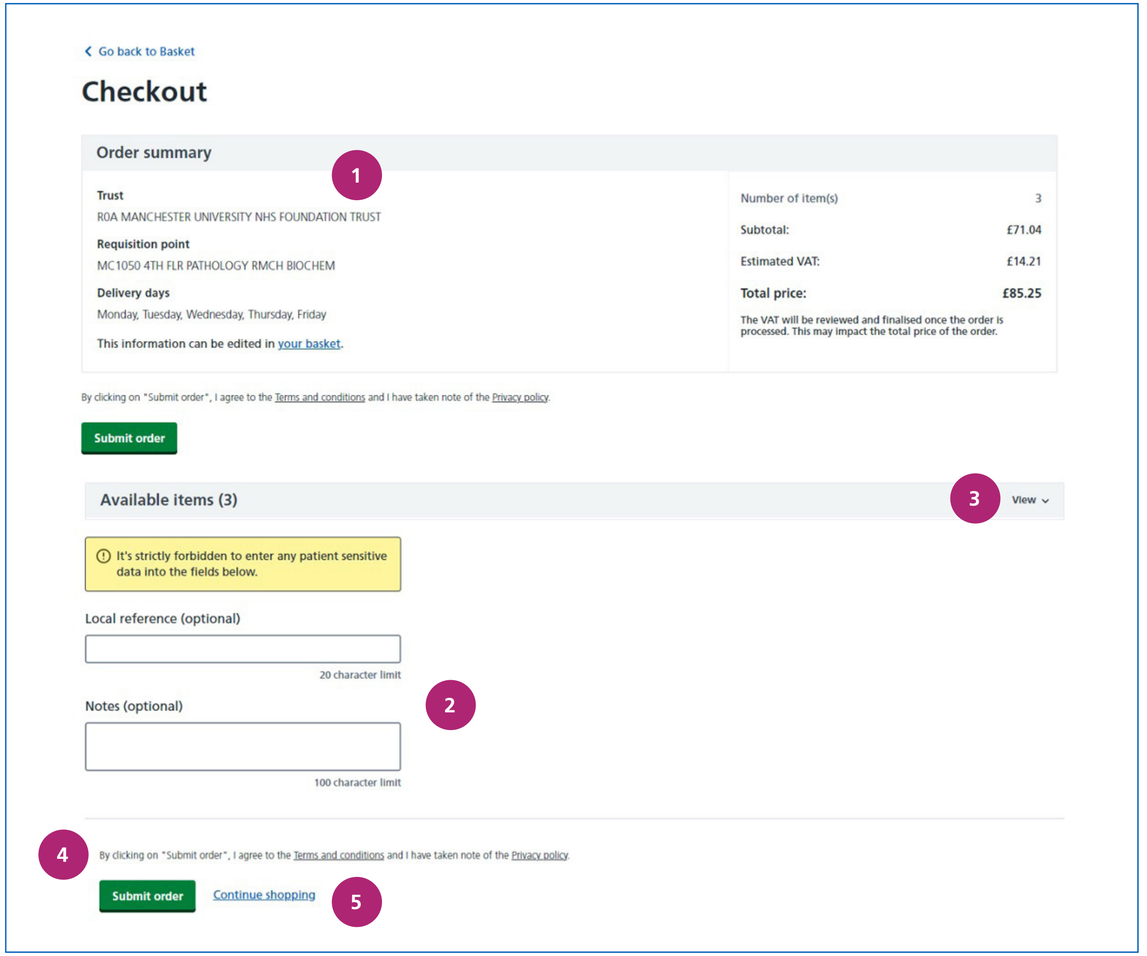
We also provide an option to 'Continue shopping' if you prefer, and items added to the order so far will remain saved in your basket if you do this.

A successfully submitted order will display a confirmation screen.

If your order total is within your financial limit, it will be processed straight away. If your order total is outside of your financial limit, it will be sent for further approval.

Tip

Don't worry if you get called away part way through placing your order, your items will still be in your basket next time you log in.



1. Check your order's details in the 'Order summary' section.
2. You can add a local reference or any delivery notes here.
3. Click the arrow for a recap of the items in your basket.
4. Click the green 'Submit order' to submit your order.
5. Click 'Continue shopping' to continue browsing. The items currently in your basket will remain saved.

Managing baskets (requisition points)

This section covers requisition points. You can create separate baskets for different organisations and requisition points, and switch between them without losing the products you've already added.

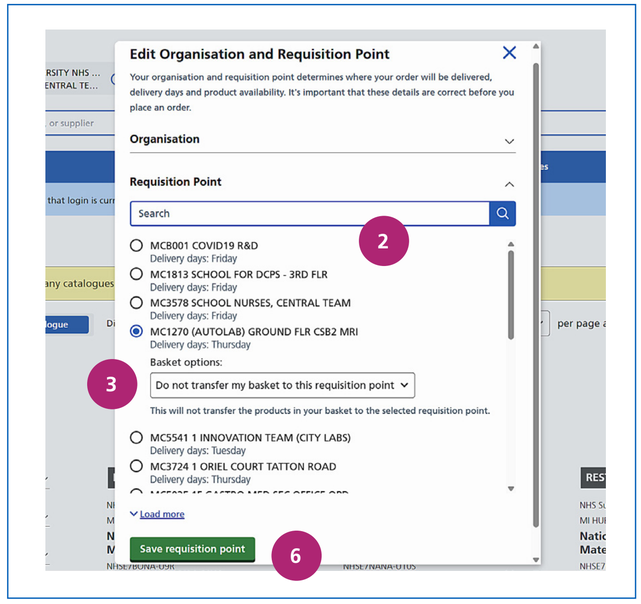
You can transfer products between baskets if the requisition points are in the same organisation.

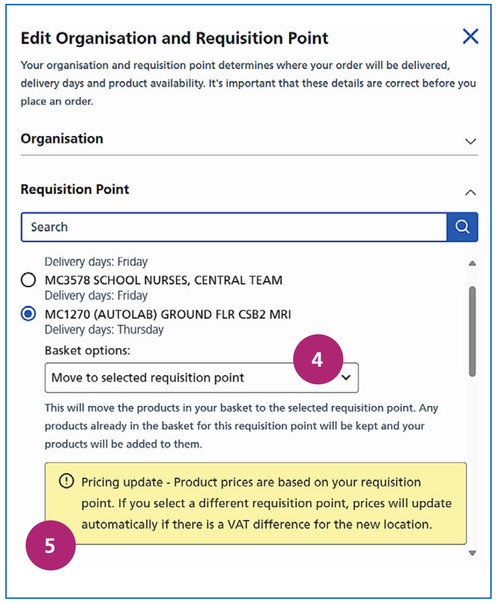
Once you've added products to your basket, select your current organisation in the top left corner of the page. Select a different requisition point and choose whether to keep your products in the original basket or move them to the new one. Any previously added products will remain in your basket when you switch, otherwise it will remain empty. Your products at the original requisition point will remain there.

If moved, any existing products in the new requistion point's basket will be combined, and prices will update automatically if VAT rates differ. Once you've made your choice, select 'Save requisition point'.

If you have access to multiple organisations, you can switch between them and manage separate baskets for each requisition point. Select the organisation and requisition point you want to use, then save your changes. You can view the selected basket using the basket icon and switch back to a previous basket at any time.







1. Select your current organisation in the top left of the page. This opens a box showing your organisation and available requisition points.
2. To change requisition points within the same organisation, choose the requisition point you want to use from the list.
3. Under Basket options, you'll see two choices. Choose 'Do not transfer my basket to this requisition point' if you want to keep your products at the original requisition point.
4. Alternatively, choose 'Move to selected requisition point to transfer all the products in your current basket to the new requisition point'.
5. Product prices will automatically update if there is a VAT difference for the new location.
6. Select 'Save requisition point'.

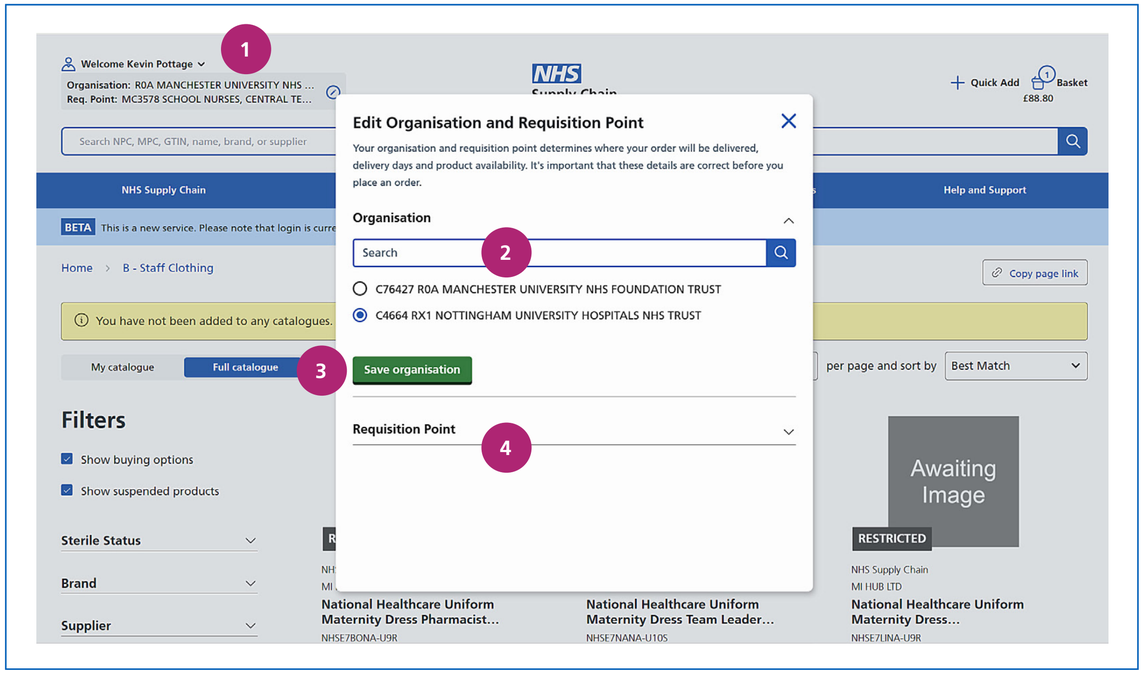
Managing baskets (organisations)

This section covers different organisations. You can create separate baskets for different organisations and requisition points, and switch between them without losing the products you've already added.

Select your current organisation from the top left of the page, then choose the organisation and requisition point you want to use, saving each selection when prompted.

Once confirmed, the basket icon in the top right will display the basket for your chosen requisition point, and a full product breakdown will be available at checkout.

You can switch back to a previous basket at any time by reselecting your organisation and choosing the original requisition point.





1. Select your current organisation in the top left corner of the page.
2. Open the organisation dropdown and choose the organisation you want to use.
3. Select 'Save organisation'. A confirmation message will appear. Select 'Yes, change organisation' to continue or 'Back' to cancel.
5. Choose the requisition point you want use and select 'Save requisition point'.
6. The basket icon in the top right corner gives you access to the basket for your selected requisition point. When you go to checkout, you'll see a full breakdown of the products in that basket. You can return to a previous basket whenever you need to by selecting your current organisation again and choosing the original requisition point.

Order overview

Find out more about viewing orders which need approval, or confirmed or pending orders.

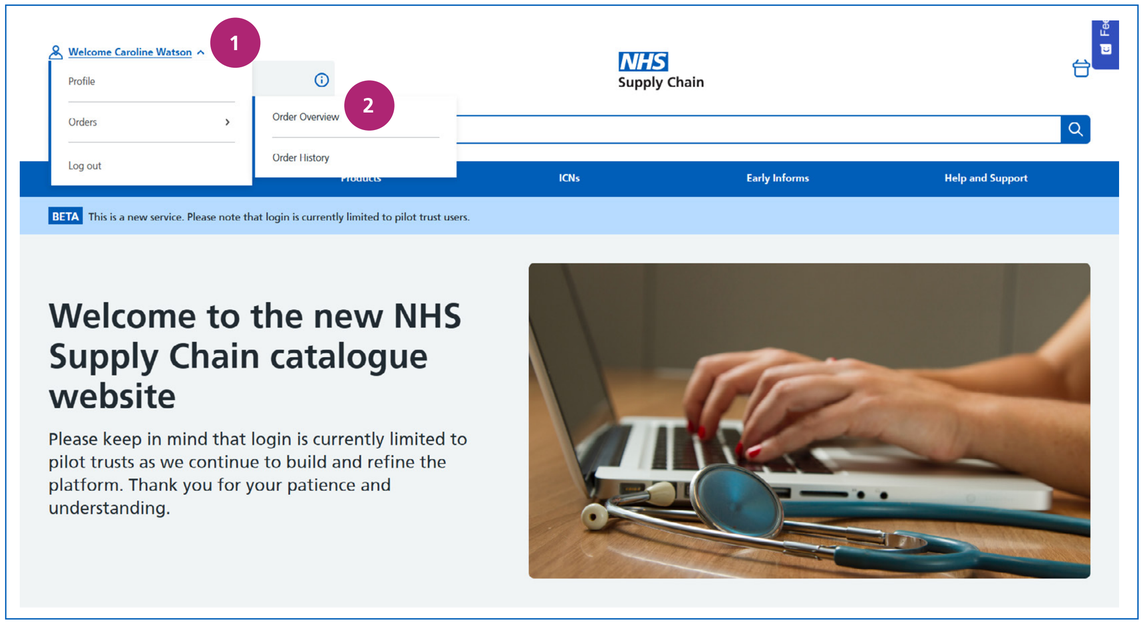
You'll need to log in to see Order Approvals. You can click on your name near the top left hand corner of the screen to see profile information, check your user role and any financial limits.

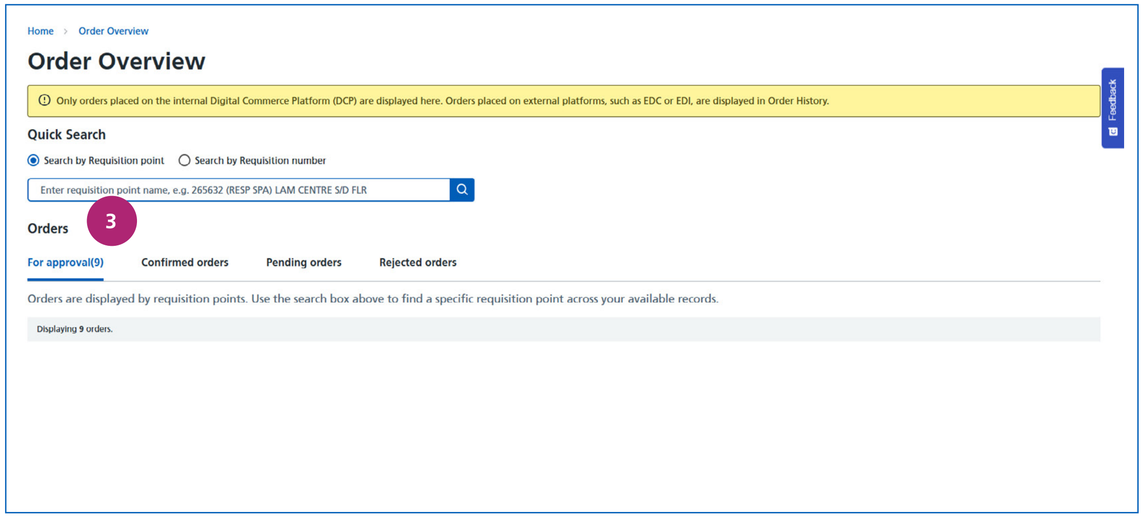
To be able to approve or reject orders, you will need to have one of the following roles:

- Order and Approve
- Order Approver
- Unrestricted Order and Approve
- Trust Admin.

Select 'Orders' to view the Order Overview screen.
Here, subject to your system role, you will find:

- **For approval** - all orders that are awaiting approval in your organisation.
- **Confirmed orders** - orders that have been approved by you or someone else.
- **Pending orders** - orders that you have made that are over your financial limit and are awaiting approval.
- **Rejected orders** - all rejected orders for your organisation.





1. You need to be logged in first. Click your name to open the dropdown menu.
2. Click the 'Orders' button, and then select the 'Order overview' option.
3. View orders for approval, confirmed or pending orders, or rejected orders.

Searching by requistion point

This section covers searching by the requisition point or requisition point number to approve or reject.

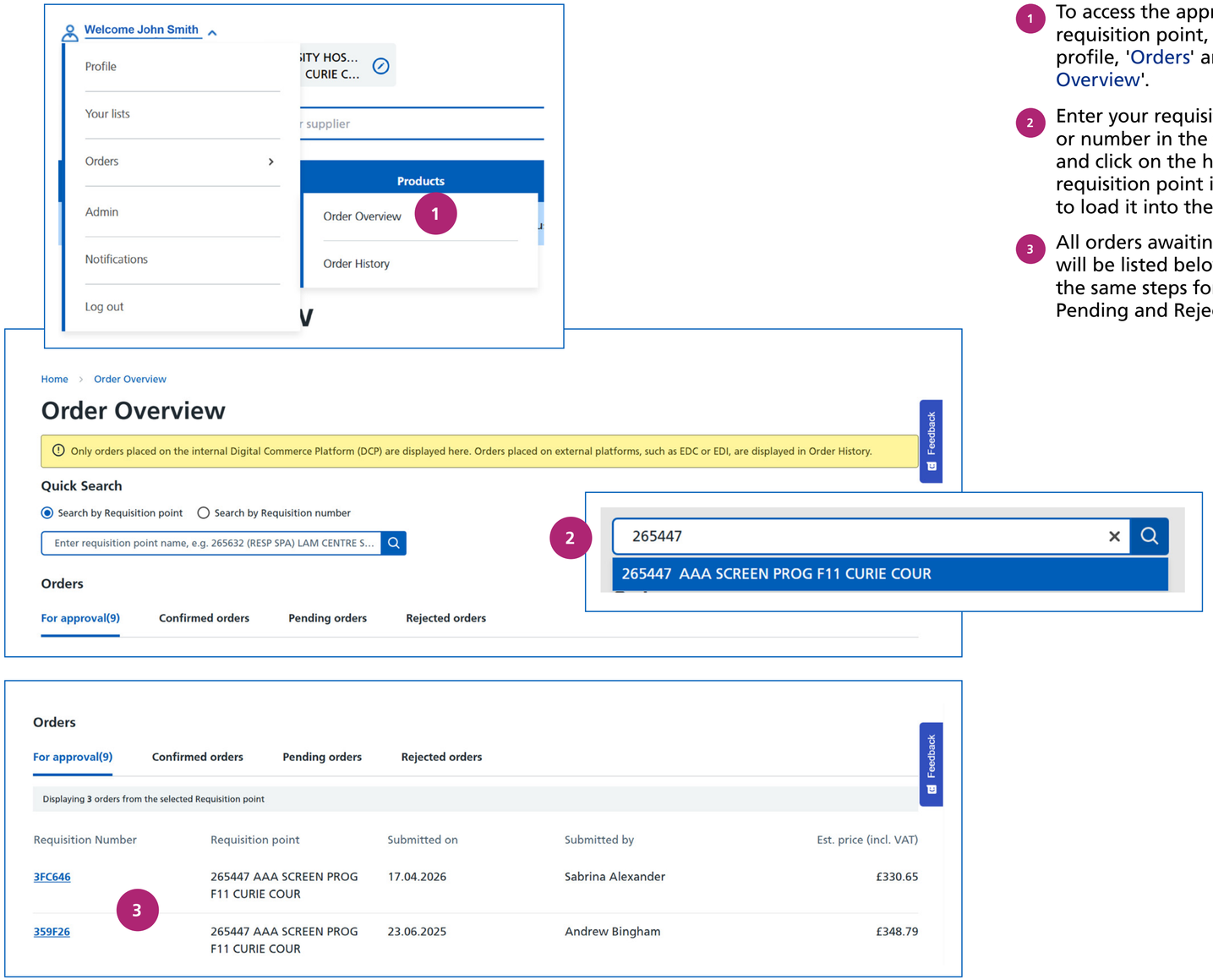
You can now search for requistion point or requisition number.

Enter your requistion point name or number into the search field. Once you start entering the relevant information, the requistion point will be displayed under the search field. You will need to select the correct requistion point to ensure it is populated in the search field.

Once the correct requistion point is loaded into the search field, you can then click on the search icon to filter to just that requistion point.

When searching confirmed, pending, or rejected orders, you will need to repeat the process of selecting the correct requistion point to ensure you filter to just that requistion point.

Your result will then be loaded under the relevant tab for you to action.



1. To access the approval by requisition point, click on your profile, 'Orders' and then 'Order Overview'.
2. Enter your requisition point or number in the search field and click on the highlighted requisition point information to load it into the search field.
3. All orders awaiting approval will be listed below. Follow the same steps for Confirmed, Pending and Rejected Orders.

Order approvals or rejections

This explains how to approve or reject an order from the order overview screen.

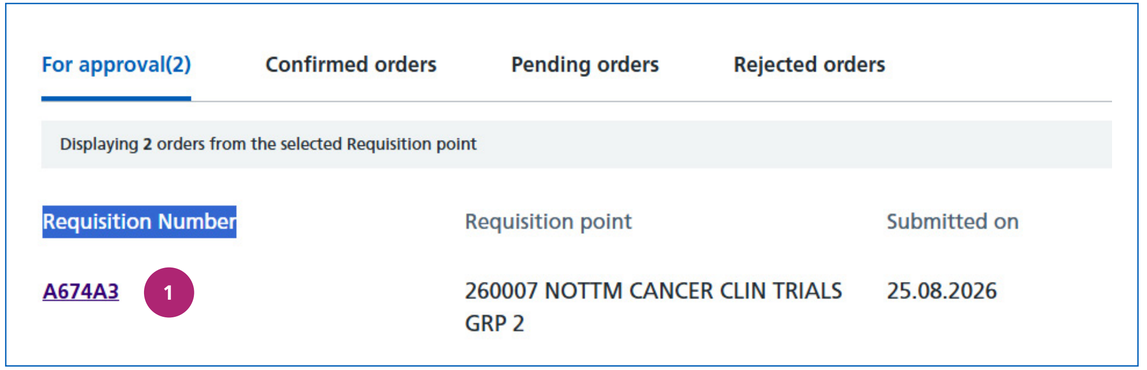
You can approve an order from the Order Overview screen by selecting it from the 'For approval' list (each order's Requisition Number is a link).

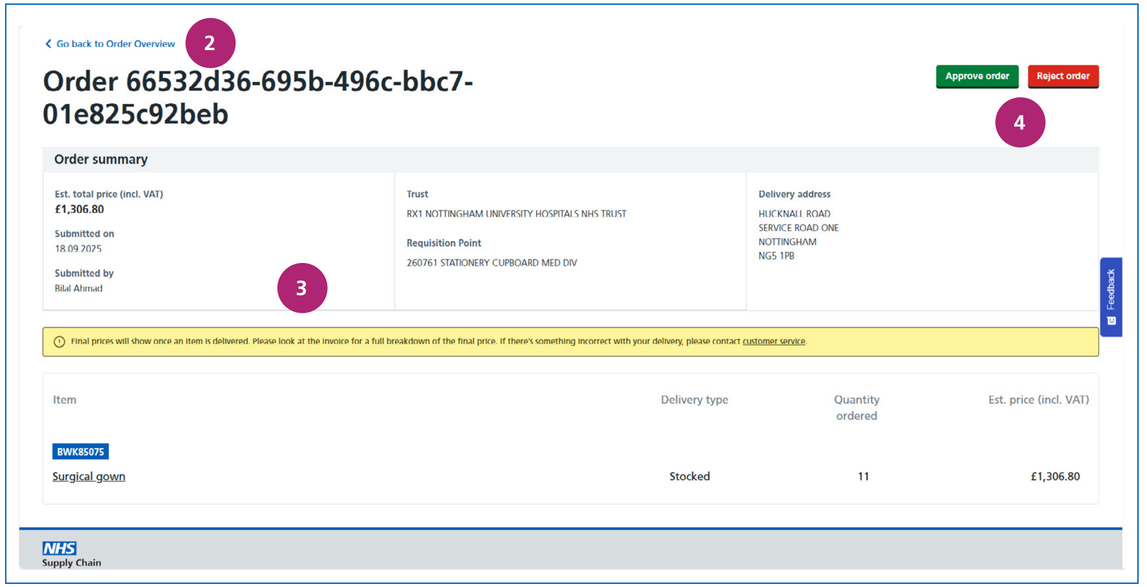
You can sort the list by the date the order was submitted or the person who submitted it by clicking on the arrows next to the column headings.

To search for an order, use the Quick Search function. Here, you will need to use the full Requisition Number, which is the long number that can be found on your approval needed email. It's also the same number you will see when you hover over the shortened Requisition Number number.

This long order number is only used on this Order Overview page. Once an order goes through to Order History, it will have a new order number in a similar format to the numbers you are used to from the old catalogue.

Once a Requisition Number link is selected, the order details will appear. Check the details, then use the green 'Approve order' button, the red 'Reject order' button, or return to the Order Overview screen.





1. Select an order from the Order Overview screen.
2. Click 'Go back to Order Overview' to return to the previous screen.
3. The details of this order are visible here.
4. Use the green 'Approve order' or red 'Reject order' buttons.

Important Information

Having two order numbers is a temporary technical solution with this new catalogue. As we continue to improve the system, this is an area we are looking to improve.

When an order is approved or rejected

When an order is approved:

You will be returned to the Order Overview screen after approving an order. A message displaying 'Order has been approved' will appear near the bottom right hand corner of the screen.

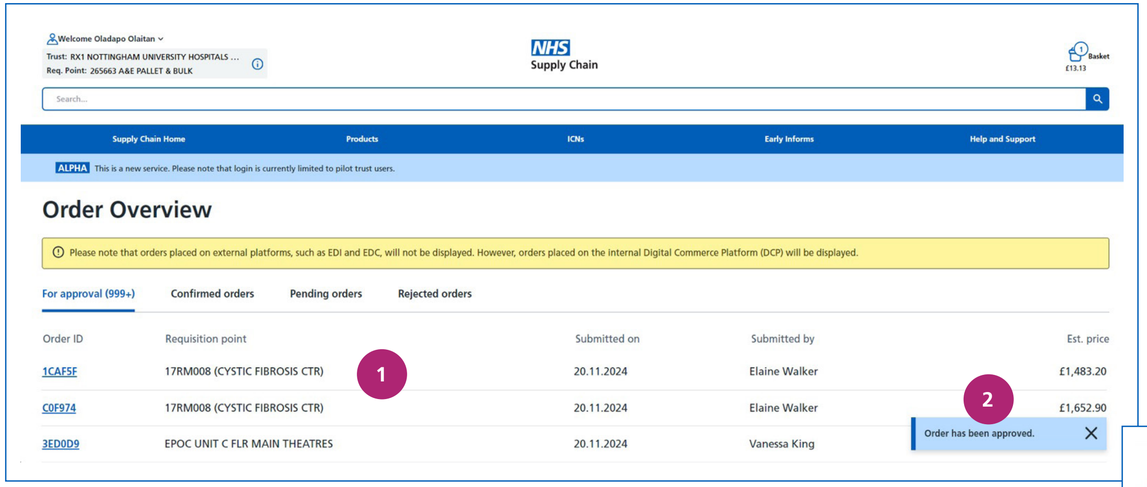
Instead of appearing in the 'For approval' list as before, it will now appear in the 'Confirmed orders' list. An email notification will be sent to the person placing the order to let them know that it has been approved.

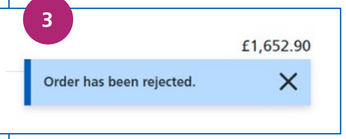
When an order is rejected:

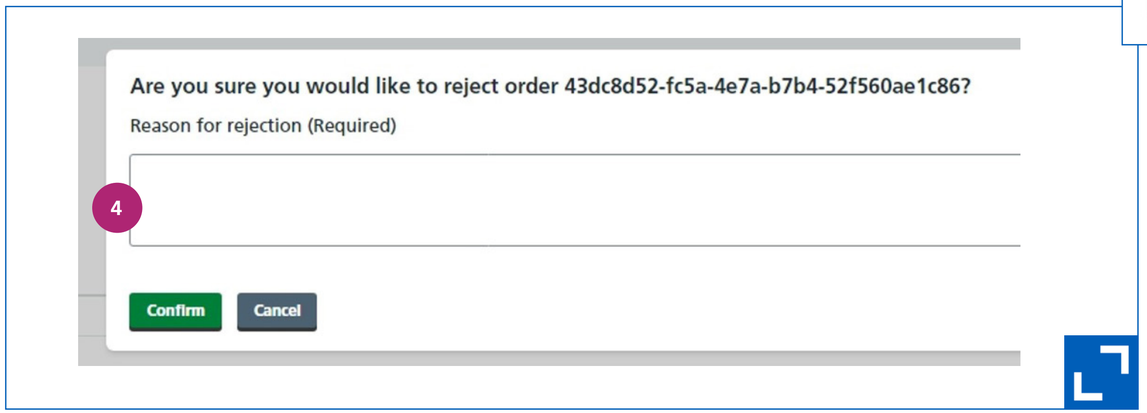
After rejecting an order you will see a pop-up screen where a reason for the rejection must be given and confirmed. An option to cancel the rejection is also included, in case of error on the previous screen. If you provide the reason and confirm the rejection, you will return to the Order Overview screen.

A message displaying 'Order has been rejected' will appear near the bottom right hand corner of the screen.

Instead of appearing in the 'For approval' list as before, it will now appear in the 'Rejected orders' list. The rejection reason will be added to the details on the 'Rejected orders' page. An email notification will be sent to the person placing the order advising them that it has been rejected.







1. Select an order from the 'Order Overview' screen.
2. After approving an order, a message displaying 'Order has been approved' will appear on the 'Order Overview' screen.
3. If an order is rejected, the message displayed will read 'Order has been rejected'.
4. If rejecting an order, a pop-up will request a reason for the rejection.

Order history

This section explains how to get to the 'Order History' page and how to use the search function to look for relevant orders.

You'll need to be logged in to view Order History and have one of the following roles:

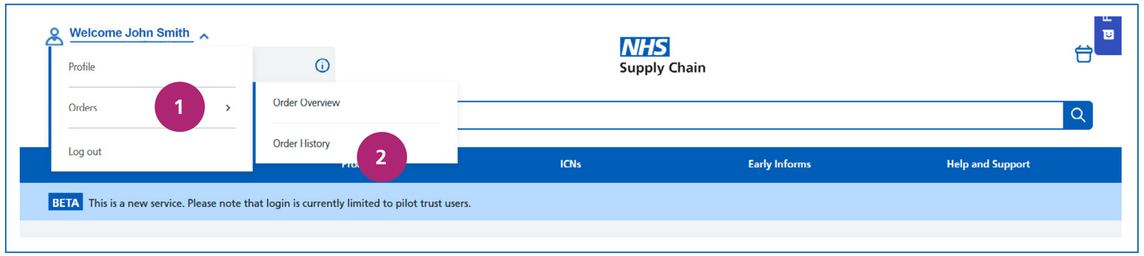
- Order Placer
- Unrestricted Order Placer
- Order and Approve
- Order Approver
- Unrestricted Order and Approve
- Trust Admin.

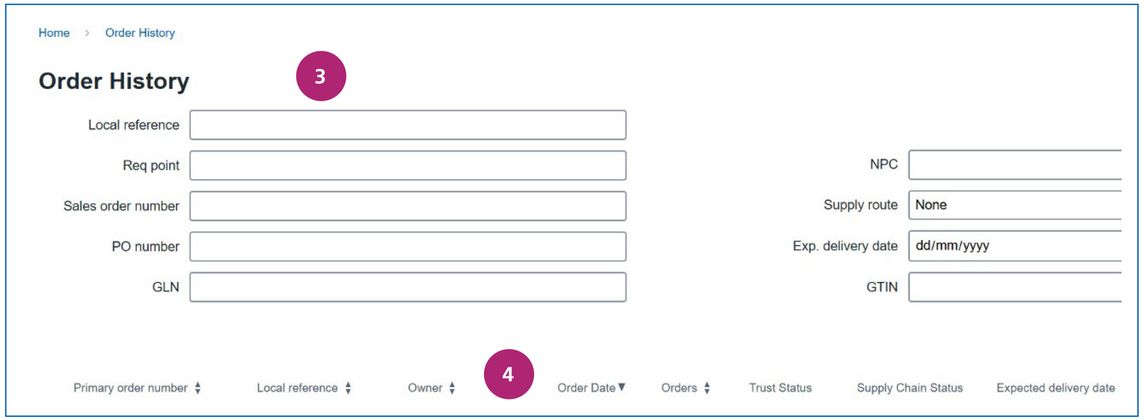
You can click on your name near the top left hand corner of the screen to see profile information, check your user role and any financial limits.

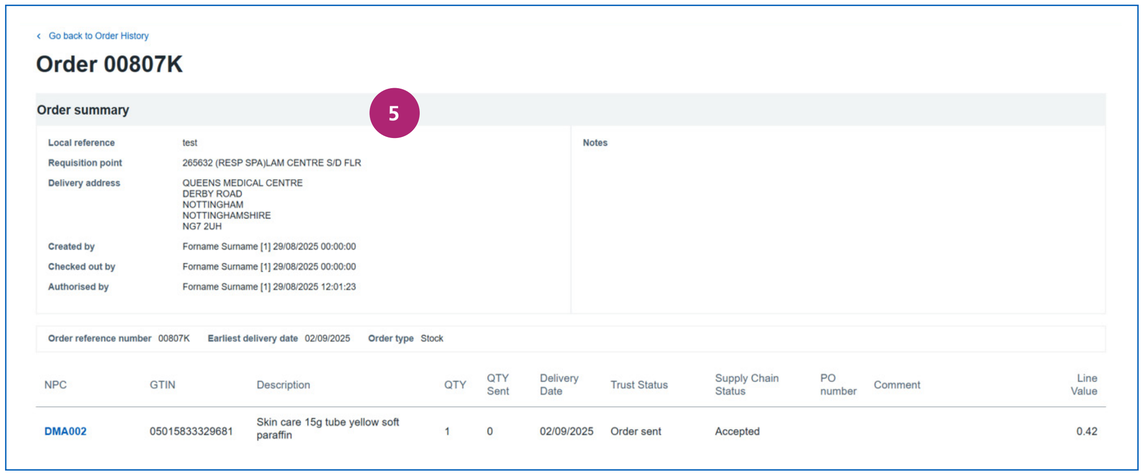
To display the Order History page, click on your name and select 'Orders' then 'Order History'. All NHS Supply Chain orders for your trust which have been confirmed will be shown at the bottom of this page. The Order number will be different to the one shown on the Order Overview page and will be the final number format used in all reporting moving forward.

Use the relevant search fields to search for any placed orders. Click on the order number to view details of the order.

Alternatively, you can sort the list of orders by clicking on the arrows by the column headings.







1. Click your name and then select 'Orders' from the list.
2. Click 'Order History' to navigate to the Order History page.
3. From here you can use the search fields to find any placed orders.
4. You can also use the arrows by the column headings to sort the list of orders.
5. Once you select an order, you will be taken to the individual order's summary page.

Before you begin / overview

This section covers how to access your tailored catalogue(s).

Tailored catalogues are built by adding specific, products and categories to a bespoke catalogue.

A maximum of five tailored catalogues can be created and users can be assigned to up to three tailored catalogues.

To be able to set up a tailored catalogue you must be logged in, and have one of these user roles:

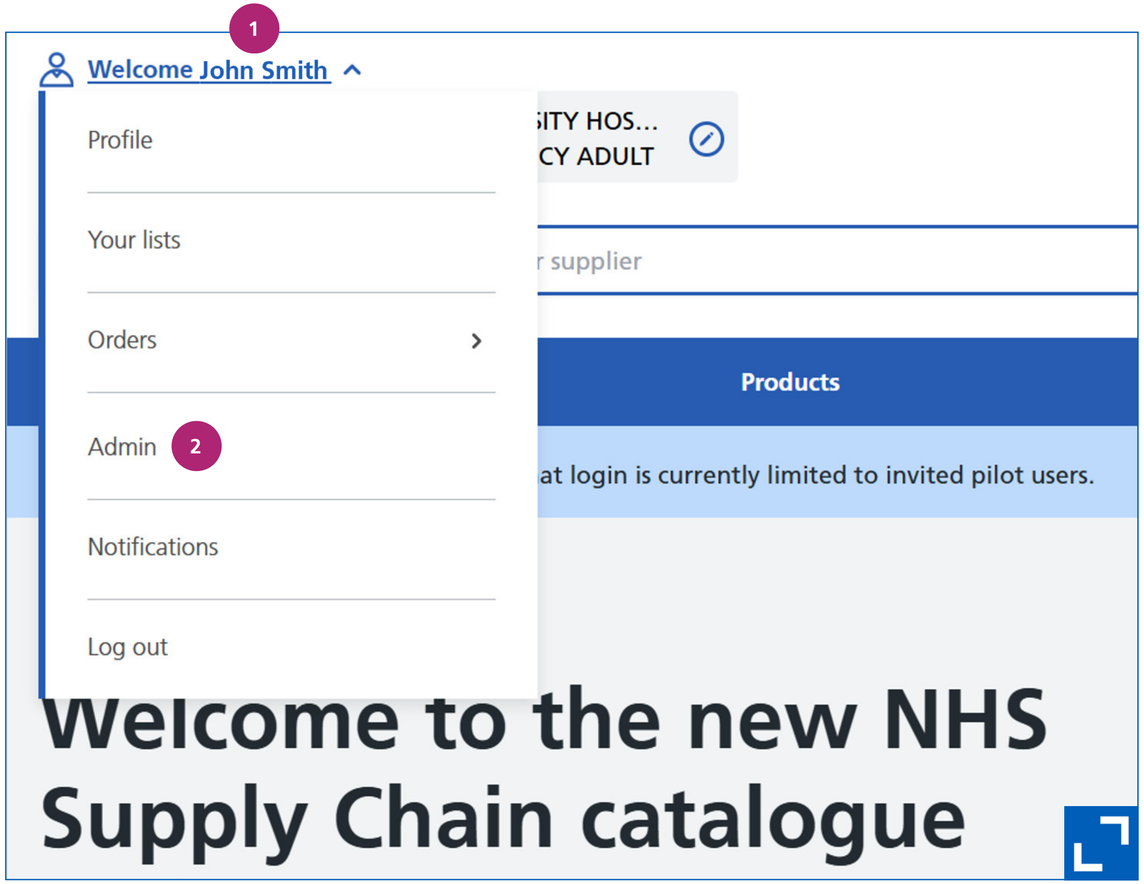
- Admin
- Catalogue Manager.

Once logged in, you can click on your name near the top left-hand corner of the screen to see profile information, check your system role and any financial limits.

Select 'Admin' to go to the Tailored Catalogues screen.

Upload times have now changed

The upload time for creating or updating a catalogue is up to 30 minutes.



1. Click your name at the top left-hand corner of the page.
2. Select 'Admin' to go to the 'Tailored Catalogues' screen.

Creating your tailored catalogue

From here, you can create tailored catalogues.

On the 'Admin' page you can see how many tailored catalogues have already been created.

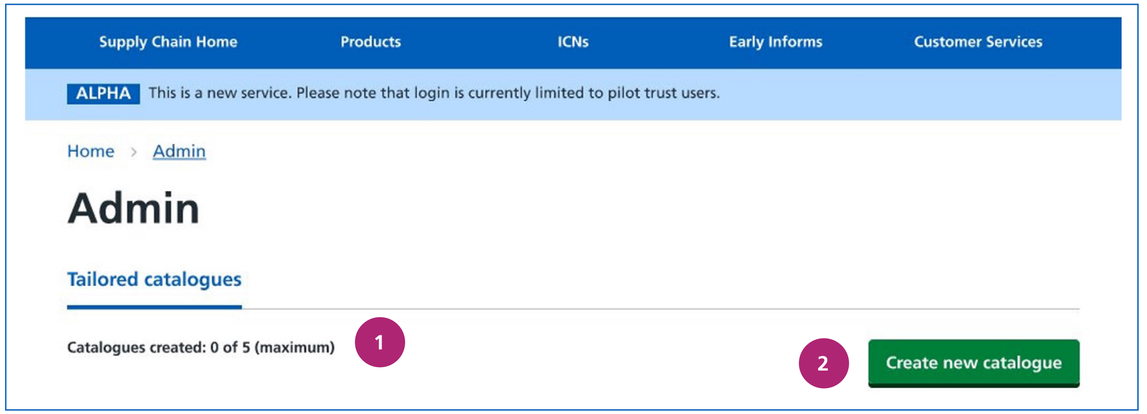
Click the green 'Create new catalogue' button to set up a new tailored catalogue.

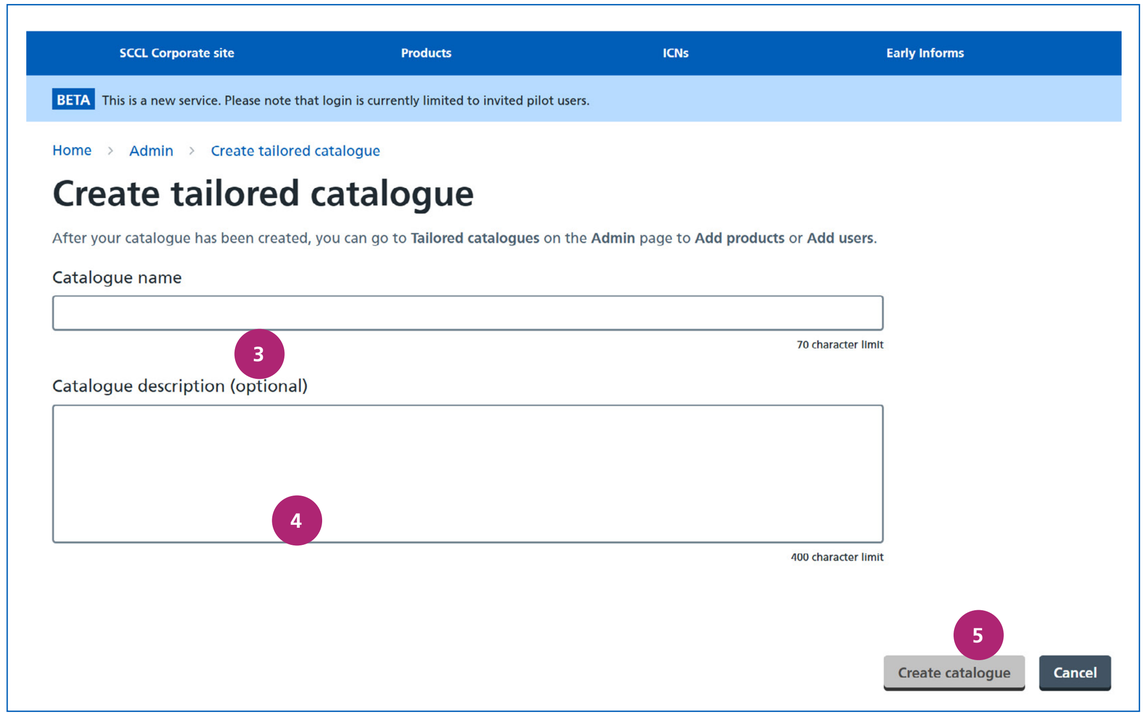
You'll then be taken to the 'Create tailored catalogue' screen.

Enter a catalogue name (minimum of 2 and maximum of 70 characters including spaces). Only alphanumeric characters and ", _ - ( ) . " are allowed.

Adding a catalogue description is optional, but we advise that you use the description to say who the catalogue is aimed towards.

A popup window will ask you if you're sure you want to create this catalogue. You can click 'yes, create catalogue' or 'continue editing' to go back.





1. You can see how many tailored catalogues have been created.
2. Click the green 'Create new catalogue' button to create a new tailored catalogue.
3. Enter a catalogue name between 2–70 characters.
4. You can add a description for your catalogue.
5. Click the 'create catalogue' button to continue.

Adding products to your tailored catalogue (1/3)

To add products to your Tailored Catalogue, on the admin page, scroll to the catalogue to which you would like to add products. There are two ways to add products to your catalogue, either by manually adding products or bulk uploading via a CSV file.

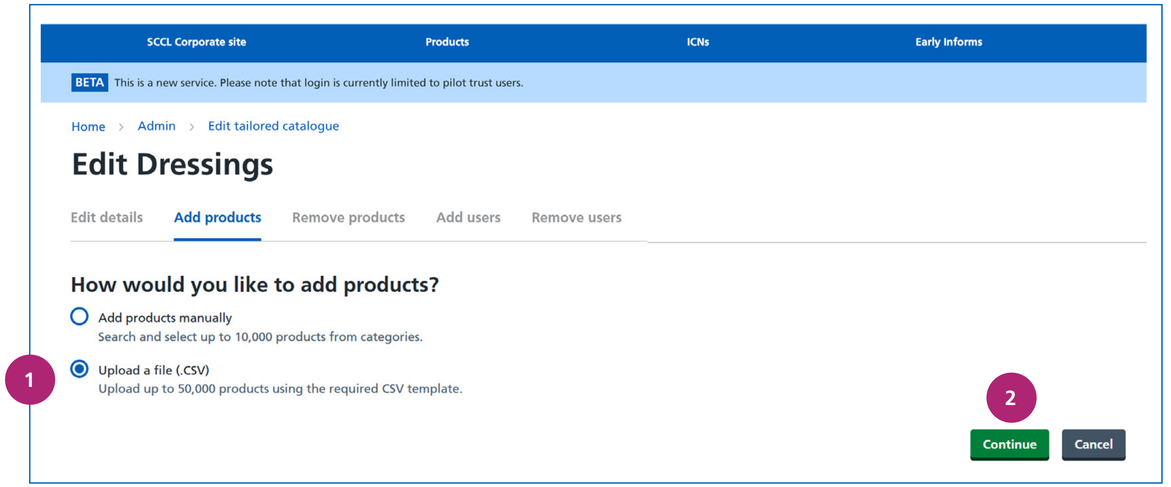
This page shows you how to upload products via CSV. If you prefer to upload your products manually, please skip to page 24.

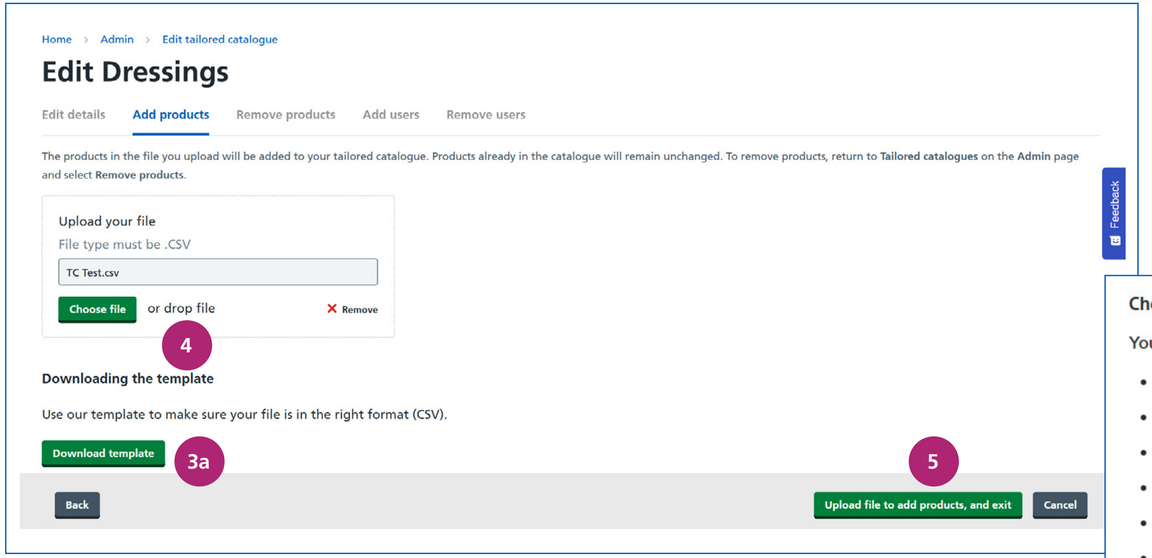
To upload via a CSV, select the CSV option and select 'Continue'.

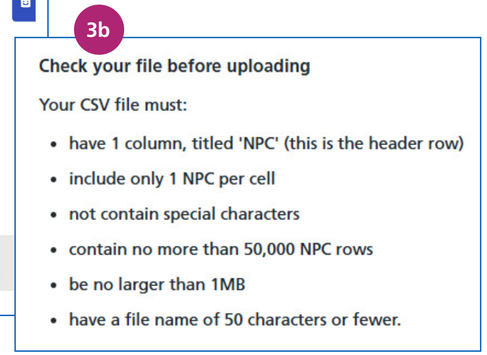
Download the template and populate it **following the guidance** on the page. Remember to save the file as a .CSV document. You can upload up to 50,000 products at a time using the upload method. You can then either drop your file into the grey bordered area or 'Choose file' to upload it from your device.

Once you have successfully selected the file, the file name will appear in the file location box. If you need to remove or replace the file, you can easily do this by clicking on the remove option.

Now click on the 'Upload file to add products, and exit' button.







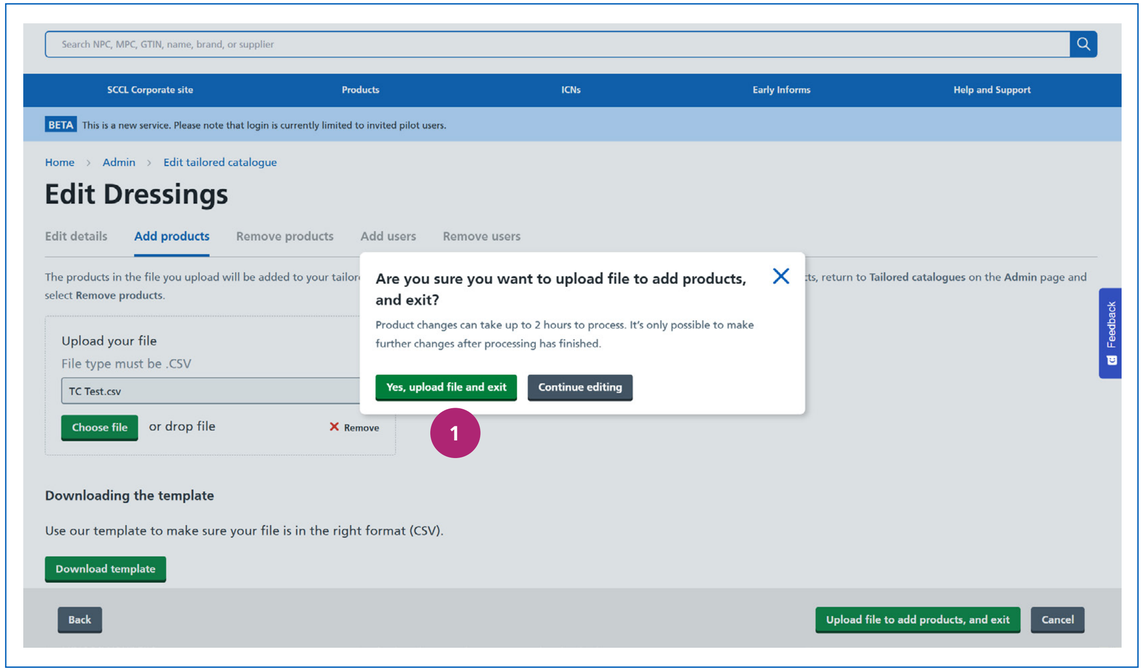
1. Select 'Upload a file (CSV)' to proceed with the CSV option.
2. Click the 'Continue' button to begin.
3a. Click the 'Download template' button and populate the document **following the guidance** on the page.
3b. Scroll down the page to view the CSV guidance.
4. Upload your CSV file by selecting 'Choose file' or dropping your file into the grey bordered area.
5. One you have uploaded the file, the file name will appear in the file location box. Proceed by selecting the 'Upload file to add products, and exit'.

Adding products to your tailored catalogue (2/3)

This section covers how to complete your bulk upload by CSV file.

A pop up box will appear to confirm your upload, click 'Yes, upload file and exit' to complete your bulk upload. You will then be returned to the Main Tailored Catalogue page.

It will take up to 30 minutes to complete the upload. Please log out and log back in again to see the products added to your tailored catalogue.



1 Click 'Yes, upload file and exit' to complete your bulk upload, or select 'Continue editing' to return to the upload CSV page.

Adding products to your tailored catalogue (3/3)

This page covers how to add products manually, rather than by CSV File.

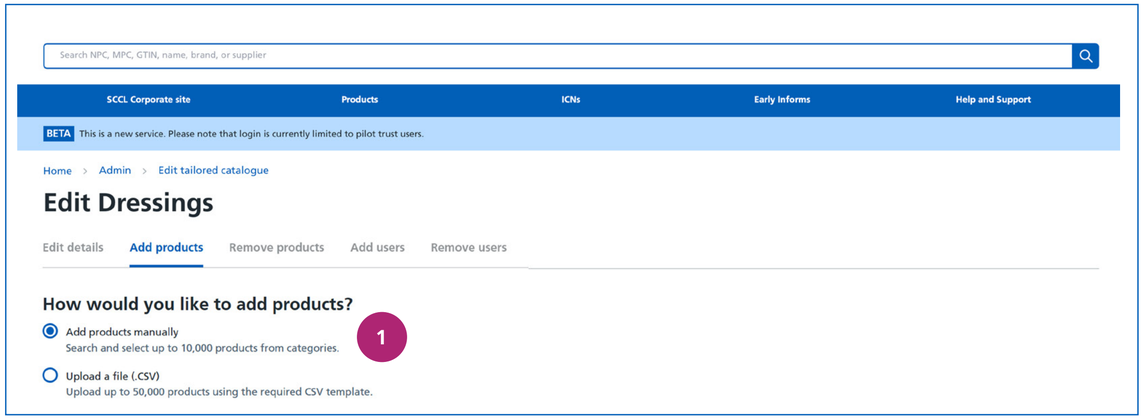
Search for products by NPC, GTIN, name (input full NPC and GTIN codes), or filter products using the filter options.

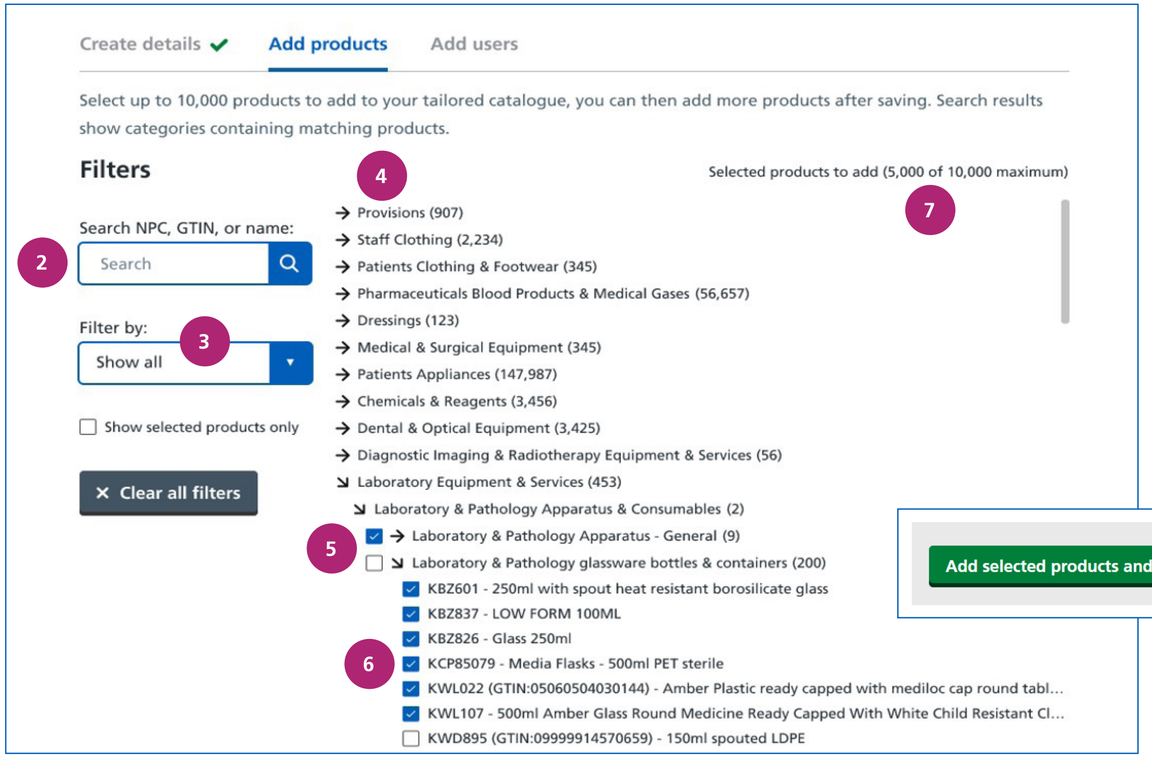
Products will be listed in eClass order. Select the arrow next to the eClass category to expand it and view the subcategories and the individual products that sit within them. When you get down to the third level in the category, you can either add all the products within that level or just choose individual products. To add all the products within the category tick the box next to the category name. To only add certain products, tick the box against each individual product. You cannot select the whole category and then remove singular products from it.

You can upload a maximum of 10,000 products at a time. The total number of products selected is shown above the list of eClass categories.

Click the green 'Add selected products and exit' button to finish uploading products. It will then take up to 30 minutes for the request to process. Please log out and back in again during this time to process the changes.

While the upload is in progress, the add / remove products buttons will be greyed out for a short time. While they are greyed out, you will be unable to make any further changes.





1. Select 'Add products manually' from the Add products tab.
2. You can search by NPC, GTIN, or name.
3. You can also use the filter options to search.
4. Products are listed in eClass order. Use the arrows to expand and view subcategories and individual products.
5. Once you get to the third level in the category, you can add all products in that level or choose individual products. To add all products in that category, tick the box next to the category name.
6. To add individual products, tick the box next to the individual product name.
7. The total number of selected products is shown above the list.
8. To proceed with your selection, click 'Yes, add selected products and exit'. It will then take up to 30 minutes for the request to process. Please log out and back in again during this time to process the changes.

Removing products (1/2)

For adding products, please see page 22.
This page covers removing products. You can't add and remove products at the same time.

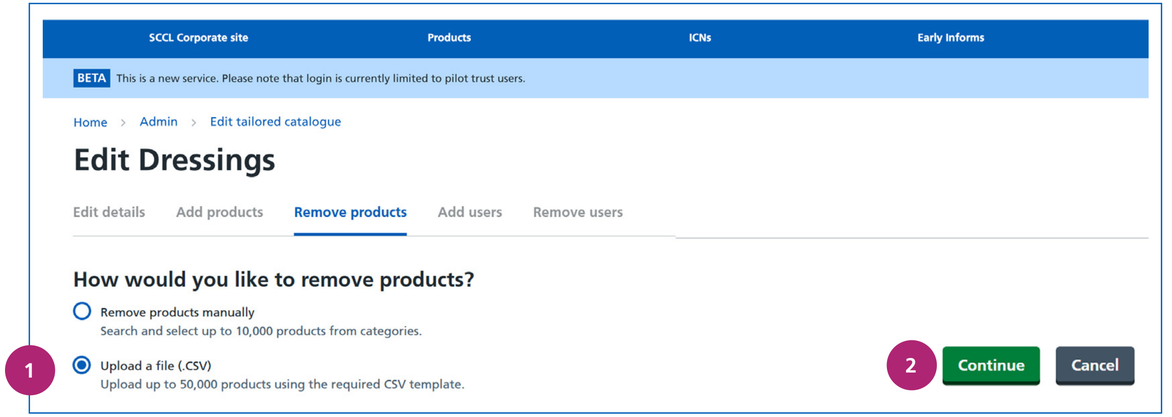
To remove products from your Tailored Catalogue, on the admin page, scroll to the catalogue from which you would like to remove products, then click 'Remove products'. There are two ways to remove products from your catalogue, either by manually removing products or bulk uploading via a CSV file. To upload via a CSV, select the 'CSV' option and select 'Continue'.

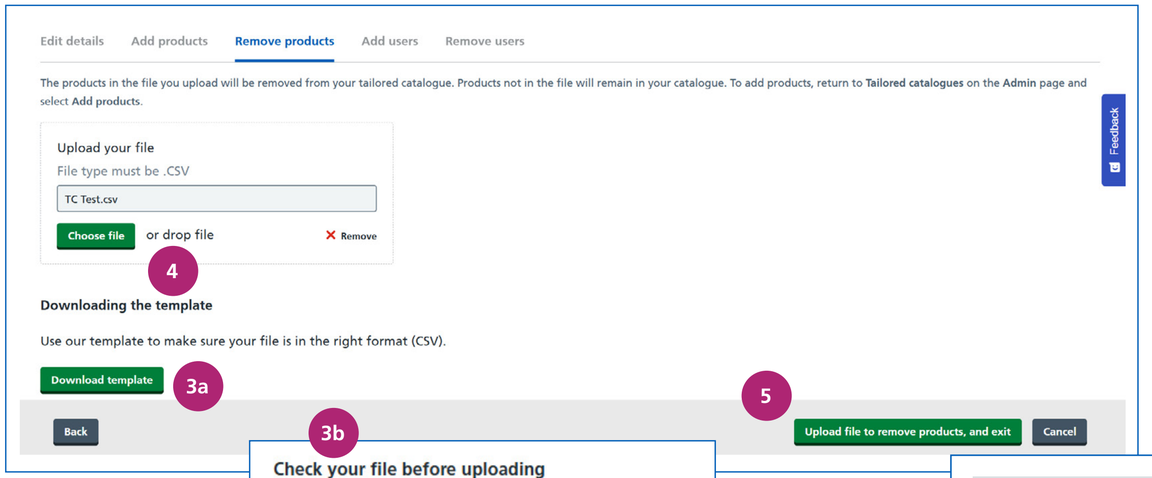
This page is for removing products by CSV file. For manually removing products, please skip to page 25.

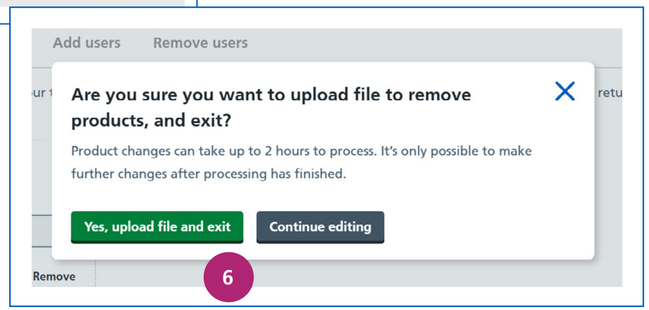
First, download the template and populate it with the NPCs of the products to be removed. **Follow the guidance** on the page and save the file as a .CSV document. You can then drop your file into the grey bordered area or 'Choose File' to upload it from your device.

Once you have successfully selected the file, the file name will appear in the file location box. If you need to remove or replace the file, you can easily do this by clicking on the remove option. Now click on the 'Upload file to remove products, and exit' button.

A pop up box will appear to confirm your upload, click 'Yes, upload file and exit' to complete your bulk upload. This will remove all products that you have included on the list that you have uploaded.







1. Select 'Upload a file (CSV)' to begin.
2. Click 'Continue' to proceed to the next step.
3a. Download the template and populate with the NPCs of the products you are removing from your Tailored Catalogue.
3b. Scroll down the page to **view the CSV guidance.**
4. Upload the file by clicking 'Choose file' or dropping it into the grey bordered area.
5. Click 'Upload file to remove products, and exit' to proceed.
6. Confirm your upload by clicking 'Yes, upload file and exit' in the pop up box.

Removing products (2/2)

This section covers how you can remove products from your Tailored Catalogue manually.

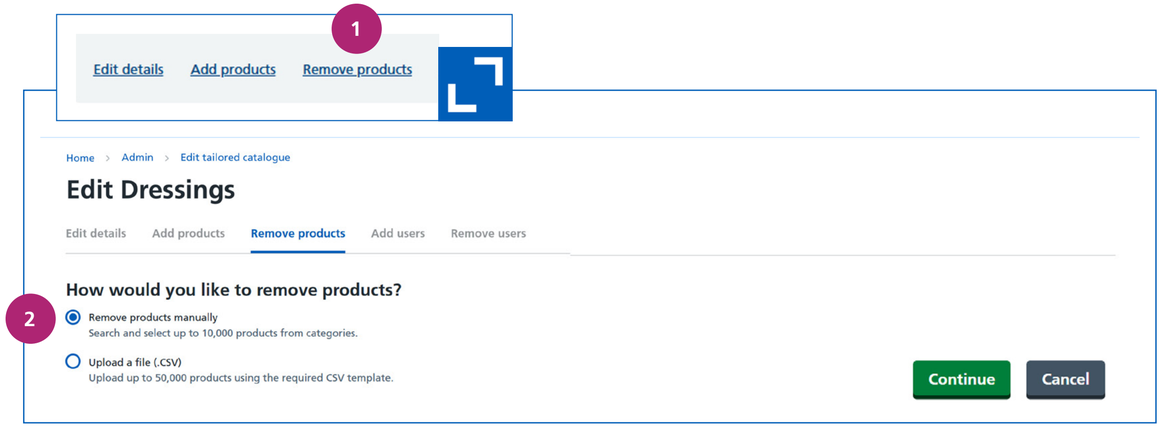
To remove products from your Tailored Catalogue, on the admin page, scroll to the catalogue from which you would like to remove products, then click 'Remove products'.

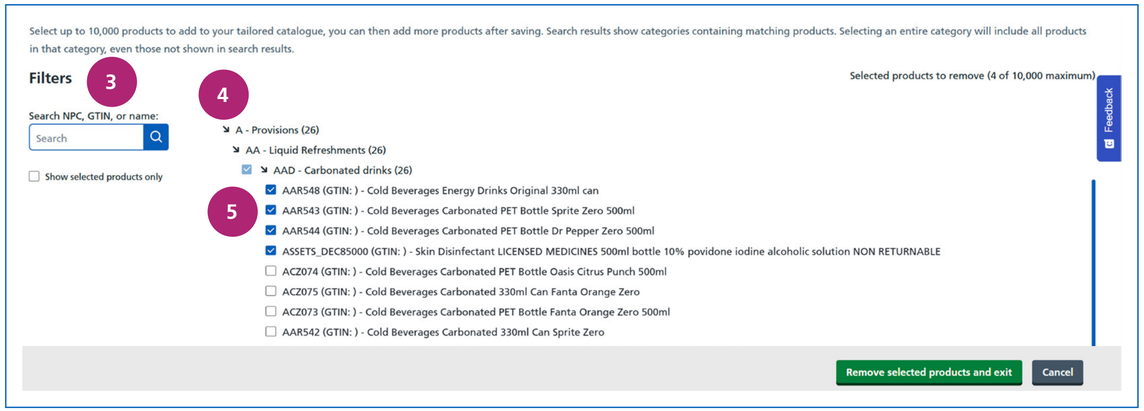
To remove products individually, first search for them by name, NPC or GTIN. Products will be listed in eClass order. Select the arrow next to the eClass category to expand it and view the subcategories and the individual products that sit within them.

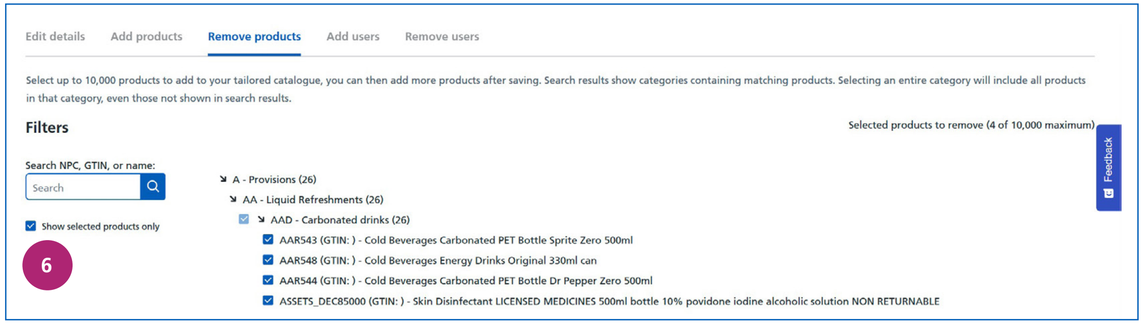
When you get down to the third level in the category, you can either select all the products within that level or just choose individual products to remove.

- To remove all the products within the category tick the box next to the category name.
- To only remove certain products, tick the box against each individual product. You cannot select the whole category and then untick singular products that you do not want to remove.

Once you've selected the products to remove (minimum one product), click 'Yes, remove selected products and exit'. It will then take up to 30 minutes for the request to process. Please log out and back in again during this time to process the changes.







1. Click the 'Remove products' on the Admin page.
2. Select 'Remove products manually'.
3. Search for products by name, NPC, or GTIN.
4. Use the arrows next to the eClass category to expand it to view subcategories and individual products within.
5. Once you reach the third level in the category, you can either select all products within that level or an individual product to remove.
6. Tick 'Show selected products only' to show the eClass categories that contain products as part of your search results and are also in your catalogue.

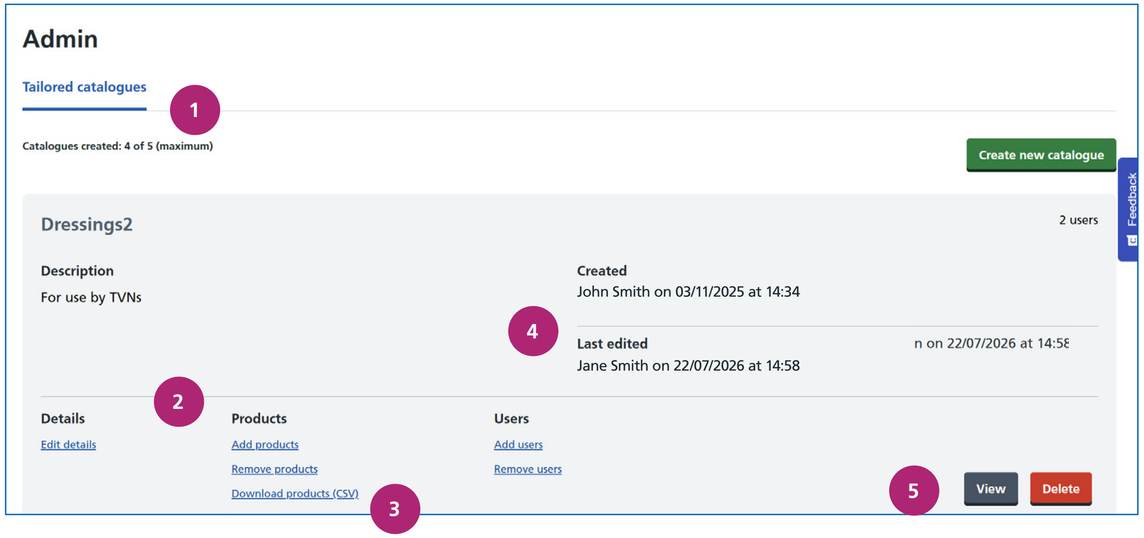
Overview of the tailored catalogue

You can now edit your tailored catalogue.

Once your tailored catalogue has been created you are able to:

- Edit the name and description.
- Add or remove products.
- Assign users to or remove them.
- View existing products within the specific tailored catalogue.
- Delete the entire tailored catalogue.
- Download products to view all of the products that are in the tailored catalogue and their details.

Access your tailored catalogue from the 'Admin' screen.
You can also see who created and last edited it from here.



1. View your tailored catalogues from the 'Admin' page.
2. Use the links at the bottom to 'Edit details', 'Add products', 'Remove products', 'Add users' or 'Remove users'.
3. Download the products that are in your tailored catalogue using the 'Download products' button.
4. You can see who created the catalogue, along with the date and user for the most recent edits.
5. Use the 'View' button to view the products within the catalogue. You can delete the catalogue with the red 'Delete' button.

Adding users (1/2)

This section covers how to add users to a tailored catalogue manually.

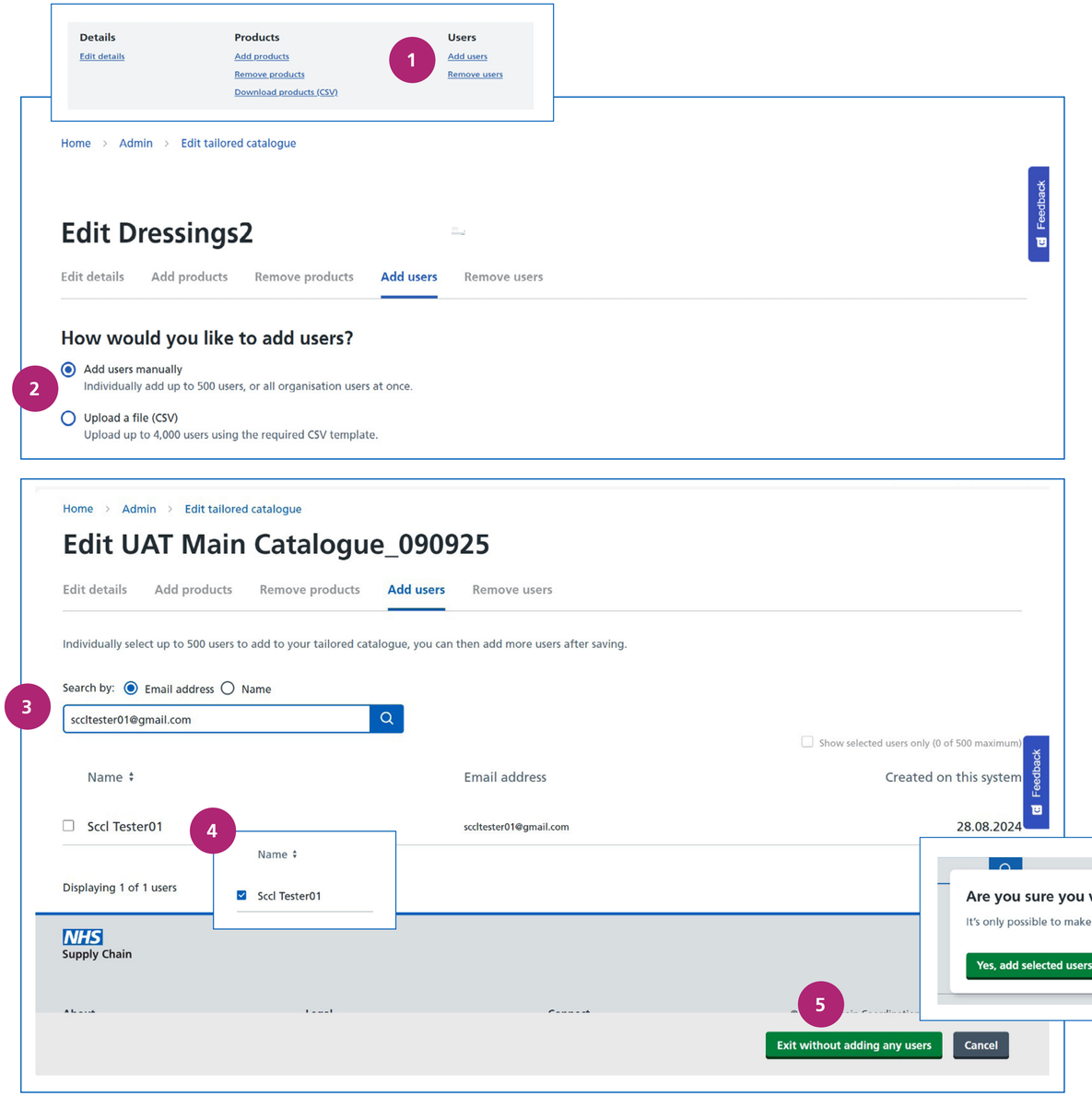
You can add users from the Admin screen by clicking 'Add users' for the relevant catalogue.

You can then select how you would like to add users, either manually or by uploading a file.

If you select to do it manually, this will display a list of all the catalogue users Search for users by their name or email address. Tick the checkbox against the user(s) you wish to add from the list of users displayed.

Once you've selected the user(s) to add, a green 'Add selected users and exit' button will appear (in place of the 'Exit without adding any users' button). Clicking this, will display a pop-up message asking you to confirm you want to add the selected users.

If you have not selected any users to add, then the green 'Exit without adding any users' button will still show. Click this if you do not wish to add any users, and you will be taken back to the main Admin screen.



1. Click the 'Add users' on the Admin page.
2. Add users manually or by uploading a CSV file.
3. Search for users by name or email address.
4. Tick the checkbox next to the user you wish to add.
5. Once you have selected the user to add, the green 'Exit without adding any users' will be replaced by 'Add selected users and exit'.
6. Once you select 'Add selected users and exit' a pop-up will appear: to confirm your choice, click the 'Yes, add selected users and exit' button. To return to the editing screen, click the 'Continue editing' button.

Adding users (2/2)

This section covers how to add users by uploading a file.

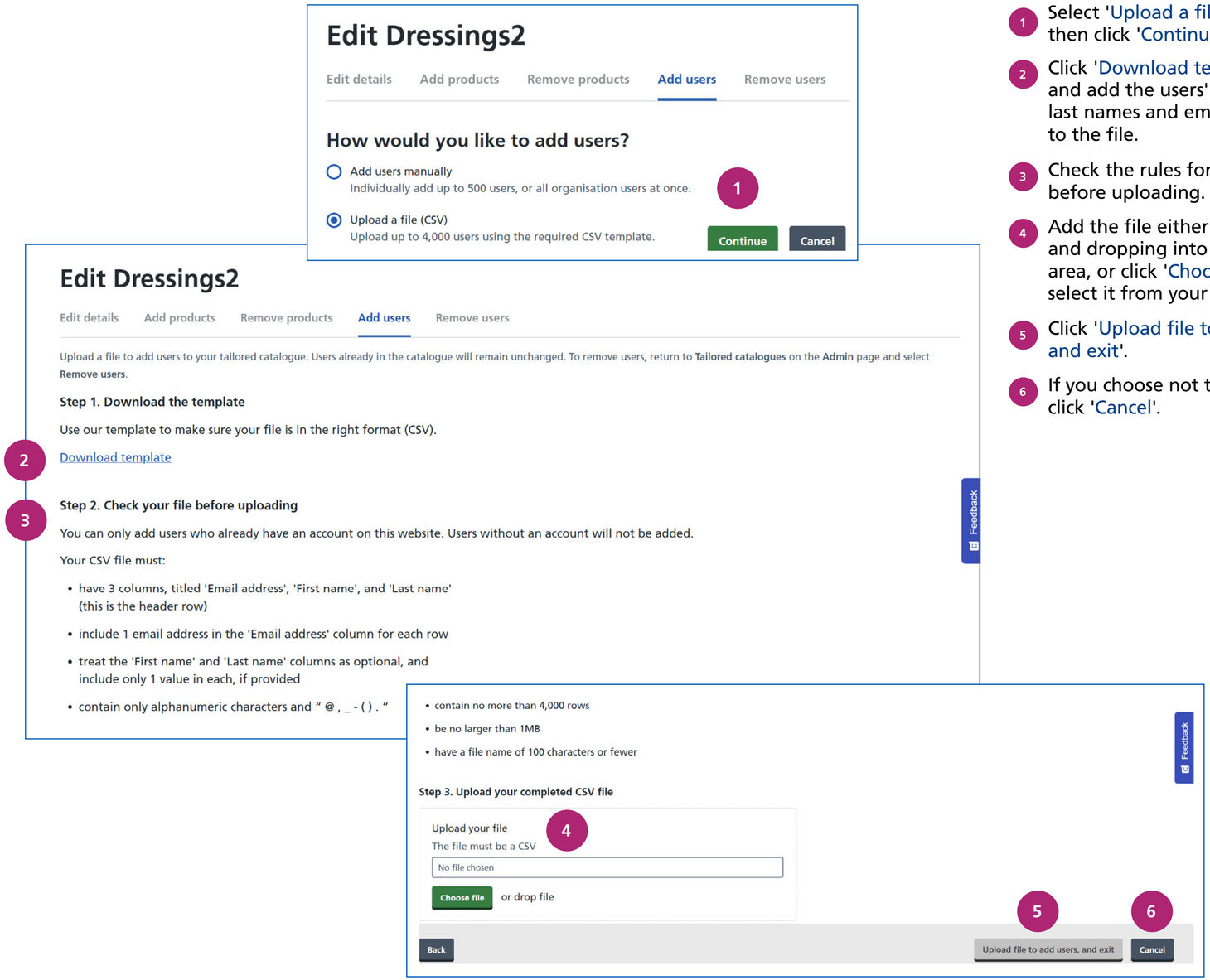
If you select 'Upload a file' then click 'Continue', you will be asked to download a template.

Please download the template and add the users' first names, last names and email addresses to the file (up to 4,000 users at one time, you can add more with a further upload).

Please ensure you check the rules for the file before uploading, which are listed on the upload page.

Then add the file either by dragging and dropping it into the upload area, or by clicking 'Choose file' and selecting it from your files. Then click 'Upload file to add users, and exit'.

If choosing not to add users, click 'Cancel'.



1. Select 'Upload a file (CSV)' and then click 'Continue' to proceed.
2. Click 'Download template' and add the users' first names, last names and email addresses to the file.
3. Check the rules for the file before uploading.
4. Add the file either by dragging and dropping into the upload area, or click 'Choose file' and select it from your files.
5. Click 'Upload file to add users, and exit'.
6. If you choose not to add users, click 'Cancel'.

Removing users (1/2)

This section describes how to remove users from a tailored catalogue manually.

You can remove users from the Admin screen by clicking 'Remove users' for the relevant catalogue.

You can then select how you would like to remove users, either manually or by uploading a file.

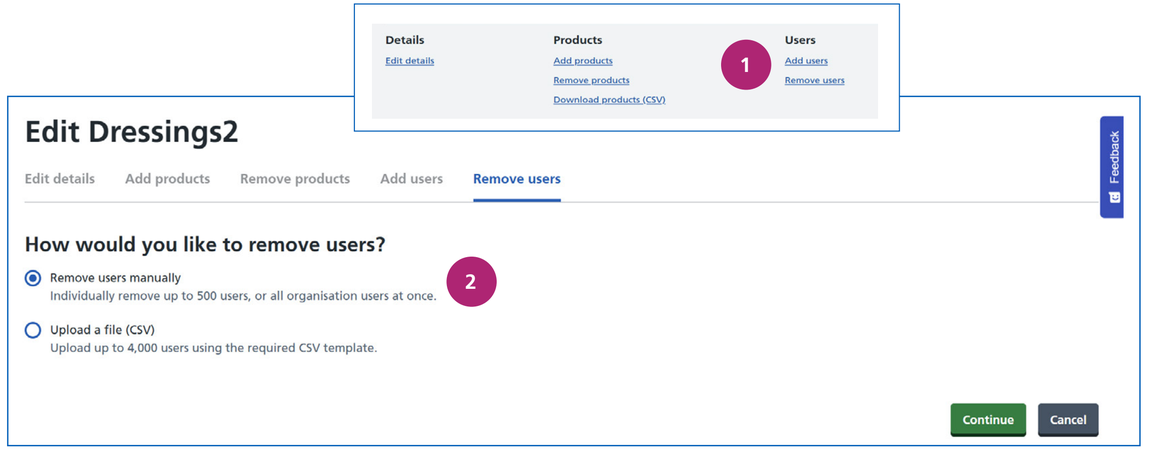
If you select to do it manually, this will display a list of all the catalogue users. Search for users by their name or email address.

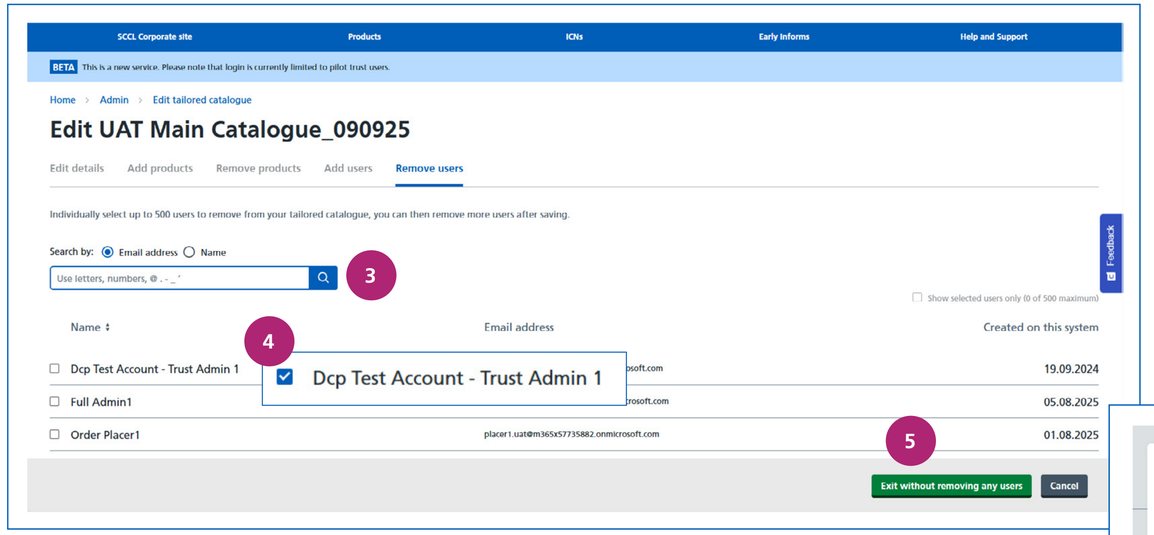
Tick the checkbox against the user(s) you wish to remove.

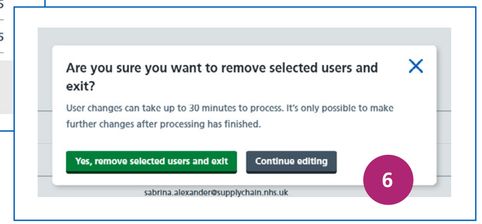
Once you've selected the user(s) to remove, the green 'Exit without removing any users' button will change to say 'Remove selected users and exit'. After you have clicked this, a pop up message will ask you to confirm you want to remove the selected users.

If you have not selected any users to remove, then a green 'Exit without removing any users' button remain. Click this if you do not wish to remove any users.

You will then be taken back to the main Admin page.







1. Click the 'Remove users' on the Admin page.
2. Remove users manually or by uploading a CSV file.
3. Search for users by name or email address.
4. Tick the checkbox next to the user(s) you wish to remove.
5. Once you have selected the user(s), the green 'Exit without removing any users' will be replaced by 'Remove selected users and exit'.
6. Once you select 'Remove selected users and exit' a pop-up will appear: to confirm your choice, click the 'Yes, remove selected users and exit' button. To return to the editing screen, click the 'Continue editing' button.

Removing users (2/2)

This section covers how to remove users from the tailored catalogue by uploading a CSV file.

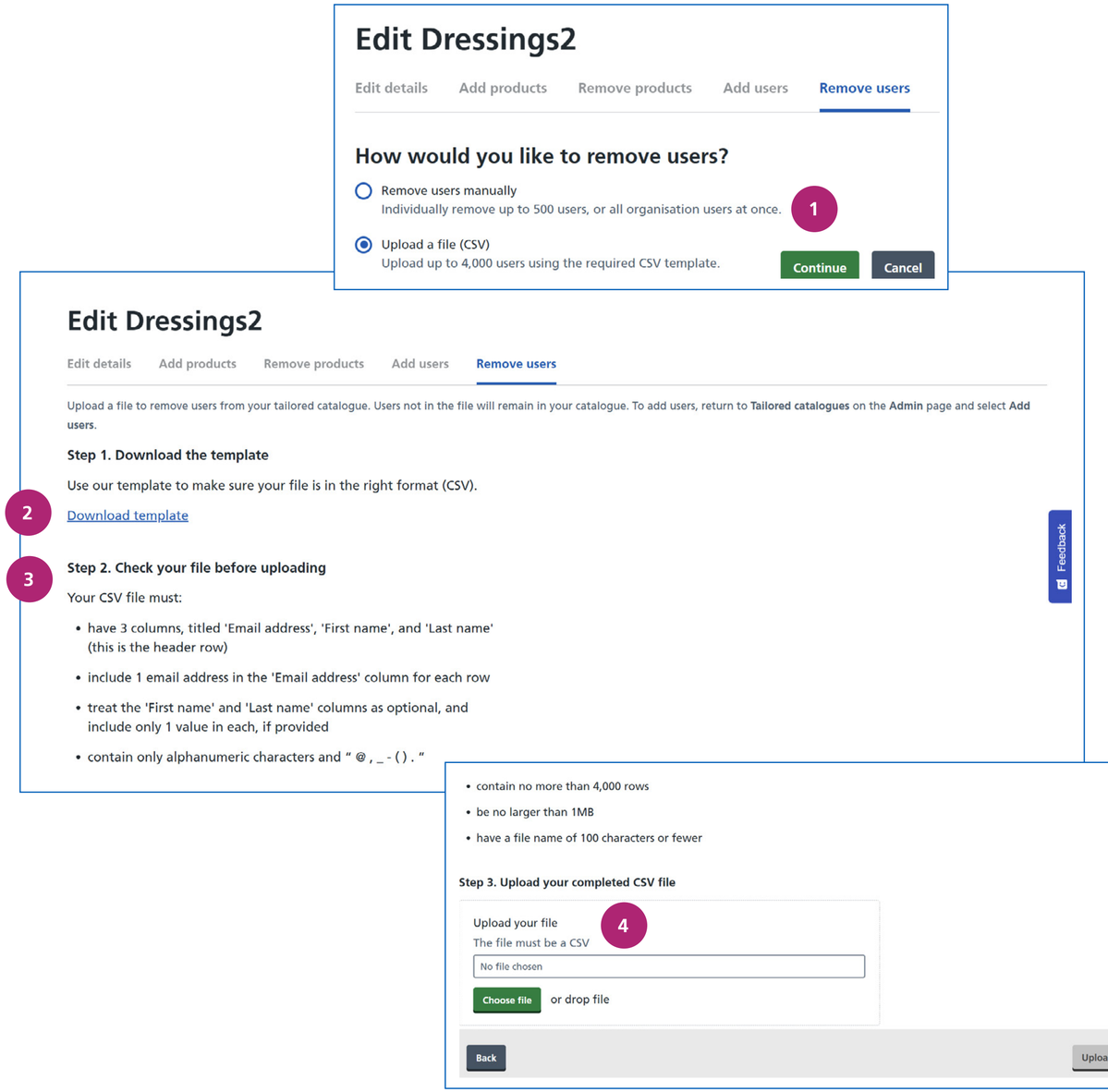
If you select 'Upload a file' then click 'Continue', you will be asked to download a template.

Please download the template and add the users' first names, last names and email addresses that you want to remove to the file (up to 4,000 users at one time, you can remove more with a further upload).

Please ensure you check the rules for the file before uploading, which are listed on the upload page.

Then upload the file either by dragging and dropping it into the upload area, or by clicking 'Choose file' and selecting it from your files. Then click 'Upload file to remove users, and exit.

If you choose not to remove users, click 'Cancel'.



1. Select 'Upload a file (CSV)' and then click 'Continue' to proceed.
2. Click 'Download template' and add the users' first names, last names and email addresses to the file.
3. Check the rules for the file before uploading.
4. Add the file either by dragging and dropping into the upload area, or click 'Choose file' and select it from your files.
5. Click 'Upload file to remove users, and exit'.
6. If you choose not to remove users, click 'Cancel'.

Download users from the tailored catalogue

This section explains how to download the users from your tailored catalogue.

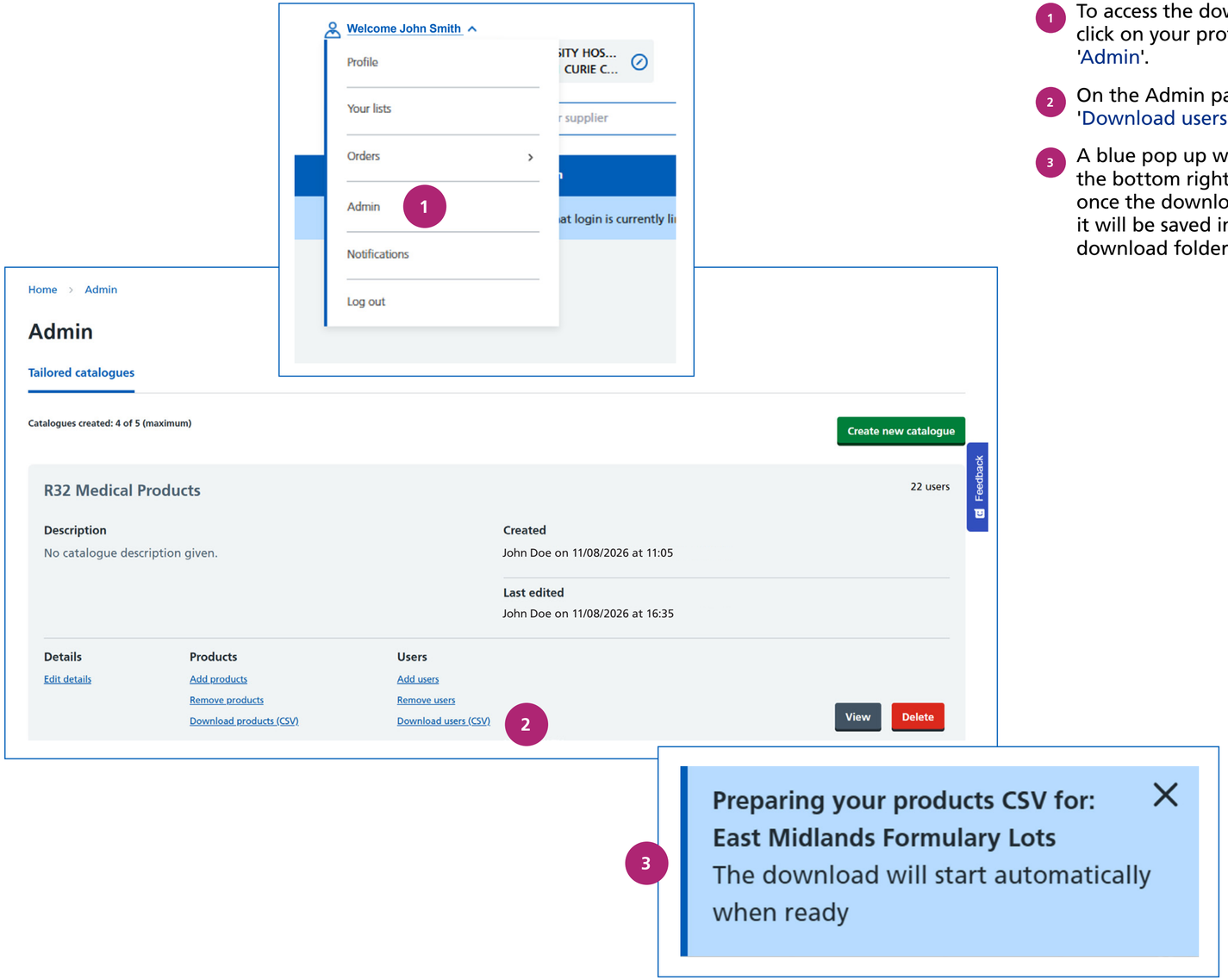
You can download all of the users in a specific tailored catalogue by selecting 'Download user (CSV)'.

After clicking the button, a blue notification pop-up will appear in the bottom-right corner of your screen. This message confirms that your CSV file is being prepared for download.

The notification will remain visible for approximately four seconds before automatically disappearing. This is normal and does not affect the download process.

Once the file has finished downloading, it will be available in your browser's download area or in your PC's standard downloads folder, depending on your browser settings.

The file will display email address, first name and last name of the users assigned to that tailored catalogue.



1. To access the download users, click on your profile and go to 'Admin'.
2. On the Admin page, click on 'Download users (CSV)'.
3. A blue pop up will appear on the bottom right of your page, once the download has completed it will be saved in your usual download folder.

List creation

You can create up to ten lists. This page covers how to create a new list and how to share or keep it private.

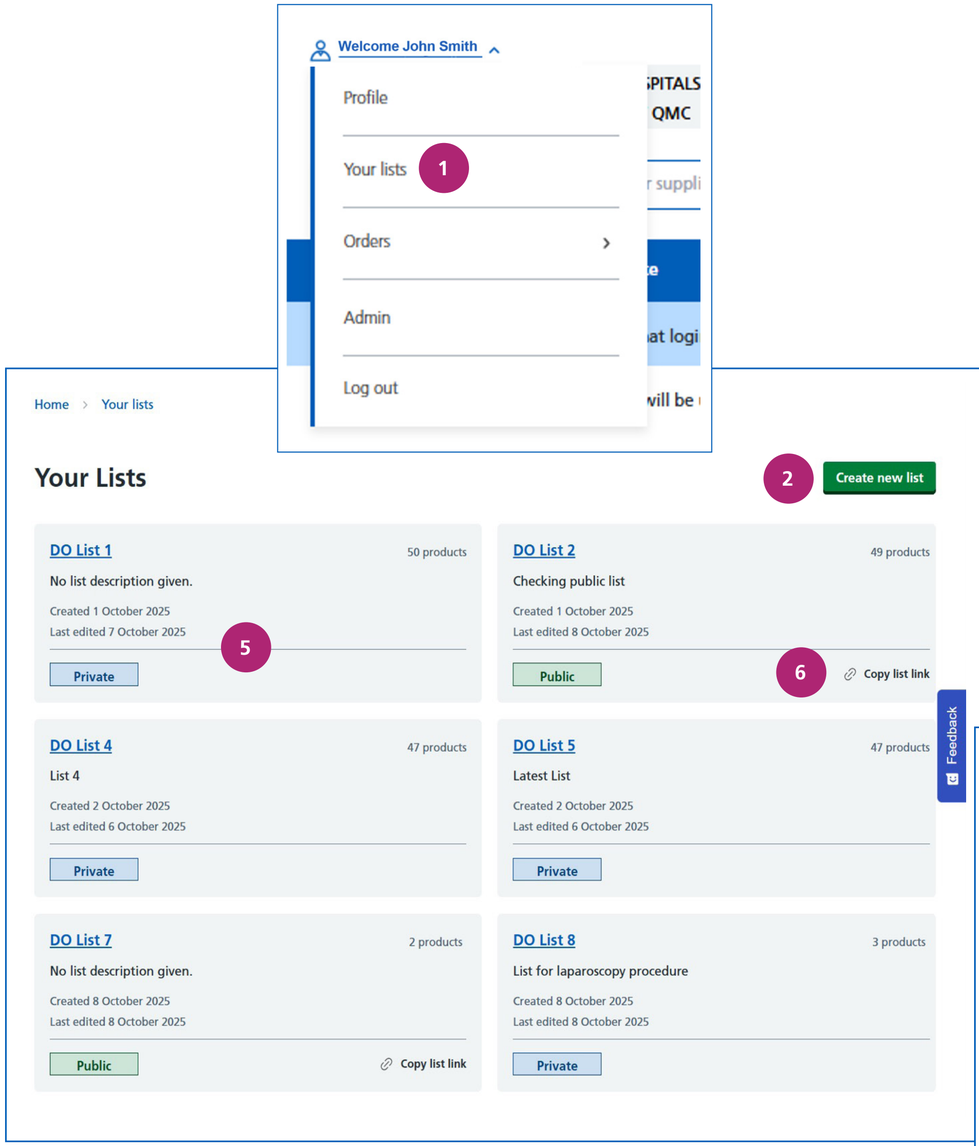
To create a list, you must be logged in. Any user can create a list. Access the List Overview page by clicking on the 'Your lists' link in the account drop down. A list can be created by clicking the 'Create new list' button on the List Overview page. A user can create up to ten lists.

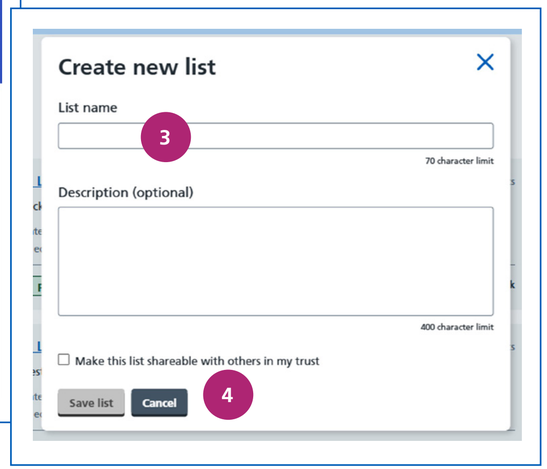
When the 'Create new list' CTA is selected, a pop-up page opens where the list name and list description (optional) can be added. It is compulsory to add a list name when creating a list.

A list can either be public or private. A private list can only be viewed by the list creator while a public list can be shared to others within the same trust. To make a list public, tick the 'Make this list shareable with others in my trust' box.

When the details have been saved by selecting the 'Save list' button, a card will be created on the list overview page with a summary of the list. The summary includes the list name, description, date created and edited, the number of products in the list and a private or public label.

Clicking the list name will open the List Detail page. A public list will have a 'Copy list link' which when clicked will copy the link URL to the clipboard which can then be shared to others in your trust. When the shared URL / link is selected, it will open the List Detail Page. Please note: a user will need to be logged in to open the shared link.





1. Select 'Your lists' from the account dropdown menu.
2. Click the green 'Create new list' button on the Your Lists page.
3. The pop-up page will ask you to enter a list name. This is compulsory. You can also add an optional description.
4. You can make a list public by checking the 'Make this list shareable with others in my trust'. Save your details by selecting 'Save list'.
5. The summary includes the list name, description, the date it was created and edited, number of products, and if it's public or private.
6. Click the 'Copy link list' to copy your list's url to clipboard.

Adding products to a list

You can add a product to a single list or multiple lists at the same time.

You can add a product to a single list or multiple lists at the same time. To add a product to a list, open the product page and select 'Add to list'. This will open an 'Add to list' pop-up screen.

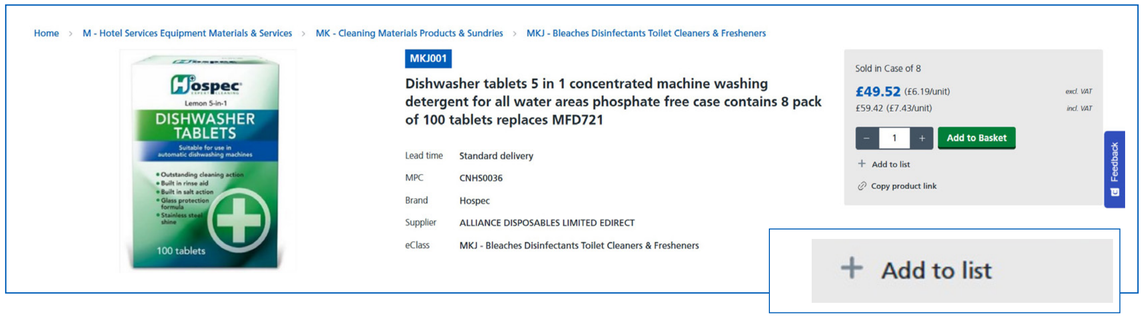
Lists previously created will be displayed on the 'Add to list' screen. A product can be added to one or multiple lists by ticking the box or boxes next to the list you require. If a product is already in a list, the checkbox next to the list will be preselected when the 'Add to list' screen is opened.

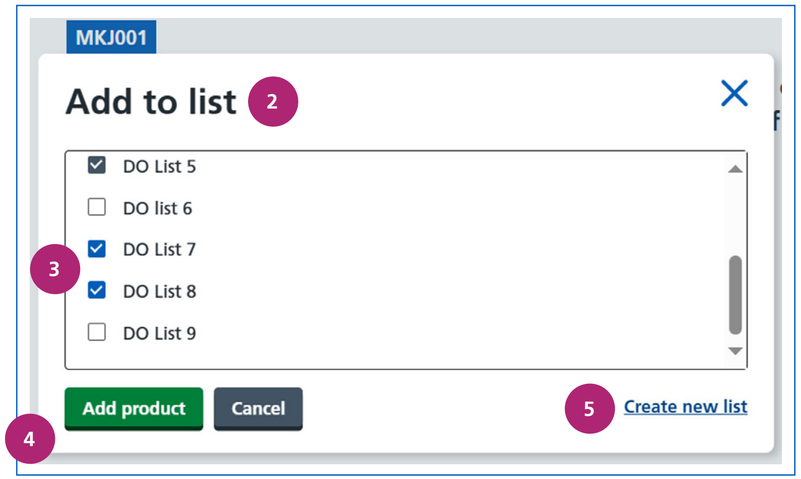
Clicking the 'Add product' button will add the product to the list and close the 'Add to list' screen. As many as 50 products can be added to a list.

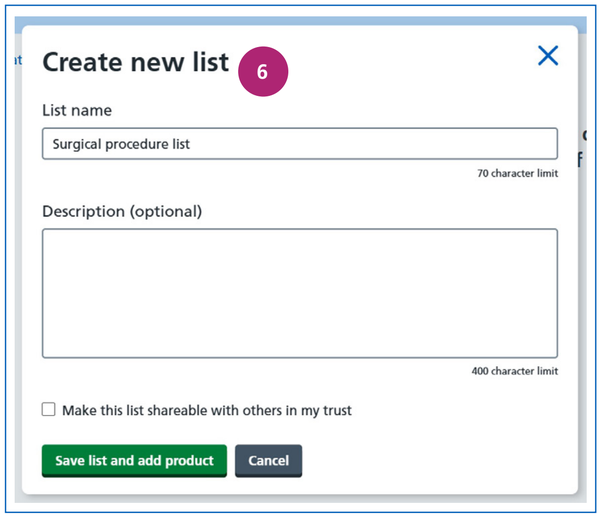
A new list can be also created from the 'Add to list' pop up screen. This can be done selecting the 'Create new list' link.

This will open the 'Create new list' screen. The list name and description (optional) can then be added. To save the list, select the 'Save list and add product' button. This will save the list and automatically add the product to the list.

You can add up to 30 lists.







1. Click 'Add to list' from a product's detail page.
2. A pop-up will open where previous lists are available.
3. Scroll to find the lists you would like to add a product to. Choose a list by clicking the checkbox. You can select multiple lists.
4. Click the green 'Add product button' when you've selected all lists you would like to add the product to.
5. You can also create a new list from this pop-up screen. Click the 'Create new list' link.
6. Add the name and (optional) description. To save the new list, select 'Save list and add product'.

List detail page

When you click into a list (see page 30 for creating a list), you can now add products to your basket or remove products from the list.

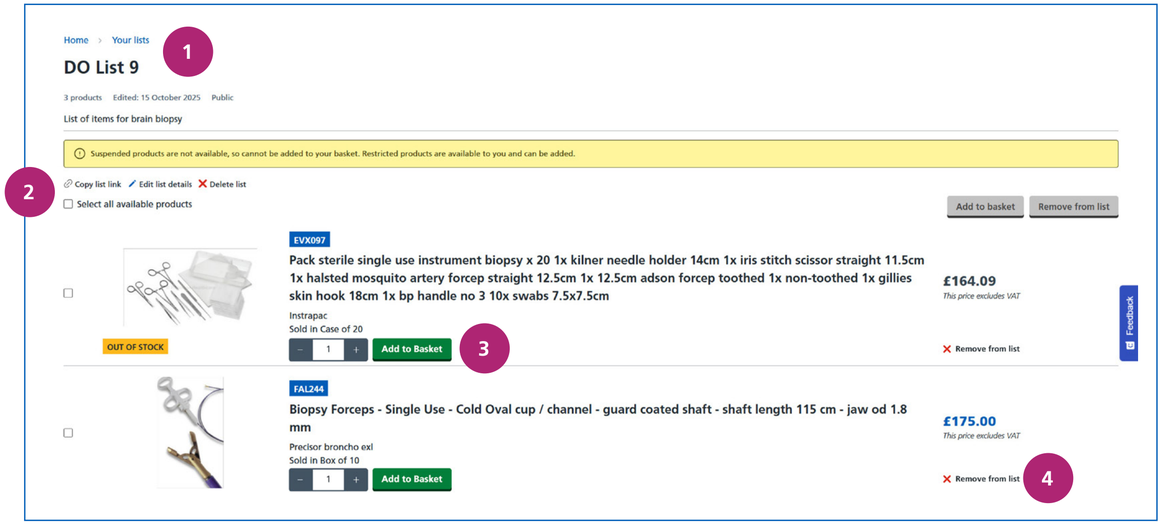
The products in a list can be viewed on the list detail page. Options to copy the list link (if public), edit the list or delete the list are available on the list detail page.

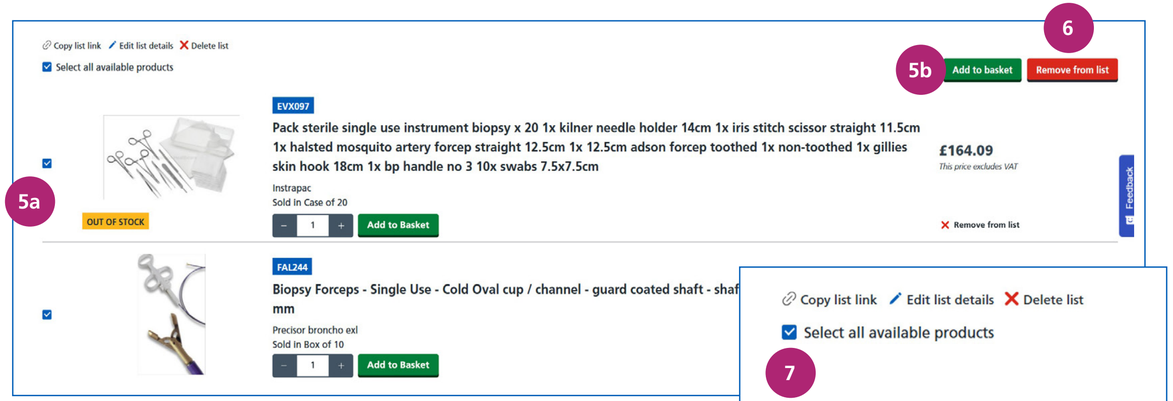
The 'Add to basket' function is available under each product. You will be able to add the product to your basket if your user role allows and that product is available to order.

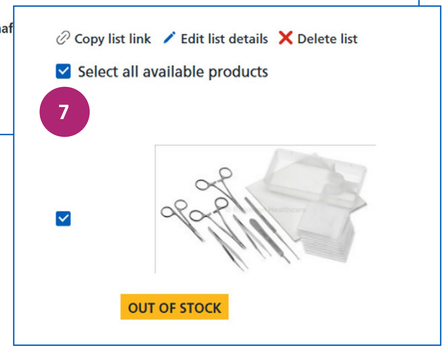
To add multiple products to the basket, tick the box next to the products you wish to add and click on the 'Add to basket' button at the right corner of the list. A message will appear in the bottom right-hand corner of the page confirming the action.

The 'Remove from list' function can be used to remove items from a list. To remove multiple products from the list, tick the box next to the products you wish to remove and click on the 'Remove from list' button at the right corner of the list.
A message will appear in the bottom right-hand corner of the page confirming the action.

The 'Select all available products' can be used to select all the products within the list that are available to buy. The products can then be added to the basket or removed from the list using the respective buttons.







1. You can view the products in a list by clicking into the List Detail page.
2. There are options to 'Copy list link', 'Edit list details' or 'Delete list' from here.
3. To add products to your basket, click the 'Add to basket' under the item description, amending the quantity if required.
4. You can remove items from the list by selecting 'Remove from list'.

5a. To add multiple products to your basket, select the checkboxes against the products you wish to add.

5b. Click the green 'Add to basket' button to add your selection to your basket.

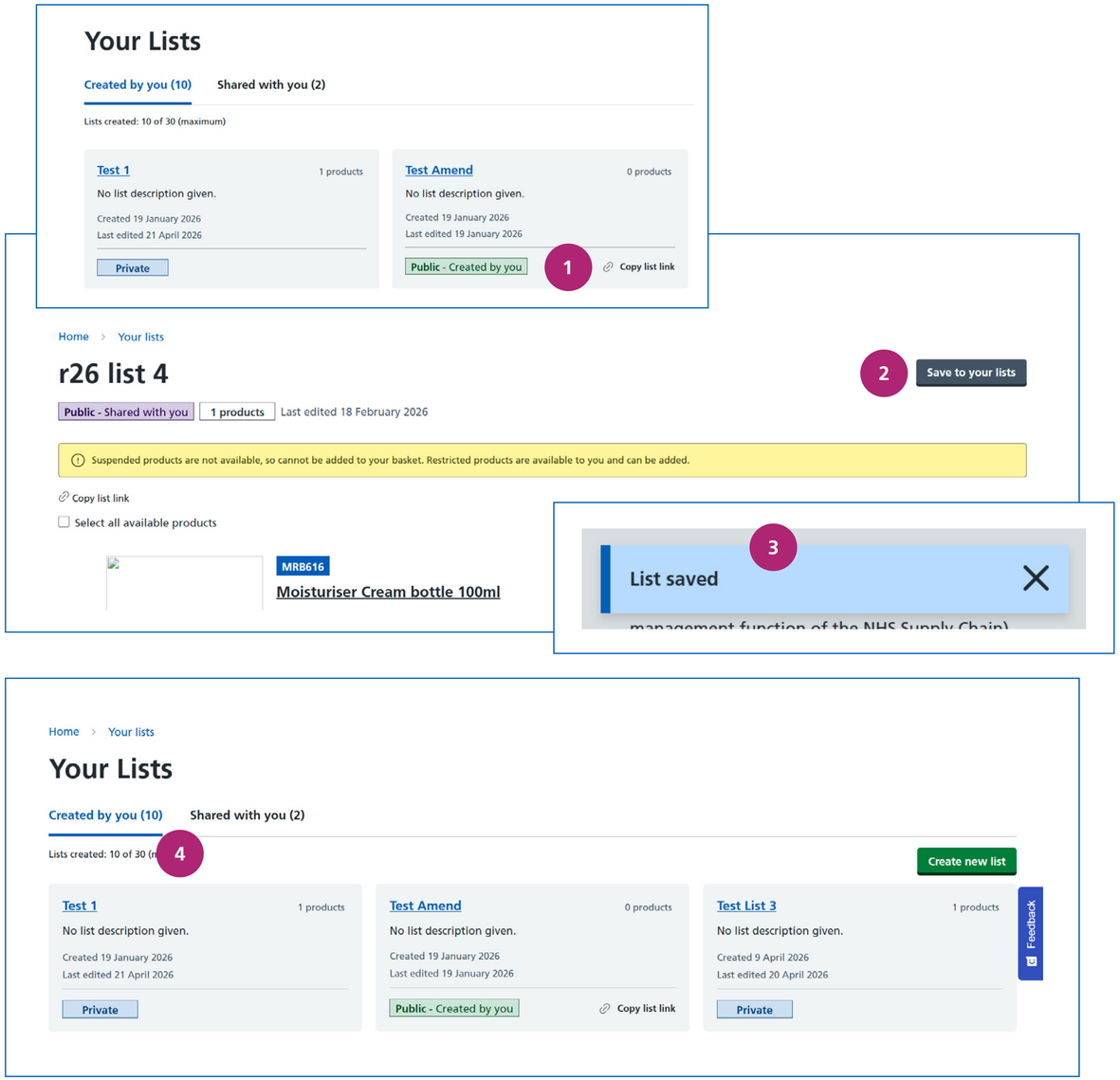
6. To remove the selection from your list, click 'Remove from list'.
7. You can also select all products that are available from your list by clicking 'Select all available products'.

List detail page

This section covers how to share your lists with your colleagues.

If your list is public and not private, you can share the list with a colleague by clicking 'Copy list link' and pasting the link in a Teams message or email.

If a colleague shares a list with you, you will be able to view it and click 'Save to your lists'. You will then be able to find this list under the 'Shared with you' tab in 'Your lists'.



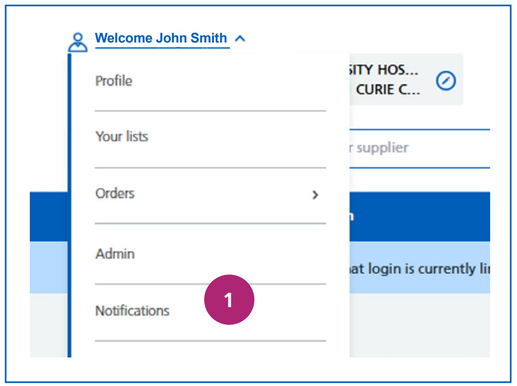
1. Once you have created a public link, you can now share this list by clicking 'Copy list link'.
2. Once this link has been received by the user, they can click on the link - log into the new catalogue and wait for the list to be opened. Once loaded you can now select 'Save to your lists'.
3. You will see a pop up banner at the bottom of the page once the list has been saved.
4. You can now go to your Lists under your profile and select from your own lists and any shared lists.

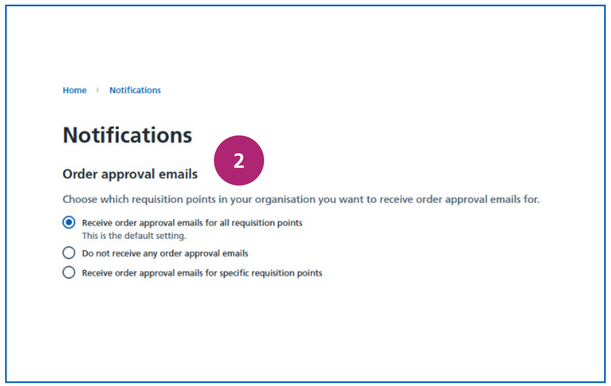
Email notification for approvals

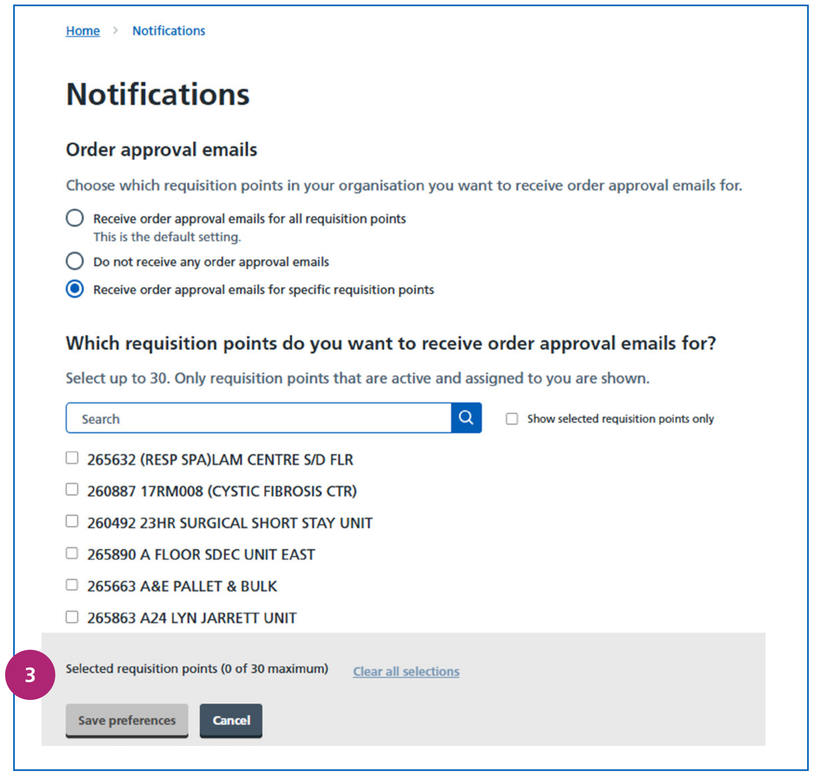
This section covers how to set up email notifications for approvals.

To manage your order approval email notifications, begin by clicking on your profile and selecting 'Notifications'.

From there, you can choose whether to receive all notifications, none, or tailor your preferences by selecting specific requisition points. After making your selection, click 'Save preferences' to ensure you only receive notifications relevant to your chosen requisition points.







1. To access the order approval email notifications, click on your profile and go to 'Notifications'.
2. You have three choices: to receive all / none, or select the required requisition points you would like to receive notifications for.
3. Once you have selected your requisition points, click on 'Save preferences' and you will only receive notifications for those requisition points.

Changing organisations and trusts

This section covers how to change your organisation.

Accessing your organisation

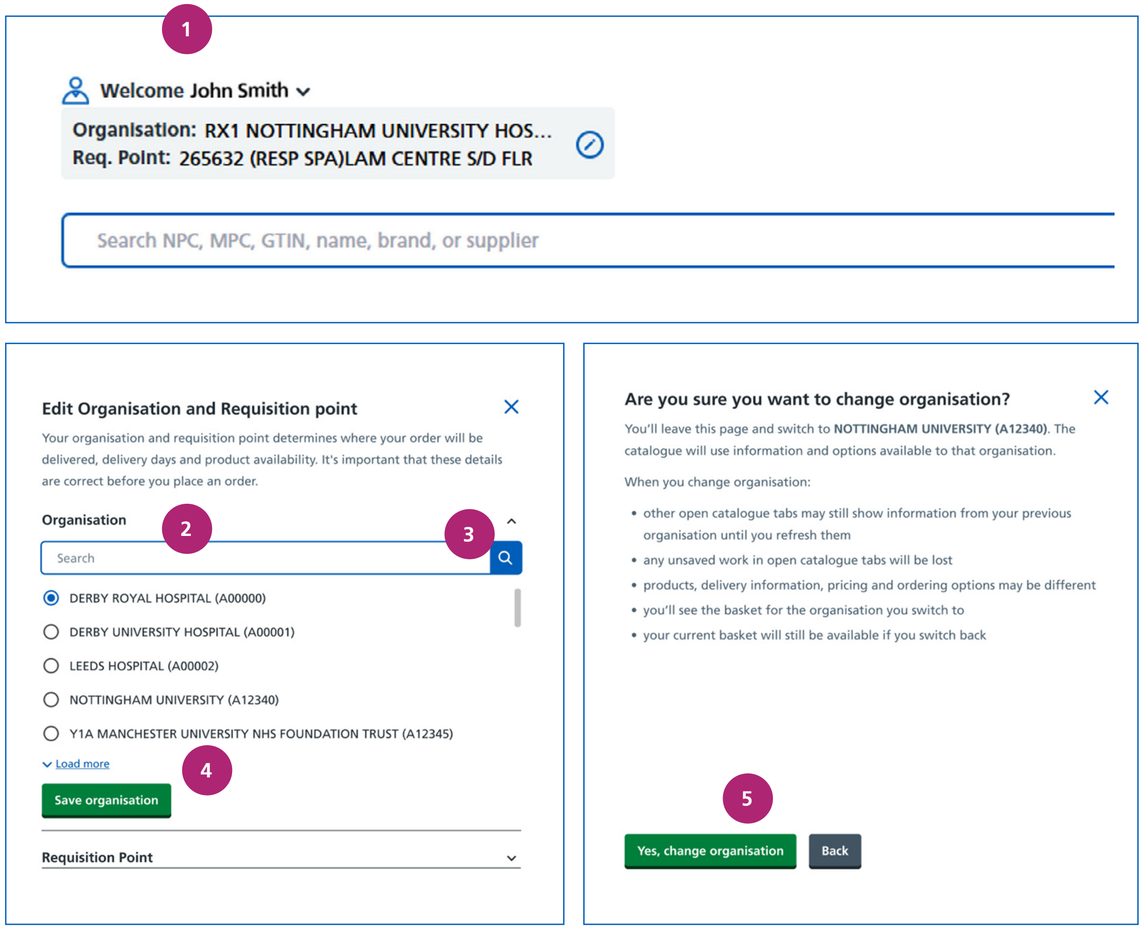
- Select the box containing your current organisation.

Choosing the organisation

Before creating a user, you must select the organisation you want to create the user for from the options available to you.

- Click the organisation drop-down to expand the field.
- The search bar can be used to find the correct organisation.
- Select the required organisation.
- Click 'Save organisation'.
- Click 'Yes, change organisation to proceed'.

Currently to add a user to more than one trust, the request needs to be sent to: digital.commerce@supplychain.nhs.uk



1. Login to your account and select the box containing your current organisation.
2. Click the organisation drop down menu to expand the field.
3. The search bar can be used to find the correct organisation.
4. Select the required organisation and then click 'Save organisation'.
5. Click 'Yes, change organisation' to proceed.

Adding users (1/2)

This section covers how to access user management and add users.

To create and edit users, you will need to have an Admin role.

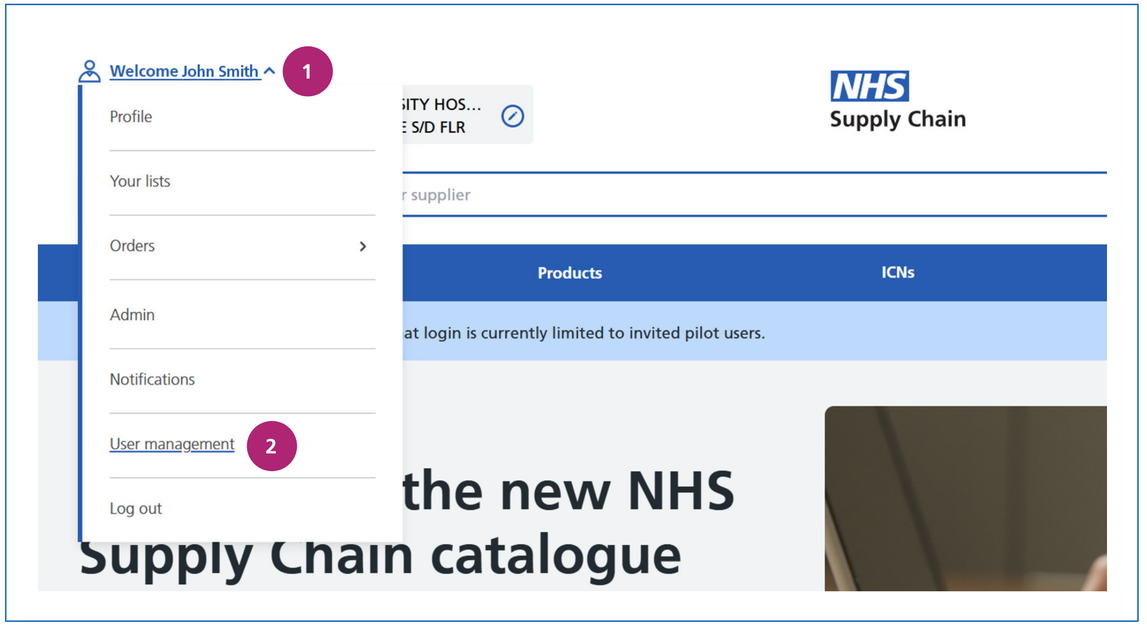
You can access user management by logging in and selecting your name at the top of the page. This will open a menu where you can select 'User management'. From there you can create a new user, edit an existing user or resend an invitation.

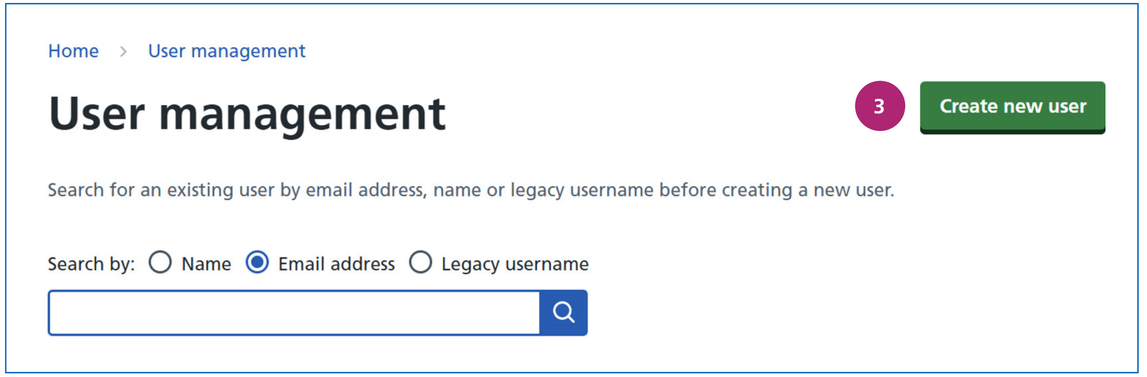
Before creating a user, select the organisation you want to create the user for from the options available. When creating a new user all fields need to be completed before it can be submitted.

Within the account setup there is a link where you can view all available user roles, including a description of each role and the permissions assigned to it.

Administrator accounts cannot be created online.

If you need to create an administrator, contact your ICS Manager or Regional Implementation Specialist.





1. Login to your account and select the drop down next to your name.
2. Select 'User management' from the drop down.
3. Click 'Create new user' from the User management page.

Adding users (2/2)

This section covers how to access user management and add users.

You will need to provide the users:

- First name
- Last name
- Email address
- Invitation email address
- Existing username from the NHS Supply Chain website.

You will also be asked whether the user should have access to all requisition points:

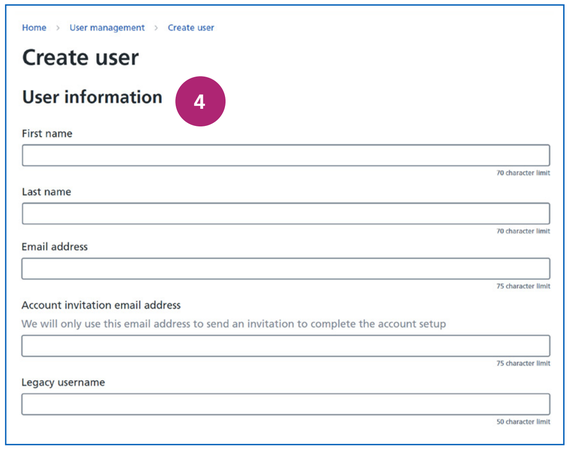
- **Yes:** Access is granted to all requisition points within the organisation.
- **No:** Existing requisition point access from the NHS Supply Chain website is carried over.

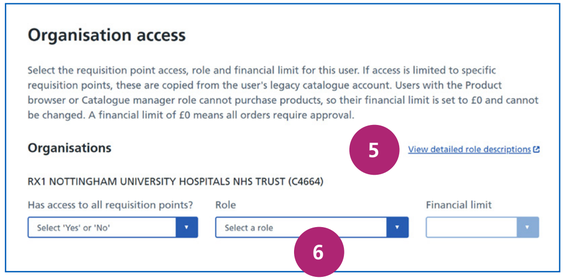
A link within account setup provides details of all available user roles and permissions.

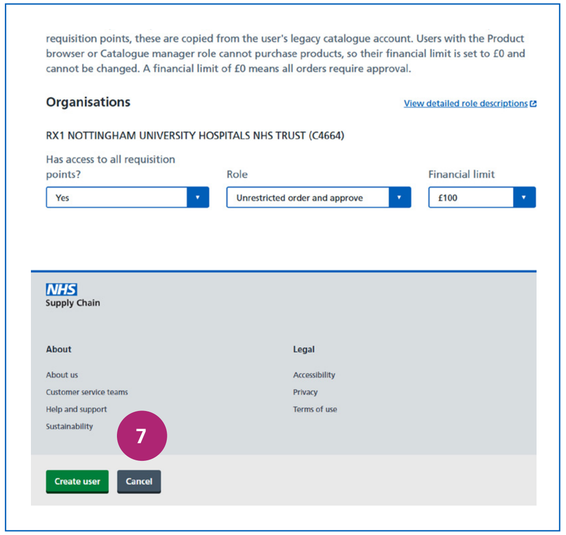
You will need to set up an appropriate financial limit for any user who can place or approve orders. Product Browser users do not require a financial limit. A limit of £0 allows users to place orders, but approval from an authorised user is required before processing.

The maximum financial limit is £100,000. Unlimited financial limits are not available.

Please note that **editing users also follows steps 4-7** below.







4. Complete all the required fields.
5. Detailed information for user permissions and roles can be viewed by clicking 'View detailed role descriptions'.
6. Select 'Yes or No' for access to all requisition points, alongside the role for the user and the required financial limit for the user.
7. Click 'Create user' once the button has turned to green.

Editing users

This section covers how to share your lists with your colleagues.

You can also review and update the details of an existing user.

To find the user you want to review, you can search using their name, email address or legacy username. Once you have selected the user, you can review their account details and make any changes that are needed.

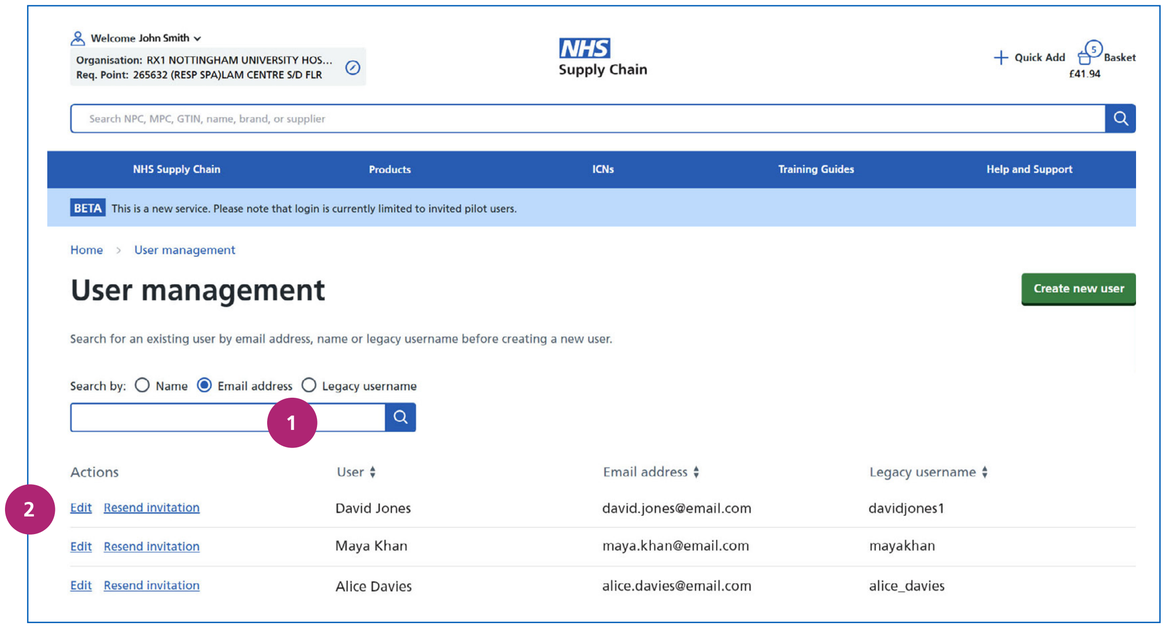
The fields shown when editing a user are the same as those used when creating a new user.

If a user has not completed the account setup, you can resend their invitation from user management.

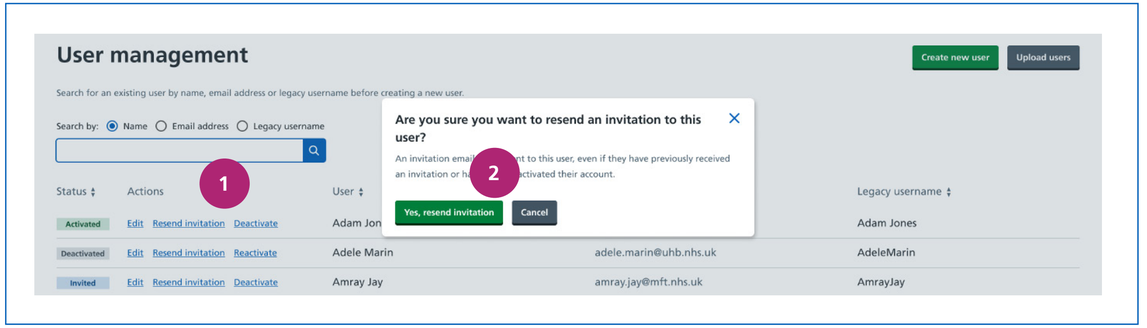
Resending an invitation:

Select 'Resend invitation' for the relevant user. A confirmation box will appear asking you to confirm that you want to resend the invitation.

Once confirmed, a new invitation will be sent to the user's invitation email address.



3 **The steps to edit users follows the same steps as adding users. Once you have selected 'Edit', please refer to the previous page (page 42) and follow steps 4-7 to complete this process.**



1. A user can be searched for by name, email address or legacy username.
2. Click 'Edit' to begin.
3. You will need steps 4-7 on page 42 to complete the edit users process. These steps are the same as adding users.

To resend an invitation:

1. Click 'Resend invitation'.
2. Click the green 'Yes, resend invitation' button in the confirmation box.

Bulk user upload (1/2)

This section covers the first two steps for uploading users in bulk. The final step is on page 45.

Once you are logged in, open the drop-down menu next to your name and select 'User management'. Select 'Upload users' button on the right-hand side of the User management page.

The Upload users page contains detailed instructions to guide you through the process. The upload is split into three steps.

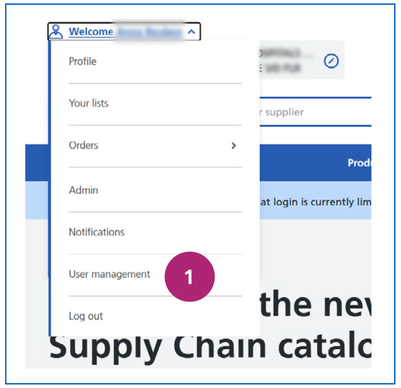
Step 1:

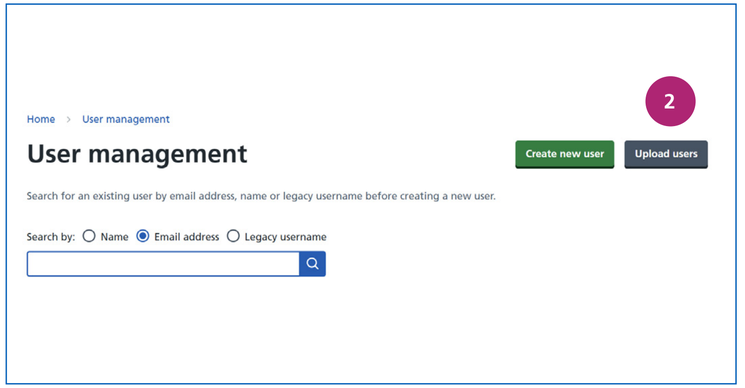
- In step 1, begin by downloading the template CSV file. You'll use this template to add the details of the users you want to upload. You should also download the reference CSV file, which will help you complete the template correctly.

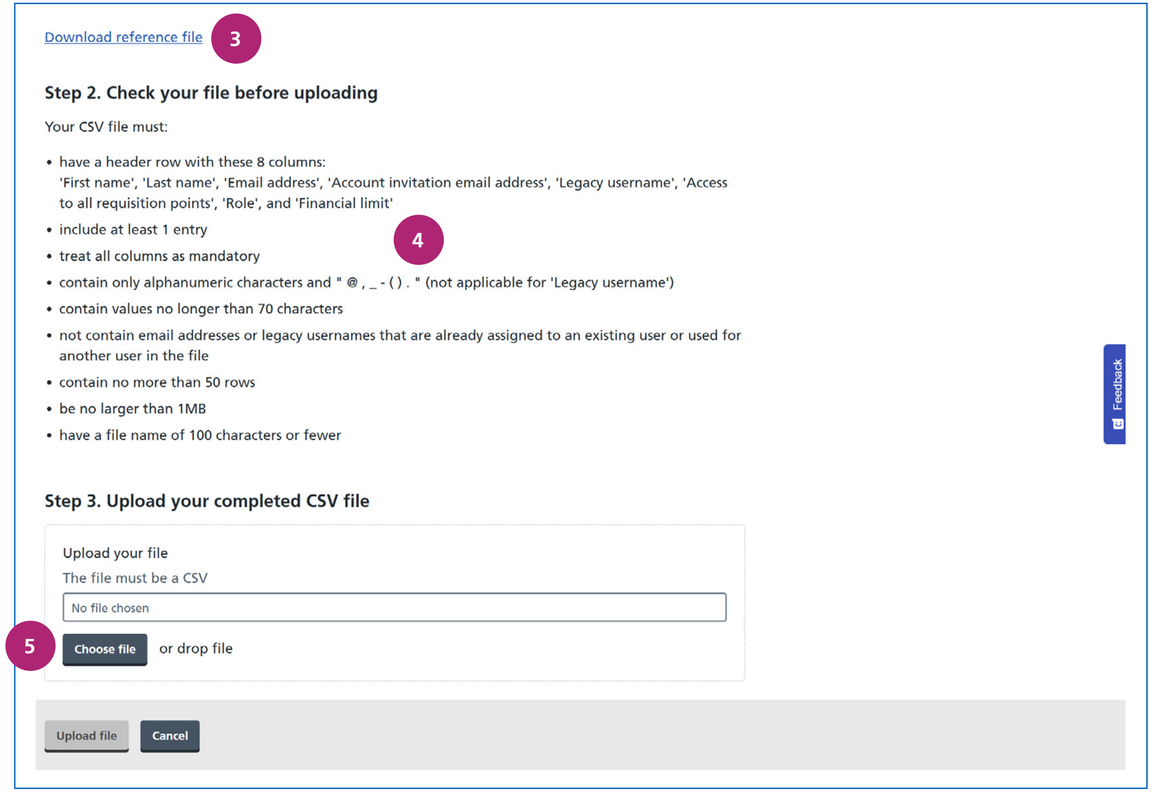
Incorrectly formatted or missing information will prevent your file from uploading successfully.

Step 2:

- Before uploading, make sure your CSV file includes all eight required columns and at least one user entry. All fields are mandatory, values must be no more than 70 characters long, and only permitted characters can be used.
- Email addresses and legacy usernames must be unique and cannot already exist in the system or be duplicated within the file. The file can contain a maximum of 50 user records, must be smaller than 1 MB, and the file name must not exceed 100 characters.







1. Start by logging into your account. Once you are logged in, open the drop-down menu next to your name and select 'User management'.
2. Select the 'Upload users' button on the right-hand side of the User management page.
3. Begin by downloading the template CSV file.
4. Carefully review the requirements as your CSV file won't upload correctly if it's incorrectly formatted or missing information.
5. Select 'Choose file' to upload, or drag and drop it into the 'Upload your file' area.

Continues overleaf.

Bulk user upload (2/2)

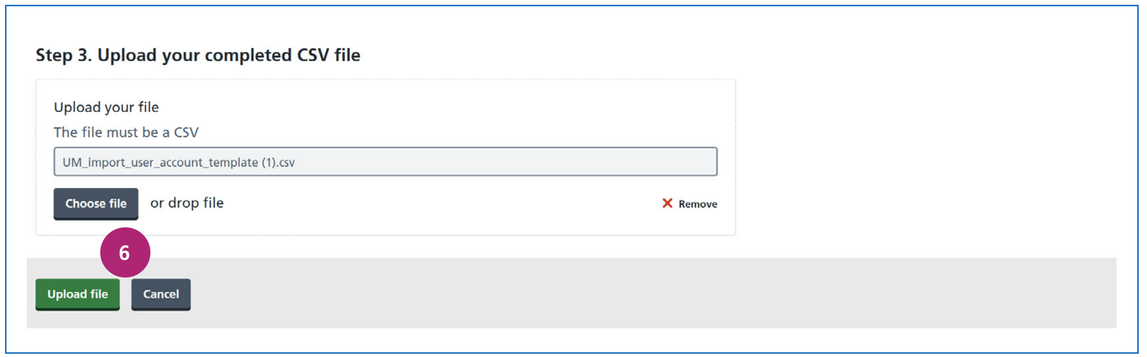
This page covers the final step for uploading users in bulk.

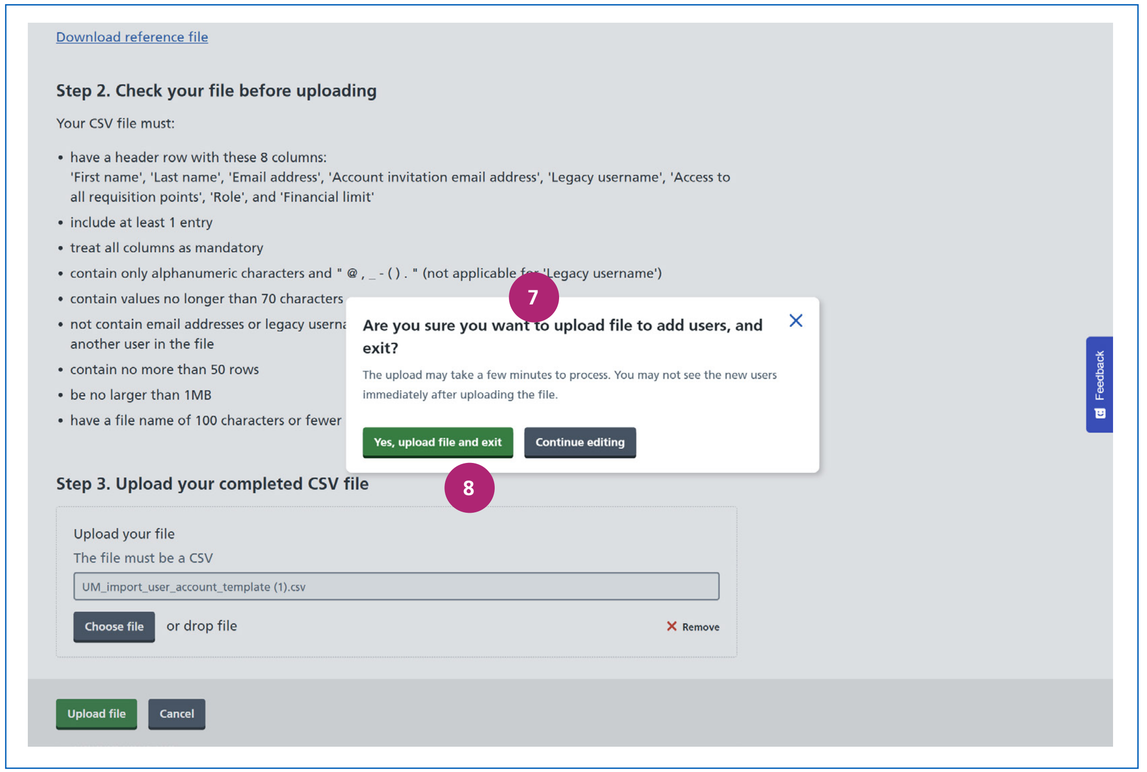
Step 3:

- In step 3, add your completed CSV file. You can choose the file from your device or drag and drop it into the 'Upload your file' area.
- Once your file has been added, the Upload file and Cancel buttons will become available.
- If you click 'Cancel', a warning will appear asking you to exit the page or continue editing.
- If you select 'Upload file', you'll be asked to confirm that you want to continue. You can either confirm or return to editing.

Once the upload has been confirmed, you'll see notifications showing the progress of your upload. These will let you know if there are any errors, when the upload is in progress and how many users have been successfully added. When the upload is complete, you'll return to the User management page.

To see the users you've just added, manually refresh the page. Your newly uploaded users will then appear in the user list.





6. Once your file has been uploaded, the 'Upload file' and 'Cancel' will be available. If you select 'Cancel', a warning will ask you to either exit the page or continue editing.
7. If you click 'Upload file', you'll be asked to confirm that you wish to continue. You can either confirm or return to editing.
8. Confirm the upload by selecting 'Yes, upload file and exit'. You will see notifications showing the progress of your upload.

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