

MDS Quick Guide – Recurring Web Orders

V 1.1 updated 04/06/21.

Overview:

This quick guide will walk you through the basic steps of setting up recurring/automated/memorized orders. This process offers a simple and easy way to get your customers on a regular ordering pattern and build predictable purchasing models.

For the purposes of this quick guide, we will assume you have your customers, and products setup in your MDS system.

To create new recurring orders, add items to your order and choose to save as recurring order at check out. Once created you can choose the frequency and next ship date from this screen.

Note: You can choose the start date and each subsequent order will follow your schedule. Once the Order ships the Next Ship Date will automatically update and display.

To complete a recurring order, and stop it from creating new shipments, simply click the complete flag below.

To add or remove items to an existing order, create a new order and complete the old one.

To view the details of your recurring order, click on the +/- next to the Recurring ID.

Once your order is created if you want to have a confirmation of the new order emailed to the customer you can setup in the customer master file, and or once it ships you can have it send a copy of the packing slip/invoice.

Step 1. Creating your Recurring Web Order.

Create a Web order using any of the standard methods and go to the checkout screen.

Final Order Review 7.0

Electronic Document Management

Welcome DAVID | Order: A32515 \$38.79 | Checkout | 1-Click Checkout | View Order | Log out - Any issues?

Submit Order | Review Items | Email as Quote and Hold | Save as Recurring Order

1. Suggested Items to Reorder | 2. Review Shipping Information | 3. Review Payment Information

Please note that this order total may not include all final charges

Please choose your Preferred Method of Payment

If you wish to pay by Credit Card, choose an existing Credit Card or enter information below.

Billing Information: LEESBURG REGIONAL MEDICAL CENTER, 600 E. DIXIE AVE, LEESBURG, FL 34748

Enter Card Information: Card Number, MM, YYYY, CVV Code, Name on card, Billing Address, Zip, Choose a Card Type

Web Order # A32515, Sold To LEESBURG REGIONAL MEDICAL CENTER, Ship To LEESBURG REGIONAL MEDICAL CENTER

Line No.	Product No.	Product Description	Manufacturer	ORD QTY	UM	Price	Ext. Price
1	13668-0137-05	Escitalopram Oxalate 20mg tab 500	DERMA SCIENCES INC	1	EA / 1	\$33.10	\$33.10

You will see a new button called save as recurring order.

(top right in this picture)

Once you place your order a note will show advising you it was not processed as a shipment but saved as a recurring order

Order Confirm 7.0

Electronic Document Management

1) Review Order | 2) Shipping and Payment | 3) Order Complete

Order Confirmation for Web Order Number : A32515

Your order has been sent. Please print this confirmation for your records.

After printing click here to continue OR Click here to place a new order

Thank you for using our website.

This Order was saved as a Recurring Order

Web Order # A32515, Sold To LEESBURG REGIONAL MEDICAL CENTER, Ship To DASDDAS ENTER YOUR NEW ADDRESS DO NOT SHIP PATIENT ID 334242 SUFFERN, NY 10999

Required Date 06 APR 2021, LEESBURG, FL 34748, USA

Customer PO# None, Dept No. 100, Req. No., Ordered By David Fertig, Ship Method UPS - Next Day AM

Special Instructions: testing orders

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Step 2. Modifying or Updating your Orders

To modify an existing order items, you can complete the existing order and create a new one from it then add or remove items from the cart, then save as a new recurring order.

To update the frequency of when the order ships login to the website and go to Recurring Orders.

Showing 6 Recurring order(s) for LRMC LEESBURG REGIONAL MEDICAL.

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- Note: You can choose the start date here and each subsequent order will follow your schedule. Once the Order ships the Next Ship Date will automatically update and display.
- To complete a recurring order, and stop it from creating new shipments, simply click the complete flag below.
- To add or remove items to an existing order, create a new order and complete the old one.
- To view the details of your recurring order click on the [\[i\]](#) next to the Recurring ID

Line No.	Recurring ID	Frequency	Next Ship Date	Cust. PO#	Ship to Name	Create Date	Total Amount
1	[i] 01A00972	---		A23950	LEESBURG REGIONAL MEDICAL	02/20/20	\$18.00
2	[i] 01A00973	---		A23925	LEESBURG REGIONAL MEDICAL	02/20/20	\$9.00
3	[i] 01A00988	--- (Complete)	(Complete)	A25281	LEESBURG REGIONAL MEDICAL	03/26/20	\$27.82
4	[i] 01A01114	--- (Complete)	(Complete)	po12345	000002 WILLIE MCCLENDON	03/01/21	\$267.40
5	[i] 01A01115	---		po12345	000002 WILLIE MCCLENDON	03/01/21	\$15.00
6	[i] 01A01138	---		None	000001 DASDDAS	04/06/21	\$38.79
6 Items		1 Page				Previous	Next

Note: You can choose the start date here and each subsequent order will follow your schedule. Once the Order ships the Next Ship Date will automatically update and display. (it does not current refresh the screen when you change it so that you can update multiple orders.

Click on the frequency to change the shipping schedule –

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Line No.	Recurring ID	Frequency	Next Ship Date	Cust. PO#	Shipto Name	Create Date	Total Amount
1	01A00972	Daily		A23950	LEESBURG REGIONAL MEDICAL	02/20/20	\$18.00
2	01A00973	Weekly	(Complete)	A23925	LEESBURG REGIONAL MEDICAL	02/20/20	\$9.00
3	01A00988	Monthly	(Complete)	A25281	LEESBURG REGIONAL MEDICAL	03/26/20	\$27.82
4	01A01114	Quarterly		poi2345	000002 WILLIE MCLENDON	03/01/21	\$267.40
5	01A01115	Bi-monthly		poi2345	000002 WILLIE MCLENDON	03/01/21	\$15.00
6	01A01138	Semi annual		None	000001 DASDDAS	04/06/21	\$38.79

Options allow for Daily/Weekly/Quarterly/Bi-Monthly/Semi-Annual

Bimonthly would be twice a month, and Semi Annual is Twice a year (every 6 months)

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2	01A00973	W		A23925	LEESBURG REGIONAL MEDICAL	02/20/20	\$9.00
3	01A00988	--- (Complete)		A25281	LEESBURG REGIONAL MEDICAL	03/26/20	\$27.82
4	01A01114	--- (Complete)		poi2345	000002 WILLIE MCLENDON	03/01/21	\$267.40
5	01A01115	---		poi2345	000002 WILLIE MCLENDON	03/01/21	\$15.00
6	01A01138	---		None	000001 DASDDAS	04/06/21	\$38.79

To update the date, click on the date field and use the date select drop down to choose your next date.

Or enter your date manually in the format MM/DD/YYYY

To complete a recurring order, and stop it from creating new shipments, simply click the complete flag next to the ship date if it is Green, it means it is still active. Once you click it will change the data and frequency to say complete and move the order to history, you can always move it back and update the dates and frequency. – once you update a status message will appear at the top of the screen confirming your changes.

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