

# WebConnect User Guide

## Trading Account Administrator

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# 1

IN THIS SECTION

**W**ebConnect

**Getting Started**

## Logging On

The first step is to Logon to WebConnect

- 1 Go to <https://shop.bunzlhealthcare.com>
- 2 Enter your email address and password
- 3 Click on Login



- 4 As the Trading Account Administrator, your email address can be linked to more than one account. Select the account you wish to use from the Account drop down list which is located above the search bar on the right hand side



## Forgotten Passwords

If you have forgotten your password you will need to follow these simple steps and you will be send a new password via email.

- 1 If you have forgotten your password, click on the link below the login button



2 Enter your email address and click Continue

**Forgotten Password**

2 Enter your account's email address and then the answer to your security question to be emailed a new password.

Email Address

3 If you have logged in before and set up your security question, WebConnect will now ask you to answer that question.

**Forgotten Password**

Enter your account's email address and then the answer to your security question to be emailed a new password.

Security Question

Answer

3

4 If you have not set up your security question, you will be directed to the final screen which tells you that your new password has been sent to you via email

**Forgotten Password**

New Password Emailed 4

Your password has been reset and you have been sent an email with your new login details.

6

5 Once you have received the forgotten password by email, you can login and reset your password to one that you will remember.

6 Click on Return to go back to the Login screen

**Tip:** It is highly recommended that you enter a security question when you login to WebConnect for the first time.

## Changing Your Password

The first step is to log into WebConnect

1 When you have logged into WebConnect, click on My Account, located at the top right hand of the toolbar.

2 Click on the Details tab and scroll down to the Change Password section

3 Enter new password and confirm it in the box below

4 Click Save

Bunzl - User Account Properties

Shop | Orders | **My Account** | Logout

deeps.vaid@bunzl.co.uk  
Last logged in: 30/08/2011 16:21:20

Account: Four Seasons Healthcare Ltd (Deeps Vaid)

Complete Healthcare Supply Chain Solutions

Shop Search

Currently Editing Account: Four Seasons Healthcare Ltd - Deeps Vaid

Summary | **Details** | Users | Addresses | Configuration

### Change Password

New Password

Confirm

Security Question

Answer

(The security question and answer above are used by the 'forgotten password' page.)

### Permissions

Trading Account Administrator?

## Setting Your Security Question

1 The option to set up your security question is also under the Details tab under My Account

2 The security question drop down list displays the 3 questions that you can choose from. Select one and enter the answer in the box below

3 Click Save

### Change Password

New Password

Confirm

Security Question

Answer

(The security question and answer above are used by the 'forgotten password' page.)

### Permissions

Trading Account Administrator?

## IN THIS SECTION

## My Account

**T**his section explains the functionality available under the My Account section in WebConnect

## Account Summary

The summary screen is the homepage for Trading Account Administrators. This page will be displayed when you first log in. You are able to navigate to all the required screens from this page.

- 1 This screen shows a summary of the account details, users and an audit log
- 2 The audit log is fully searchable. It shows all recent activity on the trading account.
- 3 The boxes at the side of the audit log show summary information about the account and users
- 4 Click on the More button to view the full details
- 5 The links across the top left of the page link to other option screens

Bunzl - Account Summary

Shop | Orders | My Account | Logout  
 deepa.vaid@bunzl.co.uk  
 Last logged in: 01/09/2011 09:28:58  
 Account: [Account ID]

Complete Healthcare Supply Chain Solutions

Shop Search [5] [Go] [3 Items] [KTY-48] [Favorites]

Summary | Details | Users | Addresses | Configuration

**Account Details**  
 Four Seasons Healthcare Ltd  
 Elmston Court  
 Abberley Road  
 Wilmshurst  
 Cheshire  
 SK9 1NK  
 England  
 More

**Audit Log**  
 Search [ ] [Go] [Reset]

ID	Time	User Name	Description
1	01/09/11 14:19	Deepa Vaid	System Login
1	01/09/11 13:19	Daniel Sandvig	System Login
1	01/09/11 13:19	Daniel Sandvig	System Login
1	01/09/11 12:50	Carmelita Care Home	System Login
1	01/09/11 12:35	Rev David Morris	System Login
1	01/09/11 12:34	David Morris	System Login
1	01/09/11 12:10	Daniel Sandvig	System Login
1	01/09/11 11:17	Clarekebyre Care Home	System Login
1	01/09/11 10:09	Bangor Care Home	System Login
1	01/09/11 09:39	Daniel Sandvig	System Login
1	01/09/11 09:38	Daniel Sandvig	System Login
1	01/09/11 09:37	Matt Turner_GHX	System Login
1	01/09/11 09:20	Deepa Vaid	System Login
1	01/09/11 09:11	Oxbridge Care Home	System Login
1	01/09/11 09:01	Strangford Court Care Home	System Login
1	01/09/11 09:38	David Morris	System Login
1	01/09/11 14:45	Deepa Vaid	System Login
1	01/09/11 14:13	Emma Thompson	System Login
1	31/08/11 13:01	Abberley Care Home	System Login

**Account Users**  
 Home  
 1 Abberley Care Home  
 1 Andy Lamasack  
 1 Andy Tice  
 1 Annahill Care Home  
 1 Acton Care Home  
 1 Acton Care Home  
 1 Ardleigh Care Home  
 1 Ashgrove Care Home  
 1 Bangor Care Home  
 1 Baxman Inn  
 More

## Account Details

The Details Screen displays the contact details for the Trading Account Administrator and the preferences that have been set against the account.

- 1 The Details Screen consists of 4 sections; contact details, preferences, change passwords and permissions.
- 2 The contact details section displays the contact details of the user who is logged in. If a user's email is used for more than one account there is an option to set the account as Default
- 3 In the Preferences section, you can set the number of rows you wish to display on each page. The recommended value is 25 rows per page. Do not set this value higher than 100.
- 4 You can also set a default cost centre. This would mean that orders raised will be attributed to that cost centre.
- 5 The Change Password section was explained earlier.
- 6 Under the Permissions section you can set the user to be Trading Account Administrator by ticking the box.
- 7 You can regenerate the password for the user who is logged in by clicking on this button. You may need to do this if a user has forgotten their password and has not set a security question.
- 8 You are able to lock the user account. You may need to do this if the account is not being used, instead of deleting the account.
- 9 If you click on the Cancel button, this will take you back to the Summary screen
- 10 Click on the Save button to save any changes you have made
- 11 The red arrows indicate that the field is mandatory

The screenshot shows the 'Details' page for a user named Deepa Vaid. The page is divided into four main sections: Contact Details, Preferences, Change Password, and Permissions. Callouts 1-11 highlight specific features and fields as described in the text.

**Contact Details**

- Title: Ms
- Forename: Deepa
- Surname: Vaid
- Telephone No.: 07850 721898
- Fax No.:
- Email Address: deepa.vaid@bunzl.co.uk
- Default Account:

**Preferences**

- Rows Per Page: 25
- Cost Centre:
- Default Delivery Address: Warehouse Bunzl Healthcare Unit 6 George House
- Default Invoice Address: Bunzl Healthcare Unit 6 George House EN3 7QJ

**Change Password**

- New Password:
- Confirm:
- Security Question: What is your birth town/city?
- Answer: Northampton

**Permissions**

- Trading Account Administrator?


Buttons at the bottom: Save, Cancel, Lock, Regenerate Password, Delete.

Tip: Rows per Page – The recommended value is 25 rows per page. Do not set this value higher than 100.

Tip: Deleting Accounts – Try and use the Lock function instead of deleting accounts if you think that you may need to use it in the future. Locking an account will deactivate it so that users cannot log in.

## Users

Within the trading account, you can configure users who can access that Trading Account.

- 1 The Users screen displays a list of users that are set up for that trading account. The list shows the users name and contact details
- 2 Click on the  icon to take you into the users Details screen
- 3 From this screen, you can edit the user details, including the contact details and user passwords, as explained on the previous page (Account Details)
- 4 When a user account is locked, a lock icon will be displayed next to the user name on the main user screen. If the account is already locked, there will be an un-lock button displayed.
- 5 If you change the email address of the user, an error will be displayed asking if you wish to change the email address for all associated accounts.
- 6 Click the Save button to save changes, or press Cancel to return to the Summary screen.

The screenshot shows the BUNZL healthcare web interface. At the top right, there are navigation links for 'Shop', 'Orders', 'My Account', and 'Logout'. The user is logged in as 'deepa.vaik@bunzl.co.uk' on 01/09/2011 at 14:18:45. The main header displays 'Complete Healthcare Supply Chain Solutions' and a shopping cart with 3 items worth £16.48. The 'Users' screen shows a table of user accounts for the trading account 'Four Seasons Healthcare Ltd - Melanie Bowden'. The table has columns for 'Account Name', 'Telephone No', and 'Email Address'. One user, 'Andy Lama', is highlighted with a red circle and a '1' callout. Below the table, there is a 'New User' button. The 'Details' screen for a user shows 'Contact Details' and 'Preferences'. The 'Contact Details' section includes fields for Title, Forename, Surname, Telephone No., Fax No., and Email Address. The 'Preferences' section includes 'Rows Per Page' (set to 25), 'Cost Centre', 'Default Delivery Address', and 'Default Invoice Address'. The 'Change Password' section has fields for 'New Password', 'Confirm', and 'Security Question' with an 'Answer' field. At the bottom, there are buttons for 'Save', 'Cancel', 'Lock', 'Regenerate Password', and 'Delete'. A '6' callout points to the 'Save' button.

Account Name	Telephone No	Email Address
Abeyards Case Home	028 91 84452	abeyards@bunzl.co.uk
Andy Lama	0181 849 4006	Andy.Lama@bunzl.co.uk
Andy Tice	07767 290 811	andy.tice@bunzl.co.uk
Annahil Co	028 91 83698	annahil@bunzl.co.uk

## Users – Creating a New User

As a Trading Account Administrator you have the ability to create, delete and lock user accounts.


- 1 To create a new user, click on the New User button on the Users screen
- 2 Fill out all the user details. A red arrow indicates mandatory fields
- 3 Under the Contact details section, there is an option to set this account as the default account – tick the box. This can be used if the user has multiple accounts linked to the same email address. The default account will be displayed when you log in.
- 4 Under the Preferences section, you will need to fill out the rows per page. It is recommended that you set this to 25.
- 5 Under the Permissions section, you can set the Approval Cost Centre for that user
- 6 Also, under the Permissions section, you will need to select the Approval Level for this user – there are 3 options –
  1. None – the user has no approval permissions
  2. View – the user can view approvals
  3. View & Approve – user able to view approvals and also approve orders themselves
- 7 To make the user the Trading Account Administrator, tick the box. The trading account administrator has the same authority as the Trading Account Owner

The screenshot shows the 'New User' creation interface. At the top, there is a navigation bar with 'Shop', 'Orders', 'My Account', and 'Logout'. Below this is a search bar and a 'Go' button. The main content area is divided into three sections:

- Contact Details:** Contains fields for Title, Forename, Surname, Telephone No., Fax No., and Email Address. A 'Default Account' checkbox is present. A red circle '1' highlights the 'New User' button in the top right corner.
- Preferences:** Contains a 'Rows Per Page' dropdown menu (highlighted with a red circle '4') and two 'Default Address' fields (Default Delivery Address and Default Invoice Address).
- Permissions:** Contains an 'Order Approval' dropdown menu (highlighted with a red circle '6'), an 'Approval Cost Centre' dropdown menu (highlighted with a red circle '5'), and a 'Trading Account Administrator?' checkbox (highlighted with a red circle '7').

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

8 When a user account is first created, it is locked (indicated by the lock icon)











9 To activate the account, click on the  icon next to the user name

10 In the properties of the user message will be displayed informing you that the account has been locked

11 To unlock the account, click the Unlock button

12 If the user has forgotten or lost their password before they have first logged in, you can select Unlock & Generate New Password. This will unlock the account and a new password will be emailed to the user

13 When an account has been unlocked, the buttons in the user properties will change. You will now have the option to Lock the account and another option to Regenerate the Password. You should only need to regenerate a password if the user has forgotten their password and did not set a security question.

User Accounts For This Trading Account			
		Contact Name	Telephone No
		Darren Fowles	01842 762141
		Test test	0101001
		 Testing Test	01234 567893
		 Sky Keating	01842 765375

[New User](#)

This account has been locked by a trading account administrator. 10

**Contact Details**

Title:

Forename:

Surname:

Telephone No.:

Fax No.:

Email Address:

Default Account:

**Preferences**

Rows Per Page:

Cost Centre:

**Permissions**

Trading Account Administrator?

[Save](#) [Cancel](#) [Unlock](#) [Unlock & Generate New Password](#) [Delete](#)

Rows Per Page:

Cost Centre:


**Permissions**

Trading Account Administrator?

[Save](#) [Cancel](#) [Lock](#) [Regenerate Password](#) [Delete](#)








## Addresses

The Addresses screen displays two types of address: Delivery address and Invoice address.

- 1 The addresses are coloured by type of address; Delivery addresses are shown in orange, and Invoice addresses in green
- 2 If you click on the  icon, this will take you into the address details
- 3 The red arrow indicates a mandatory field
- 4 There is an option to Lock the address so that it can no longer be used
- 5 When an address has been locked, a lock icon will be displayed next to the address
- 6 If you would like to delete the address click on the Bin icon next to it

Summary | Details | Users | **Addresses** | Configuration

Key: Delivery Address Invoice Address

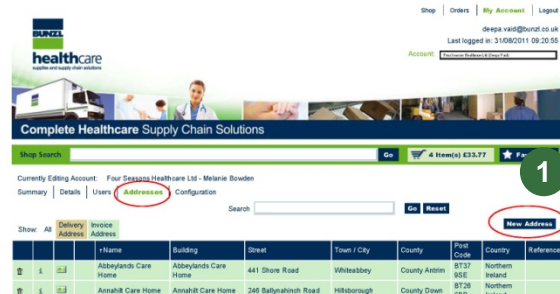
				Name	Building	Street	T
				test	test		te
				Company	The Building	Test Street	C
				test	test	test	te

[New Address](#)

## Assigning a New Address

If the address you require is not listed then add a new one by clicking on the New Address button.

- 1 Click on the New Addresses button
- 2 Select the Address Type from the drop down menu
- 3 Enter all the address details. The red arrow indicates a mandatory field
- 4 If you do not have a Transfer Point, enter in a number, as this field is mandatory
- 5 Click Save



Summary | Details | Users | **Addresses** | Configuration

**Address**

Address Type:

Deliver To Name:

Building Name:

Street:

Town/City:

County:



Post Code:

Country:

Transfer Point:

## Assigning an Address to a User

Once you have created addresses, you will need to assign an address to each user. By assigning an address to a user they will be able to select it when they come to the checkout process.




- 1 Go to the Summary screen and click on Addresses
- 2 Find the address you wish to allocate and click on the 
- 3 Select the user that you wish to allocate to the address by clicking on the  icon so that it turns green
- 4 If you wish to allocate all users in the list to the same address, press the Associate to All button at the bottom of this page
- 5 Once you have finished allocating addresses, click Back to return to the Address screen. Repeat the process to allocate both Delivery and Invoice addresses.
- 6 As you have allocated an address to a user, when this user is then in the checkout process, they will be able to choose both a Delivery address and Invoice address



Delivery Address	Invoice Address	Building	Street	Town / City	County	Post Code	Country	Reference
		Abbeylands Care Home	441 Shore Road	Whiteobey	County Antrim	BT27 9SE	Northern Ireland	MD14801
		Abbeylands Care Home	246 Ballynahinch Road	Hillsborough	County Down	BT26 8BP	Northern Ireland	MD15801



Contact Name	Telephone No	Email Address
Abbeylands Care Home	028 90 86452	abbeylands@hbc.co.uk
Andy Lemanoroff	0161 848 4098	Andy.Lemanoroff@bunzl.co.uk
Andy Toor	07767 290 811	andy.toor@bunzl.co.uk

	Craugh Patrick Care Home	028 91 885363	craugh.patrick@hbc.co.uk
	Cranmore House Care Home	028 70 834464	cranmore.house@hbc.co.uk
	Jon	0161 848 4193	denise.flem@bunzl.co.uk



## Configuration

This screen consists of four sections: Trading, ID's, Order Settings, Account Approval Settings and miscellaneous Account Settings. These settings can be edited to adjust the configuration of the account.

- 1 The first section displays the Trading ID's, these cannot be edited.
- 2 Under the Order Settings, you can add a prefix to your order numbers.
- 3 Also under Order Settings, it will display the Last Order number that was used and allow you to specify a new Last Order number if you wish to change the numbering of orders.
- 4 Under the Account Approval Settings you can select whether Order Approval is required by ticking the box
- 5 The Miscellaneous Account Settings hold the default settings for VAT for items that do not have VAT codes or rates
- 6 You can also set a Contract Number. By doing this, you will restrict what data is searched, so it will only return results for the specified contract.
- 7 If you have edited any of the settings, Click Save. To return to the Summary screen, click Cancel.

The screenshot shows the 'Configuration' screen with the following sections and callouts:

- Configuration** (circled in red in the original image)
- Trading ID's**: WebConnect ID (51513), ANA NO (1), DUNS NO (59588), EAN NO.
- Order Settings**: Order Prefix (ORD), Last Order No. (00000), New Last Order No. (3).
- Account Approval Settings**: Order Approval Required (4)
- Miscellaneous Account Settings**: VAT Code (5), VAT Rate (%) (0.000000), Contract No. (6), Allow Free Form Addresses , Allow User To Change Cost Centre , Licence Type (None).
- Buttons**: Save, Cancel (7)

## IN THIS SECTION

**T**his section explains the functionality available under the Orders section in WebConnect

## Orders

## Orders

As a Trading Account Administrator you are able to see all orders for all of the user accounts on that Trading Account. To navigate to the Orders Screen, click on the Orders link in the top right hand toolbar.

- 1 The Orders screen allows you to view orders placed by users on your Trading Account
- 2 The filters section allows you to filter your results
- 3 The Trading Account will be set up automatically
- 4 You can search by an order number
- 5 You can search for orders of one particular status, e.g. Sent to Supplier
- 6 You can select which user account to search in. If you wish to search all accounts, then click on the All button, if you wish to search a particular account click on the
- 7 A list of users will be displayed. To select a user, click on the icon next to the name. There is also an option to search for the user at the top of the screen
- 8 To set a date filter on your search, tick the Date Selection box. From and To date options will be displayed. Enter the dates or click on the icon to display a calendar and select the dates from there.
- 9 To apply filters, you have to set click on the Apply filter
- 10 To Clear the filter to start a new search, click on Reset Filter
- 11 To set the page to refresh your results, tick the Auto-Refresh box, and select the number of seconds between each refresh
- 12 Once your results are displayed, if you wish to view the properties of an order, click the icon.

