

GO LIVE **GUIDE**

YOUR ESSENTIAL GUIDE TO THE ONLINE ORDERING SYSTEM

- Step-by-step guide to placing your first order
- Frequently asked questions
- Optimised process flow diagrams

- Maximising savings opportunities
- Reducing administration costs
- No investment required to upgrade



CONTENTS

PLACING AN ORDER	1
Login	
Search for an item	
Add to cart	
View Cart	
Authorisation	
Checkout	
Complete Your Order	
AUTHORISING ORDERS	5
How to Authorise an Order	
FAVOURITES	6
Creating a favourites list	
Working With Multiple Lists	
Ordering from a Favourites List	
INK & TONER FINDER	8
Finding the Correct ink & toner	
CONTRACT LISTS	9
Types of List on Contract	
I Need Something Else	
FREQUENTLY ASKED QUESTIONS	10
OPTIMISED PROCESSES	12
Customer Enquiry Process	
Quotation Process	
Additions to Amber List Process	
Online Ordering Process	

PLACING AN ORDER

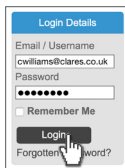
LOGIN

- i. Go to **shop.clares.co.uk**.



https://shop.clares.co.uk

- ii. Enter your username/email address and password into the log-in boxes.



Login Details

Email / Username
cwilliams@clares.co.uk

Password
.....

Remember Me

Login

Forgotten password?

- iii. Click **Login**.

SEARCH FOR AN ITEM

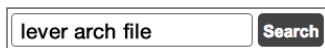
There are a number of ways to search for products:

- ▶ **Product code** - enter the product code into the search box.



9405023 Search

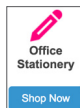
- ▶ **Keyword** - enter keywords into the search box.



lever arch file Search

💡 *If you shopped with Supply Chain, enter the Supply Chain code into the search box.*

- ▶ **Category** - select a category to view all related products.



Office Stationery

Shop Now

- ▶ **Contract** - select **Contracts** to view all of the contracted products available to you.



Home Browse Eco Products **Contracts** Favourites Fast Order Accounts Authorise Custom Stamps

Go Live Guide

ADD TO CART

- i. Select the product

Enter the quantity required

Click here to add product your cart

Click here to add product your cart

Select this option to carry on shopping

Images are for illustrative purposes only. For full specification please see Product Description.

Elba Mycolour Lever Arch File White [EACH]
Product Code: 1400328
Pack Of 1
Add to Cart

Your Price Only
£6.84
 Add to New Line in Cart
Add To Favourites
1 Order
Continue Shopping
More Items Like This

Product Details
Mycolour A4 Lever Arch File White/Lime Each Strong polypropylene with reinforced bottom edge for added durability. Transparent pocket on spine with label. Product can be personalised for free using www. elbaprint.com. 80mm capacity. Lime

- ii. Enter the quantity required.
- iii. Select **Order** to add the product to the shopping cart.
- iv. Select **Continue Shopping** to browse more products.

VIEW CART

- i. Select **View Cart** to review your order.

Shopping Cart

1 Items
Sub Total :£1.05
View Cart

- ii. Amend quantities or remove products if required.

Remove a product by clicking the cross

Amend required quantities here

Remove	Code	Description	Price	Qty	Total
	9405023	Banner A4 Lever Arch File 70mm Red [EACH] Pack Size : 1 Select Department	£1.05	1	£1.05

- iii. Click **Update** to confirm any changes.

AUTHORISATION

! Depending on your Trust's policy, your order may or may not require authorisation. If your order does not need to be authorised, please continue to section 6. **Checkout.**

- i. If you have only one authoriser, your order will automatically be sent to them. Their name will appear at the top of the screen.

This order was placed by Chris Williams Chris Williams (cwilliams@clares.co.uk) of Department Marketing

- ii. If you have more than one authoriser, you will need to select one from the drop-down list.

Authoriser For this order:

- ✓ Send To All Authorisers
- furniture@clares.co.uk
- print@clares.co.uk

CHECKOUT

- i. If you have reviewed your order and are satisfied with everything, click **Checkout.**
- ii. Select the correct delivery address and cost centre from the drop-down lists and add an order reference if required.

Enter your order reference here

Select the correct cost centre

Any additional order notes should go here

Select the correct delivery address

Order Details

Order Reference Ad hoc

Invoice To

Deliver To
 Select the correct delivery address

Department

Additional Information

Order Notes

! The **Order Notes** section should not be used to inform Clares of changes to a delivery address. In this case, please contact our customer support team at amendments@clares.co.uk.

COMPLETE YOUR ORDER

- i. Select the **Complete** button to finish your order.
- ii. If your order is being for authorisation, you will given an AUTH reference. Please keep this safe and quote it if you need to contact Clares.

Your order has been sent for authorisation.
You exceeded your spend limit by 3.97
Your Authorise reference Number is : AUTH00194248

- iii. If the order is not being authorised, you will given an SORD reference. Again, please keep this safe should you need to contact Clares.

Your order has been placed and an email confirmation sent. Thank you.
Your Sales Order Reference is: SORD00641613
[Print Confirmation](#)

AUTHORISING ORDERS

HOW TO AUTHORISE AN ORDER

- i. If there are orders waiting to be authorised, an **Authorise** tab will appear in the top menu bar.



- ii. If you would like to review an order before authorising it, click the **AUTH number**. From here you are able to amend quantities and remove items from the order. You are also able to reject an order.

Click the AUTH number to review order

Contact	Reference	Date	Document No.	Goods	Department	Authorise
Chris Williams	Chris Williams (F) Order 1234	09/12/2016	AUTH00193974	£1.05	Marketing	<input type="checkbox"/>

Check this box and click Authorise Selected to proceed without reviewing

Authorise Selected

You are able to authorise multiple orders without reviewing them by checking the relevant tick boxes and clicking **Authorise Selected**.

- ▶ To add a line reference, check the **Add Reference Per Line** option. A free-type box will appear beneath each line for you to populate with your reference.

Add Reference Per Line

- ▶ To assign a line to a particular department within your business, check the **Select Department Per Line** tick box. A drop-down list will appear beneath each line for you to select the relevant department.

Select Department Per Line

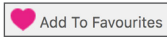
- iii. Select **Update** to confirm any changes.
- iv. Click **Checkout** to proceed to the checkout and confirm order.

FAVOURITES

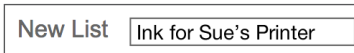
CREATING A FAVOURITES LIST

💡 *If you have products that you order regularly, it can be useful to group them together into a favourites list to save time when ordering in the future. For instance, you may wish to create a list for all the ink cartridges used within your department or for all of the different envelopes used.*

- i. Select a product that you would like to add to your list.
- ii. Click on **Add To Favourites**.



- iii. In the **New List** box, enter a name for your list, for instance Ink for Sue's Printer, Envelopes for Finance etc.

A form with the text "New List" followed by a text input field containing "Ink for Sue's Printer".

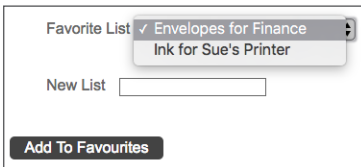
- iv. Click **Add To Favourites** and a screen showing all your lists will appear.
 - ▶ Click **Edit** to change the name of the list.
 - ▶ Click **Delete** to delete the list.

Favourite	
Envelopes for Finance	Edit Delete
Ink for Sue's Printer	Edit Delete

- v. To view all products on the list, click on the list name.

WORKING WITH MULTIPLE LISTS

- i. Select a product and click **Add To Favourites**.
- ii. From the drop-down list, select the list you would like to add to.

A form with a dropdown menu labeled "Favorite List" showing "Envelopes for Finance" selected and "Ink for Sue's Printer" as an option. Below it is a "New List" text input field and an "Add To Favourites" button.

ORDERING FROM A FAVOURITES LIST

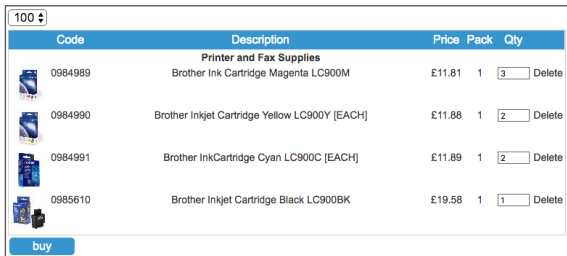
- i. Click **Favourites** from the top menu bar.



- ii. Select the list you wish to order from by clicking on the list name.

Favourite		
Envelopes for Finance		Edit Delete
Ink for Sue's Printer		Edit Delete

- iii. Enter desired quantities for each product you require.



A table showing a list of products under the heading 'Printer and Fax Supplies'. The table has columns for Code, Description, Price, Pack, and Qty. Each row includes a quantity input field and a 'Delete' link. A 'buy' button is located at the bottom left of the table.

Code	Description	Price	Pack	Qty
0984989	Brother Ink Cartridge Magenta LC900M	£11.81	1	<input type="text" value="3"/> Delete
0984990	Brother Inkjet Cartridge Yellow LC900Y [EACH]	£11.88	1	<input type="text" value="2"/> Delete
0984991	Brother InkCartridge Cyan LC900C [EACH]	£11.89	1	<input type="text" value="2"/> Delete
0985610	Brother Inkjet Cartridge Black LC900BK	£19.58	1	<input type="text" value="1"/> Delete

buy

- iv. Click **Buy** and the products will be added to your basket.

INK & TONER FINDER

FINDING THE CORRECT INK & TONER

- i. Click on the **Ink & Toner Finder** icon from the sidebar or the **Toner Finder** tab in the top menu bar.



- ii. Select the details of your printer from the drop-down lists.

Brand	<input type="text" value="BROTHER"/>
Machine	<input type="text" value="Inkjet Printer"/>
Model	<input type="text" value="DCP-120C"/>
Type	<input type="text" value="Original"/>

- iii. The results will appear when all fields are complete.

CONTRACT LISTS

TYPES OF LIST ON CONTRACT

- **Green List**

This is the set contracted list agreed between your procurement team and Clares. The volume of sales for each product have been specified and can be adjusted dependent on use. This list includes general office supplies such as pens and paper trays.

- **Toner List**

This is the set list for printers, multi-function devices (MFDs) and fax machines. You can purchase these on an ad-hoc basis or they may be included as part of a set-contract. If your toner is not on the list, check on the Amber List.

- **Amber List**

This is a list of chargeable items that are procured on a transactional basis. These may be one-off purchases or expensive items. This list includes anything not on the Green List such as batteries and toner that isn't included on the Toner List.

💡 *The above lists are available on the **Contracts** tab on your log-in page.*

I NEED SOMETHING ELSE

If you need something that is not on any of the above lists, off-contract requests can be made on a 'critical needs' basis:

- ▶ These requests will carry extra charges and are subject to approval by your procurement team.
- ▶ As a general rule, off-contract items should not be requested.
- ▶ If your approving manager deems there is a critical operational need, please contact Clares for a quote.

! *If there is a critical ongoing need for a particular product that is not on either the Green or Amber List, please contact Clares. We will work the Trust's procurement team to see which list it should be added to.*

FREQUENTLY ASKED QUESTIONS

I've forgotten my password

- i. At the log-in screen, enter your email address in the **Email/Username** box
- ii. Click the **Forgotten Password?** link
- iii. An email will be sent to your with a link to follow to the password reset screen
- iv. Enter and confirm your chosen password
 - ! *Your new password must contain: at least one letter; at least one capital letter; at least one number and be at least 8 characters long.*

How do I change my password?

- i. Once logged in, click the **Change Password** link
- ii. Enter your new password and click **Accept**
 - ! *Your new password must contain: at least one letter; at least one capital letter; at least one number and be at least 8 characters long.*

What does the Thumbs Up icon denote?

The **Thumbs Up** icon denotes a product that is on your contract list

What is Fast Order?

The Fast Order screen allows up to 20 products to be ordered without having to look through your contract list or browse categories.

- i. Click the **Fast Order** option in the top menu bar
- ii. Enter the product code of the item in left hand box and the required quantity into the right hand box
- iii. Repeat step iv as necessary
- iv. Click **Add All To Cart** to add everything to your shopping basket

Are 'Green' products available to order?

You can browse all the green products that have been made available to you by clicking the **Eco Products** link in the top menu bar.

Am I able to see my previous orders?

- i. Click **Accounts** in the top menu bar
- ii. Select the **History** option
- iii. You will be shown all the orders you've placed within the last month. Check the **Show All** box to see all orders
- iv. Click on the **SORD** document number to view the products that were on the order

Where can I see my most frequently ordered products?

- i. Click on **Accounts** in the top menu bar
- ii. Select **Top 50** to see the items that have been bought the most in the last 400 days

How do I go back into a saved order?

If you have any saved orders you will see them listed in the **Saved Orders** box, just above the Shopping Cart on the right hand side. To continue adding products to this order:

- i. Bring the order up by clicking on the **SAVE** number
- ii. Click **Add All To Cart** to place all the items into your shopping basket. You'll then be able to add further products as per normal

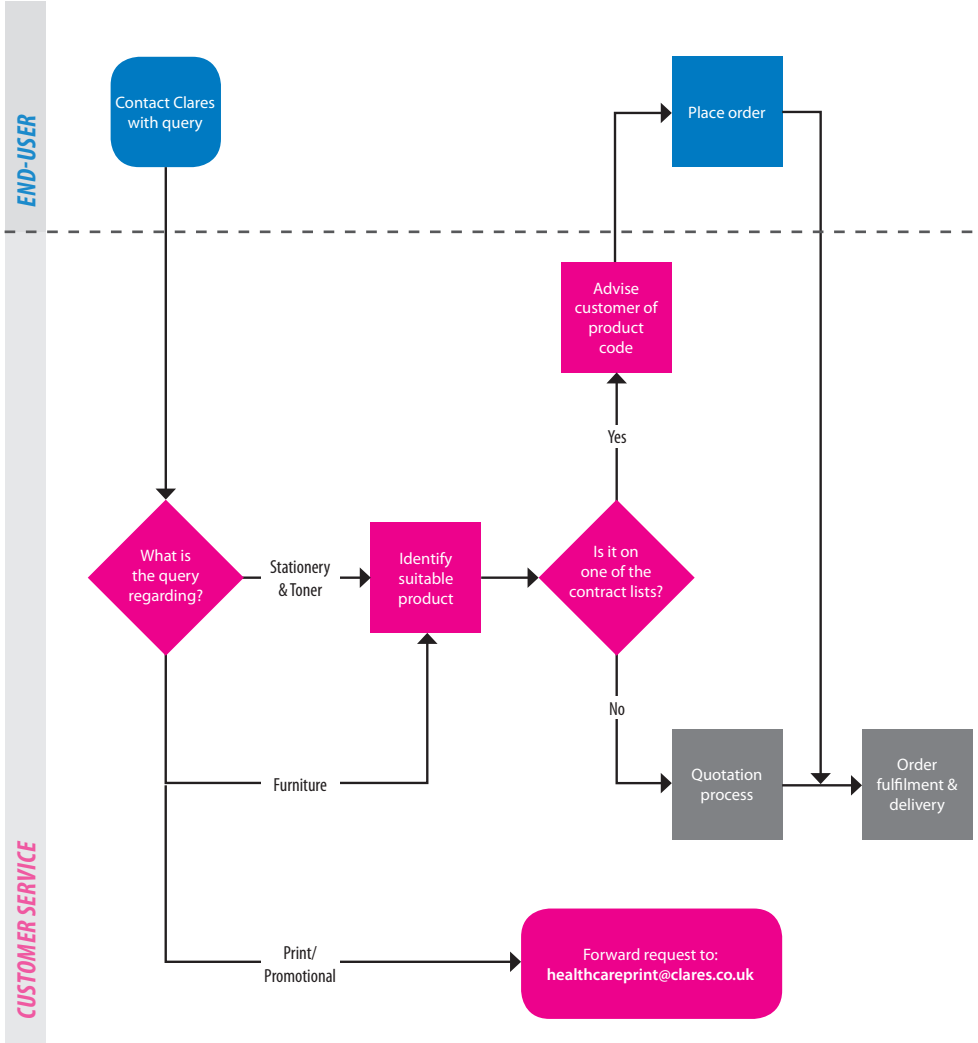
What is the returns process?

Raise queries directly with our Customer Service team within five days of receipt

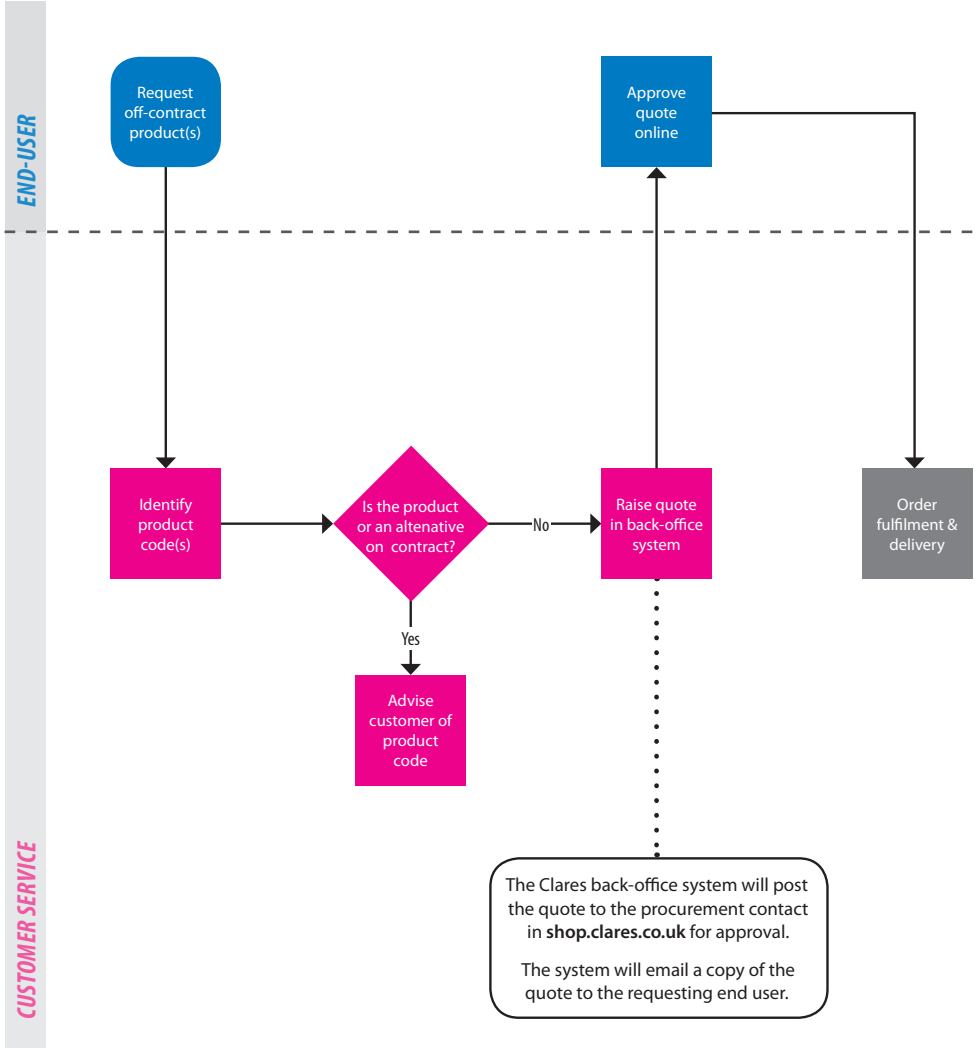
- ! *Unless a product is faulty or damaged, it may not be accepted for return outside of the five day window*

OPTIMISED PROCESSES

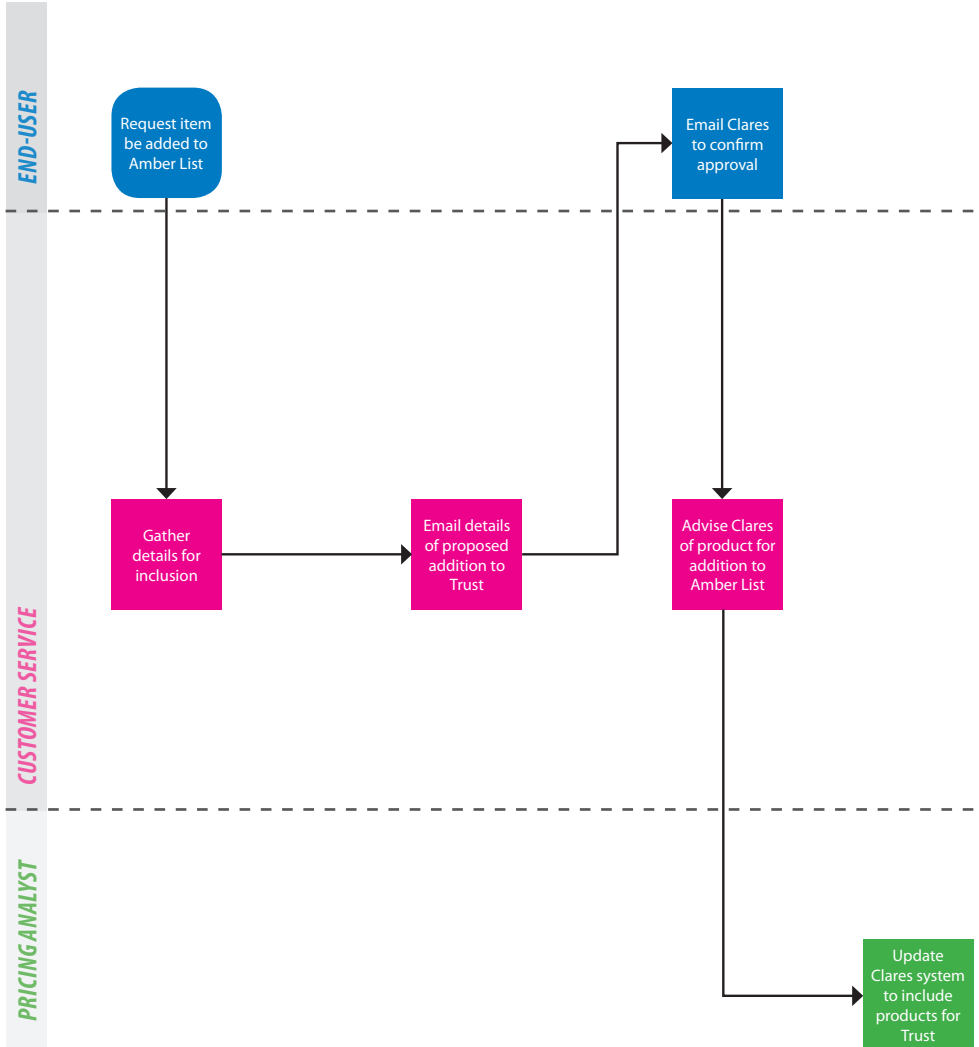
CUSTOMER ENQUIRY PROCESS



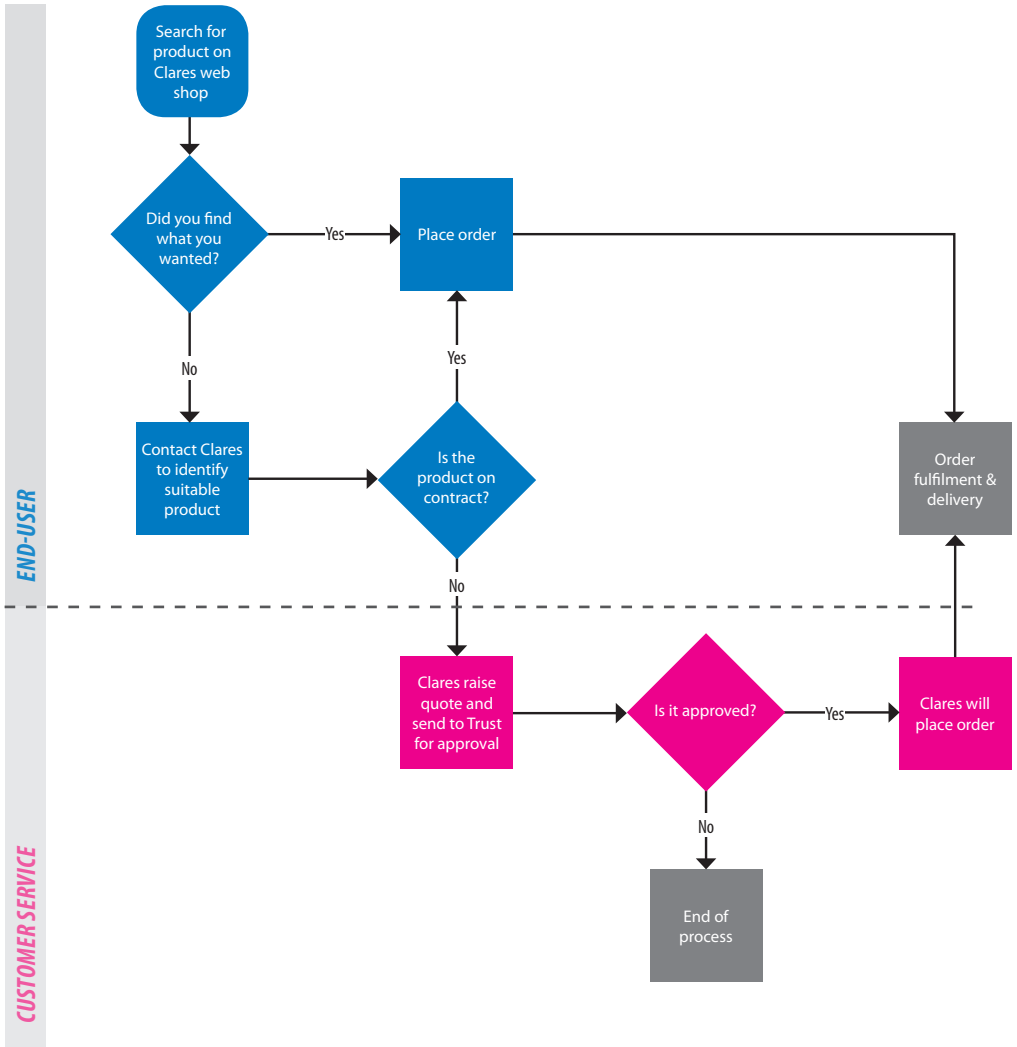
QUOTATION PROCESS



ADDITIONS TO AMBER LIST PROCESS



ONLINE ORDERING PROCESS





ClaresTM

Unit D1 Voyager Park | Portfield Road | Portsmouth | PO3 5FN

Tel: 0845 68 68 000 | Email: sales@clares.co.uk