1. Introduction

This feature became available in workSmart! Territory Manager with version 4.4.4.7, released January 17, 2013.

This overview describes the method for requesting purchase orders from hospitals. An email is sent to the customer accounting contact, with a link to a temporary web page that allows the hospital accounting contact to enter the purchase order for the customer.

The purpose of the function is to send a PO number request directly to the individual or department that provides this information for the facility. The method gives that account a timely notice of the request, a secure portal to provide the information, and a contact directly to the agency if there are any problems with the order.

The agency benefits from speeding up PO collections and cash flow, centralizing important account purchasing information, and providing an automation resource to the field sales organization to make them more efficient.

1.1 Overview

- The function will send a PO request directly to the purchasing department of an account once configured.
- The method gives the account a timely notice for the PO collection.
- The system provides a secure portal for PO submission directly to the agents system.
- The agency speeds up PO collections.
- The agency centralizes important account information.
- Sales representatives get an additional resource to help collect PO numbers.

1.2 Things to note.

- The Request PO pop up box displays the destination email address. This allows the user to confirm the customer accounting email addresses before the PO Request email is sent. This request email is formatted to be compatible with text only email readers.
- Order PO Request emails to the customer are recorded in the order history to show when the request is sent, along with the destination email address. When the customer updates the order with the purchase order number, the order history also shows the update.
- On the secure web page that customers can use to add the purchase order to an order, a link is now available to show the PDF version of the order. This will allow the hospital to save a copy of the order for their records.
- If the customer's sales rep is configured with their email address, a PO Request email sent to the customer will have the sales rep's email address as the sender's address. The PO Request email will appear to have been sent from the sales rep.
1.3 What about HIPAA?

In accordance with HIPAA regulations, the PO request email is transmitted via secure encryption (TSL/SSL). The temporary web page included in the email can only be accessed via a secure encrypted link from the hospital user's web browser. The use of secure encrypted links is the default operation.

2. Configuration Requirements:

You will need the sales people to get the appropriate email address for the department or the individual that will complete the submission of the request at the facility.

All of the contact data for the individual or department should be stored in a contact list or other database for future use.

The input for this data will need to be made through the Web application for Mobile Workforce.

A formal notice from the agency or the sales representative to make sure the account will be expecting the request from the system and know the form used for the request.

Make sure the account is expecting the email in the form it will be received.

2.1 Sales Rep Configuration

The sales rep's email address will need to be recorded in workSmart! as part of the sales rep's user account configuration. With the sales rep's email address defined, the PO Request will show as coming from the sales rep. Otherwise the Distributor/Agency email address will be the sender's address.

The distributor administrator can update the user account information to include the email address.
2.2 Customer Configuration

The customer accounting contact information includes a field for the Accounting contact Email. This will be the email address to which the PO Request email is sent. To update the email address, select the Customer [View] link, then Filter Customers. Use the filter options to select the customer if possible.

<table>
<thead>
<tr>
<th>Account</th>
<th>Add</th>
<th>View all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales representative</td>
<td>Add</td>
<td>View all</td>
</tr>
<tr>
<td>Customer</td>
<td>Add</td>
<td>View</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Add</td>
<td>View all</td>
</tr>
<tr>
<td>Distributor</td>
<td>Add</td>
<td>Surgeon Details</td>
</tr>
</tbody>
</table>

Filtered Customers

<table>
<thead>
<tr>
<th>Customer (Assigned Id)</th>
<th>Sales Rep Name</th>
<th>Office</th>
<th>Manufacturer (contracts)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care Clinic (mwf0011)</td>
<td>Lynn Lewis</td>
<td>Port Orchard</td>
<td>MWF Manufacturing</td>
</tr>
<tr>
<td>Bay Street Hospital (mwf0003)</td>
<td>Pat Smith</td>
<td>Port Orchard</td>
<td>MWF Manufacturing - contracts</td>
</tr>
<tr>
<td>Dublin Hospital (no assigned id)</td>
<td>Terry Jones</td>
<td>MWF Manufacturing</td>
<td></td>
</tr>
<tr>
<td>Regional Hospital (mwf0001)</td>
<td>Terry Jones</td>
<td>MWF Manufacturing</td>
<td></td>
</tr>
<tr>
<td>This is a test customer (MWF321)</td>
<td>Frank Burns</td>
<td>Harbor Office</td>
<td>MWF Manufacturing - contracts</td>
</tr>
</tbody>
</table>

Click on the customer name to view the customer details.

<table>
<thead>
<tr>
<th>Customer (Assigned Id)</th>
<th>Sales Rep Name</th>
<th>Office</th>
<th>Manufacturer (contracts)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory Care Clinic (mwf0011)</td>
<td>Lynn Lewis</td>
<td>Port Orchard</td>
<td>MWF Manufacturing</td>
</tr>
</tbody>
</table>

After confirming the customer is correct, click on **Edit** link to edit the customer details.
Update the Accounting Email(s) address.

Save the changes.
3. The Process

View orders in the order inbox.

Suggestion: Use the order filters to identify the orders missing purchase order numbers. Select those orders with no purchase order and Filter.

View the order Inbox. Those orders without a purchase order number are flagged with a warning symbol.

3.1 Sending the PO Request

Look for the envelope icon in the PO# column. Click on the email icon.
A confirmation window will show up. This shows the destination email address that the PO Request will be sent to.

Click on Confirm, and the PO Request email will be sent to the hospital accounting contact.

To avoid duplicate emails, an alert is shown if a PO Request email for this order has been already sent. The user can choose to resubmit if needed.
3.2 Email Sent to the Hospital

Below is an example of the email submitted to the hospital accounting contact. The email contains agency contact information, case information, and the temporary link to the order so that the hospital contact can directly update the order with the purchase order number.

```
From: support@mobile-workforce.com [mailto:support@mobile-workforce.com]
Sent: Friday, December 12, 2014 10:42 AM
To: 
Subject: MWF Distributor is requesting PO information. W0952148866C1818 09/17/2014

This request for purchase order information is being sent by Mobile Workforce workSmarts on behalf of MWF Distributor.

Simply click on the secure link below or copy and paste the url into your web browser address bar and press enter. This will bring you to a webpage that will allow you to enter and save the PO number.

http://10.10.10.51/orderPD/cf64335e-4a1c-4a20-89ba-b776a72d4031/assignPDFforOrder.spx

Please contact support@mobile-workforce.com if you have any questions about this secure service provided to you and MWF Distributor by Mobile Workforce Inc.

Contact Information
MWF Distributor
Sales Representative: Terry Jones
360-874-2424
support@mobile-workforce.com
2501 Milk Hill Road
Port Orchard WA 98366

Order Details
Date 09/17/2014
Manufacturer MWF Manufacturing
Order Number W0952148866C1818
Patient
Surgeon
Procedure Type
Case/Delivery Date

CONFIDENTIAL COMMUNICATION - This communication constitutes an electronic communication within the meaning of the Electronic Communications Privacy Act, 18 U.S.C. Section 2510, and its disclosure is strictly limited to the recipient intended by the sender.

The information contained in this email may be confidential and/or legally privileged. If the reader of this message is not an intended recipient, you are hereby notified that any unauthorized review, use, disclosure, dissemination, distribution, or copying of this communication, or any of its contents, is strictly prohibited.

While it is believed that this email does not contain any viruses or defects that might affect the computer system into which it is received, it is the responsibility of the recipient to ensure that it is virus free and no responsibility is accepted by Mobile Workforce and its subsidiaries and affiliates for any loss or damage resulting from its use.

If you have received this communication in error or have any questions, please contact the sender by reply email and destroy all copies of the original message.
```
3.3 Secure Web Page for the Customer to add the PO

The secure web page that the hospital accounting contact is directed to appears as below. The spot for the Purchase Order is clearly identified.

3.4 Saving the Purchase Order

After entering the purchase number and clicking on the SAVE button, the prompt will be updated. The user can then simply close the browser window.
4. **Recommendations for the Distributor or Agency:**

Create a standard policy for sending the template for agency rules for sending the notice: timing of the notice, account specific issues, and any agency operational issues.

Example Policy

1. The first notice will be sent to the accounts one week after the case is invoiced in the MWF system.
2. Subsequent notices will be sent each week following the first notice.
3. After three notices (four weeks aging), or in the last week of the month, the sales representative for the account is notified for followup.