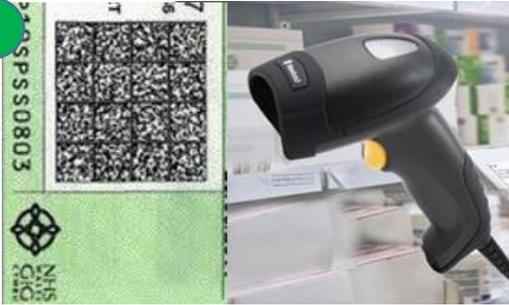


Welcome to your Pro Delivery Manager how to guide for creating a new patient and delivery setup



Creating a new patient

- Within CUSTOMERS either **SCAN RX** or click **+NEW CUSTOMER**
- If SCANNED, patient details auto populate
- If clicked **+NEW CUSTOMER**, you will be required to fill out details
- Once satisfied with patient information, click **SAVE**

Menu

Quick search: Type search text or scan a barcode here

Customers Orders

Customers

+New customer

Created	Entity Membership	Ref	First Name	Last Name ↑	Tags	Active
16/04/2020 09:13:19 AM	NPA Demo	C000063	Gurbaksh (Mrs)	ADOCH		✓

Customers > New customer

Entity membership: NPA Demo X

Other entities

Title:

First name: Susie

Last name: Smith

Gender: Female

Date of birth:

Home address

Type to search existing addresses...

Line 1: 123 The Main Road

Line 2:

Line 3:

Town/City: Bigtown

County: Bigcounties

Post code: AB12 3CD

Telephone:

Email address:

Enable email notifications ?

Mobile number:

Enable SMS notifications ?

Secondary contacts: Type to search...

Active:

Save Cancel

Once the patient data is populated you can press **SAVE** and this will open the Patient Screen

If you require any support, please call us on 01727 795911 or email: support@prodeliverymanager.com

Welcome to your Pro Delivery Manager how to guide for creating a new patient and delivery setup

Creating a new delivery for a NEW patient – step 1:

- Click on **+New Order**
- Click on **Add Sequence** and select **Pick up from Pharmacy, Delivery to Customer**
- This will then auto-populate the sequence to notify volunteers about deliveries

3 Customers > Susie Smith (C000191)

Customer info

Susie Smith
Gender: Female
Ref: C000191
Entity membership: NPA Demo
Addresses

Orders Order notes Schedules Events Communications Archived orders

+ New order

Created ↓	Ref	Managed By	Tags	Status	Previous Task		Next Task	
					Task	Task Status	Task	Target Date
No records found								

4 Customers > Susie Smith (C000191) > New order

Customer

Customer: Susie Smith
Customer tags:

Order details

Order status: New
Managed by: ? NPA Demo
Packages: ? 0

Items Task List Schedule

Queued (0)

Add Task Add Sequence
Pick up from Pharmacy, deliver to Customer

Save Cancel

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Creating a new delivery for a NEW patient – step 2:

- You will need to double-click on each of the TASKS in turn and allocate to **COURIERS**
- This will then notify all couriers associated with the pharmacy there are deliveries available
- Complete the same exercise for the 2nd task and click **SAVE**

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Customers > Susie Smith (C000191) > New order

Customer: Susie Smith

Customer tags:

Order details

Order status: In progress

Managed by: ? NPA Demo

Packages: ? 0

Order notes:

New note:

Tags: ? + New

External ref: ?

Save defaults...

Items Task List Schedule

Queued (2)

	Task	Location	Assigned...	Tags	Status	Target Date / Time	Requirements
1	Pick up from Pharmacy	NPA Demo	Unassigned		Current	FR 17/04/20	
2	Deliver to Customer				Pending	FR 17/04/20	

Assigned to: Unassigned

Location: NPA Demo

Default instructions:

Additional instructions:

Target date: 17/04/2020

Target time:

Tags: ? + New

Completion requirements:

- Contact must be present
- Must be customer
- Signature
- ID check
- PDM user must be present
- Signature

Administrators

- Alison Bonfield
- Chalana Lawrence
- Craig Cavener
- Ian Bradley
- Lorraine Witherall
- Lucy Whelan

Mark order as "completed" when final task is completed

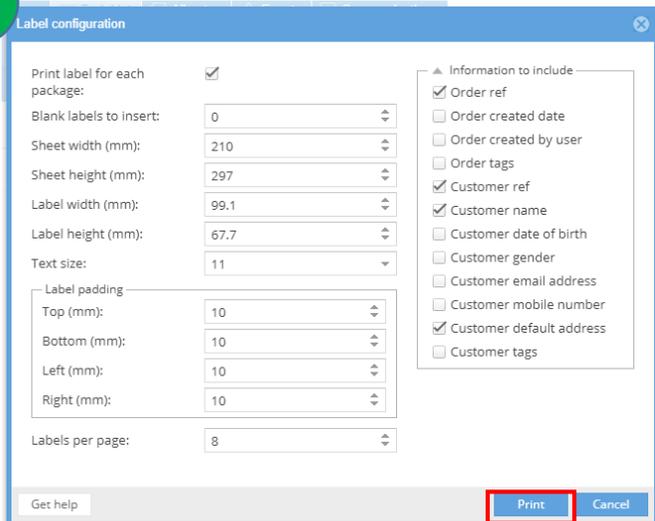
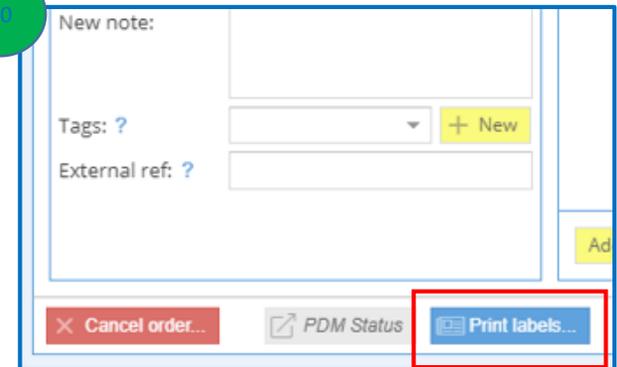
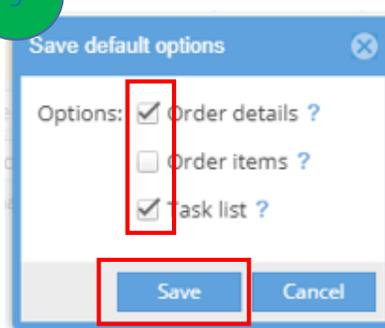
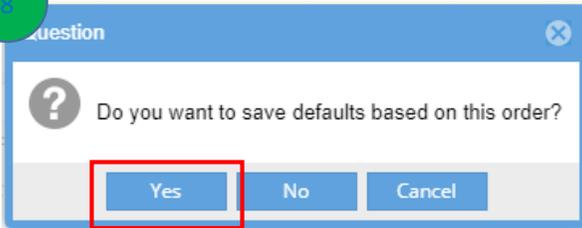
Save Cancel

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Welcome to your Pro Delivery Manager how to guide for creating a new patient and delivery setup

Creating a new delivery for a NEW patient – step 2:

- You will get prompted to Save defaults – select **YES**
- You will then get prompted to Save default options – tick **Order Details & Task List**, then **SAVE**
- Printing bag label – bottom left of screen select **Print Labels**
- Label Configuration POP-up – press **Print**
- Label is printed – affix to bag



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Order ref: P000012
Customer ref: C000191
Name: Susie Smith
Default address (Home): 123 The Main Road,
Bigtown, Bigcounties, AB12 3CD

PDM-191-12-0