

# Performance Health

## SUPPLY LIST UPDATE 2020



### SUPPLY LIST | BASICS

THE SUPPLY LIST FUNCTIONALITY IS ACCESSIBLE FOR LOGGED-IN USERS THROUGHOUT THE SHOPPING EXPERIENCE.

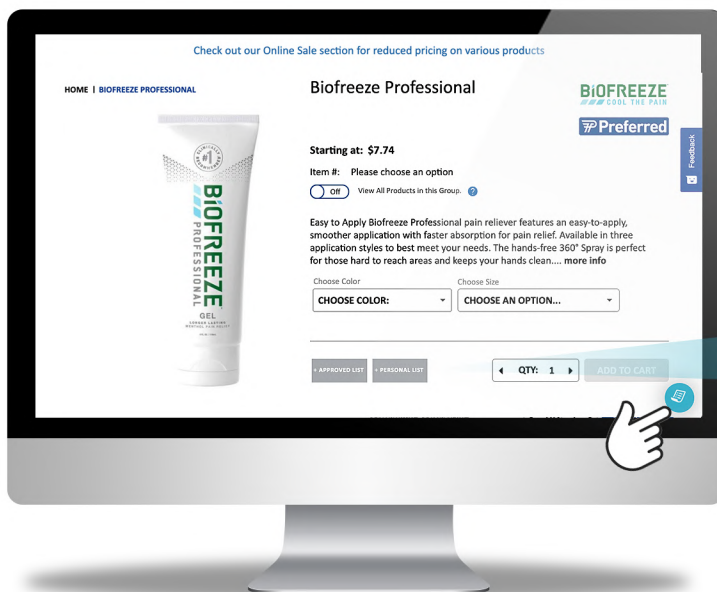
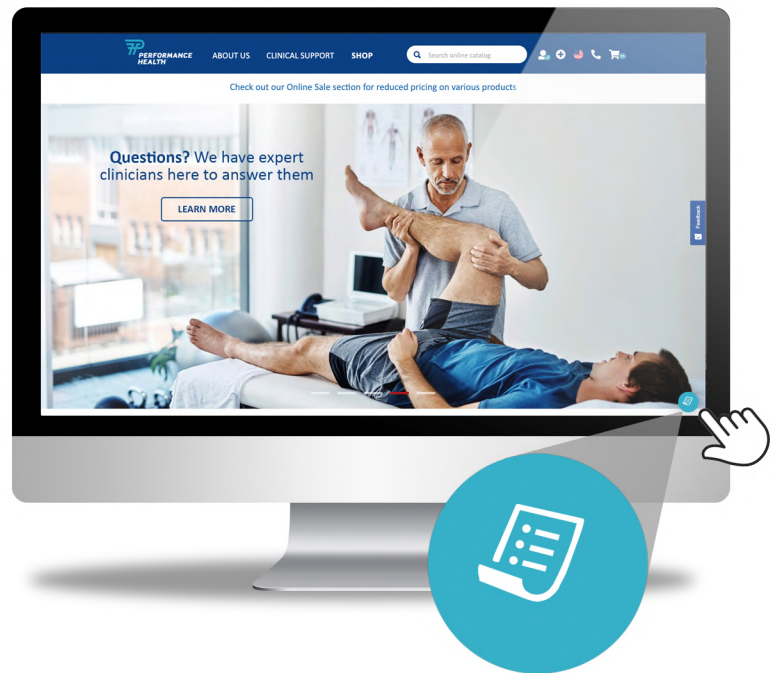
## THE SUPPLY LIST

is accessible for logged-in users throughout the shopping experience. Use a Supply List to quickly add items you already know you need.



### The new Supply List Drawer.

The new “**drawer**” supply list feature can be accessed by clicking on the icon in the lower right hand corner of the screen.



**Add products to a supply list** with the buttons on each page. Click the new Supply List Drawer icon to easily view, edit, and share product lists.

+ APPROVED LIST

+ PERSONAL LIST

www.performancehealth.ca

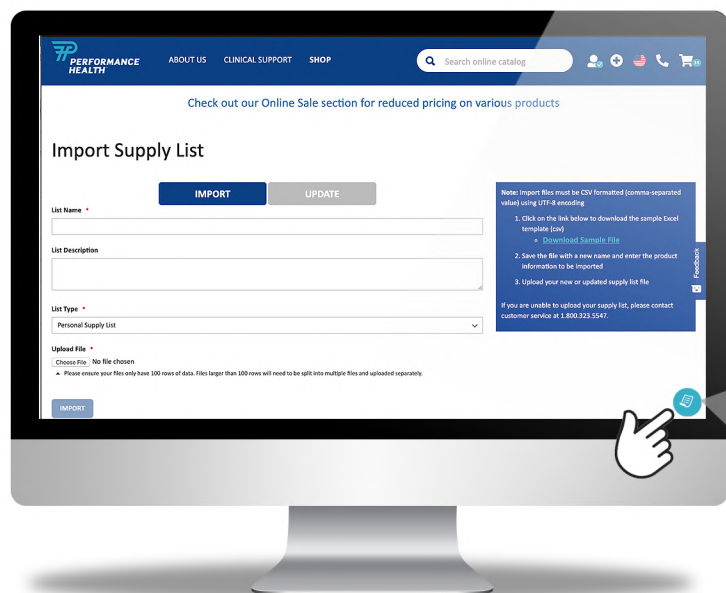
6675 Millcreek Dr, Unit 3, Mississauga, ON L5N 5M4

Customer Service: 800.665.9200 | customersupportca@performancehealth.com



# Performance Health Supply List Update 2020

## SUPPLY LIST | BASICS



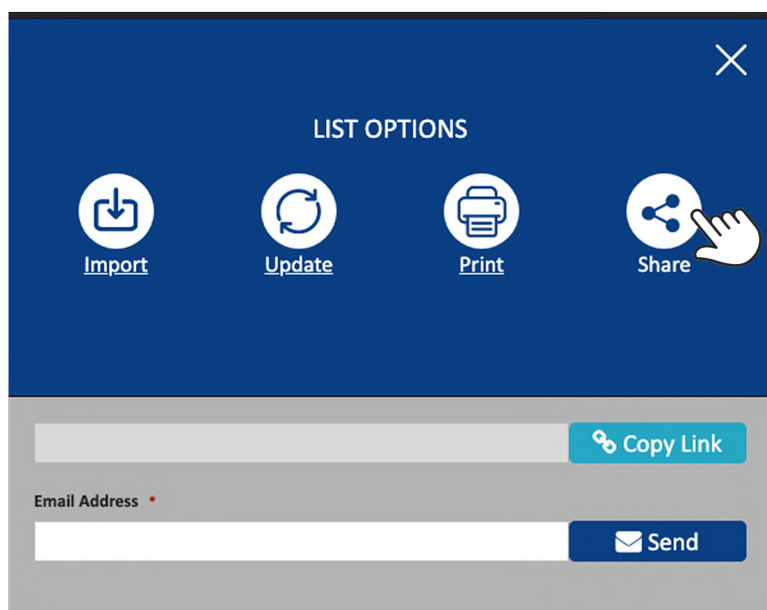
## NEW DIRECT IMPORT

You can now directly import supply lists via spreadsheet (in .csv format), allowing for existing offline supply lists to be easily brought into the online experience.



## NEW SHARING

Customers are also able to share their existing lists with others.



[www.performancehealth.ca](http://www.performancehealth.ca)

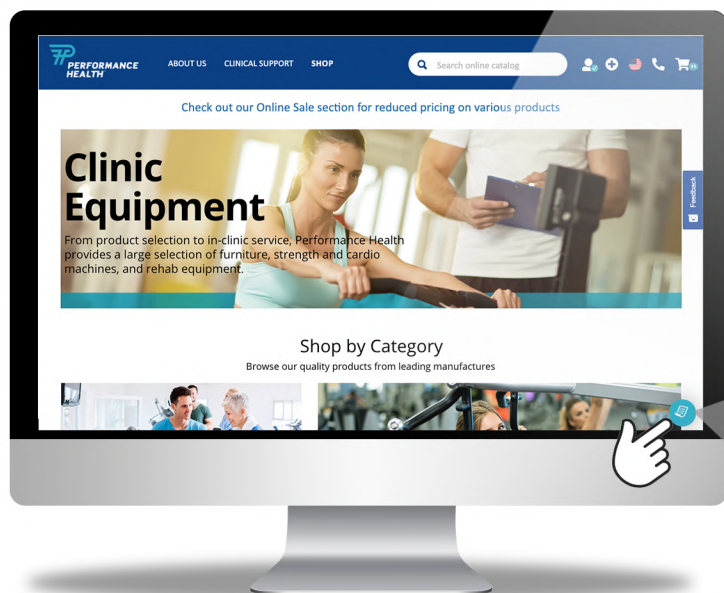
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# Performance Health Supply List Update 2020

## SUPPLY LIST | SUPPLY LIST DRAWER

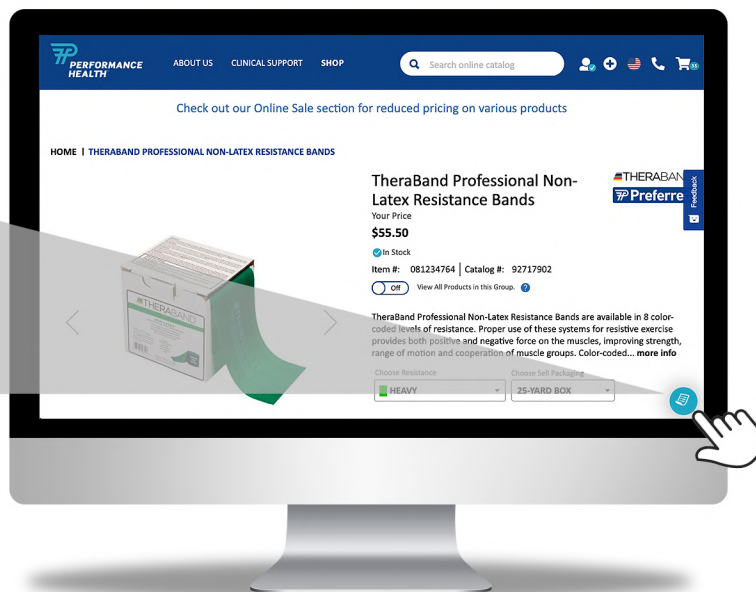


## ACCESSIBLE FROM ANY PAGE!

Your supply list is easier than ever to access!  
Visit the new Supply List Drawer **from any page**.



When you're logged into your **Performance Health account**, the blue supply list icon will be visible in the bottom right corner of every page across the website.



[www.performancehealth.ca](http://www.performancehealth.ca)

6675 Millcreek Dr, Unit 3, Mississauga, ON L5N 5M4

Customer Service: 800.665.9200 | [customersupportca@performancehealth.com](mailto:customersupportca@performancehealth.com)



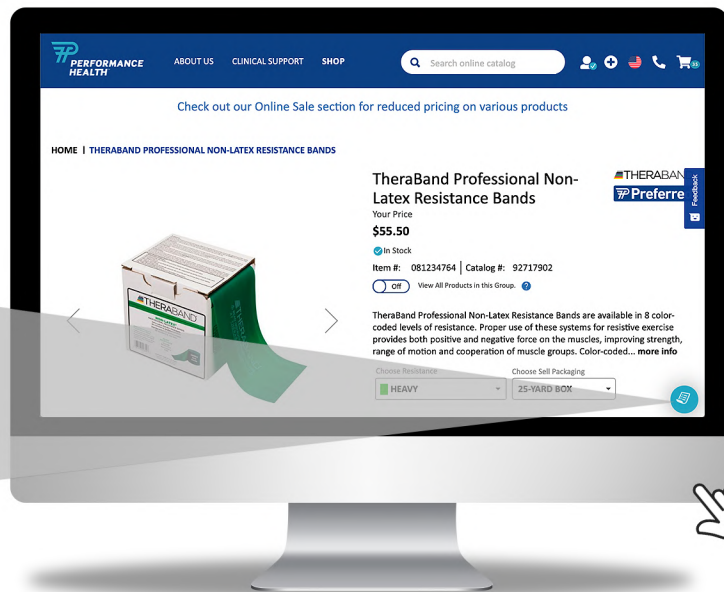


# Performance Health Supply List Update 2020

## SUPPLY LIST | SUPPLY LIST DRAWER | OPENING & CLOSING

## OPENING & CLOSING THE SUPPLY LIST DRAWER

**Clicking this icon...**  
will open the new Supply List Drawer  
to display all of your supply lists in  
one place.



**Once the drawer is open...**  
clicking the “X” will close it.





# Performance Health Supply List Update 2020

## SUPPLY LIST | NAVIGATING THE NEW SUPPLY LIST DRAWER

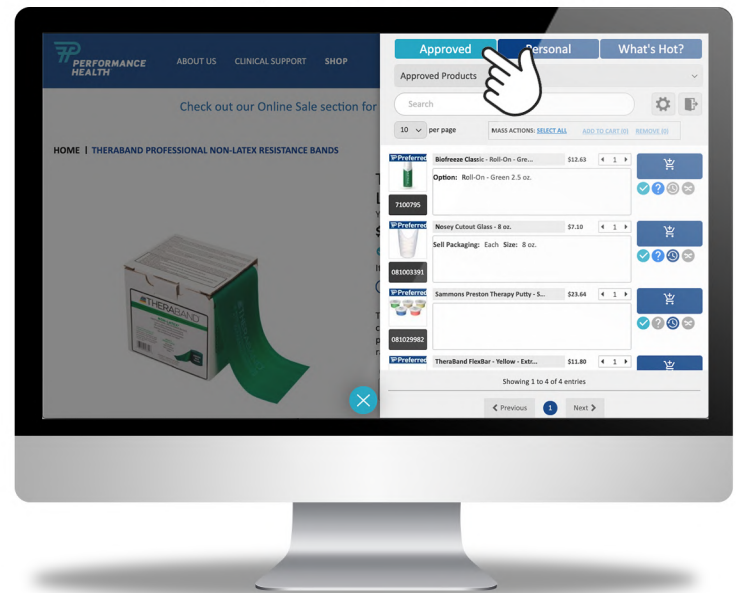
# NAVIGATING THE NEW SUPPLY LIST DRAWER

You will see a few list types at the top of your Supply List drawer.

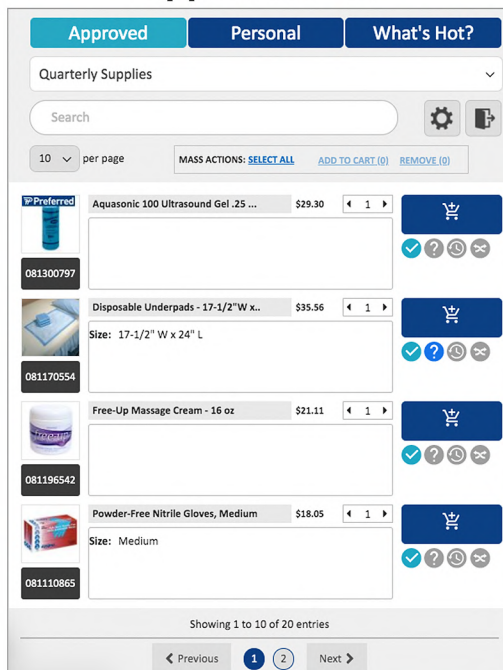
All users may quickly switch between **Personal Supply Lists** and the **What's Hot?** List.

If you log in as a company user, you will also see **Approved Supply Lists**. Your selected list type will be highlighted in light blue.

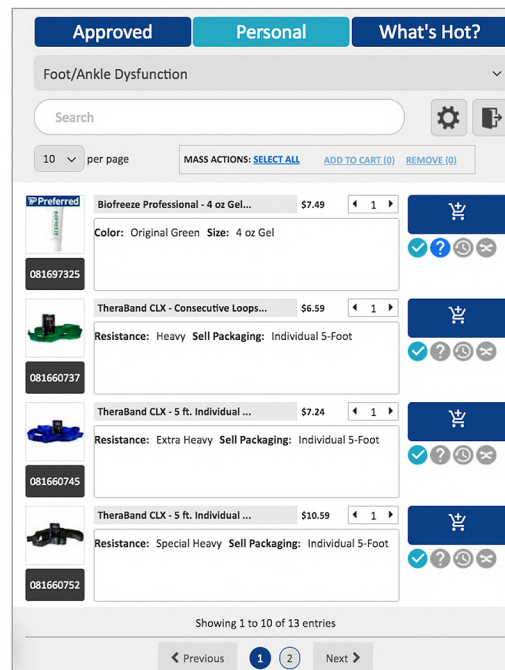
Quickly switch between lists



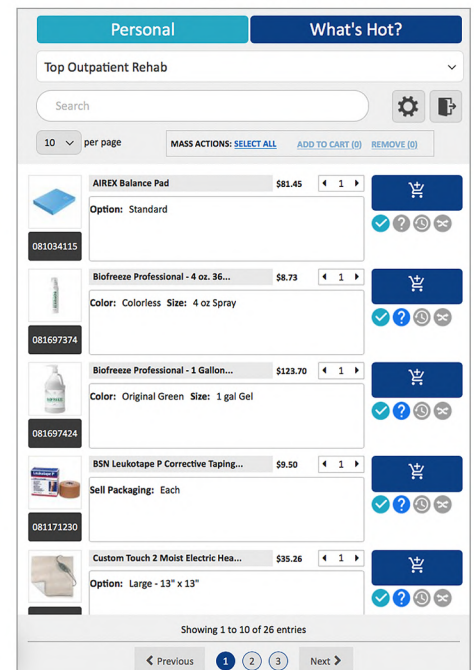
### Approved List



### Personal List



### What's Hot? List





# Performance Health Supply List Update 2020

## SUPPLY LIST | LIST TYPES

## SUPPLY LIST | LIST TYPES

### Approved List

### Personal List

### What's Hot? List

**This list will display Approved Supply Lists created by your Company's Performance Health Account Admin.**

For questions about specific products on these lists, please see your Company's Admin.

**Lists that you create will appear under Personal Lists.**

You can easily switch between different lists using the dropdown menu.

**Supply Lists created by us just for you!**

See Performance Health's newest additions and carefully curated lists featuring some of our bestselling products!

Check back often for new additions and share with your colleagues!



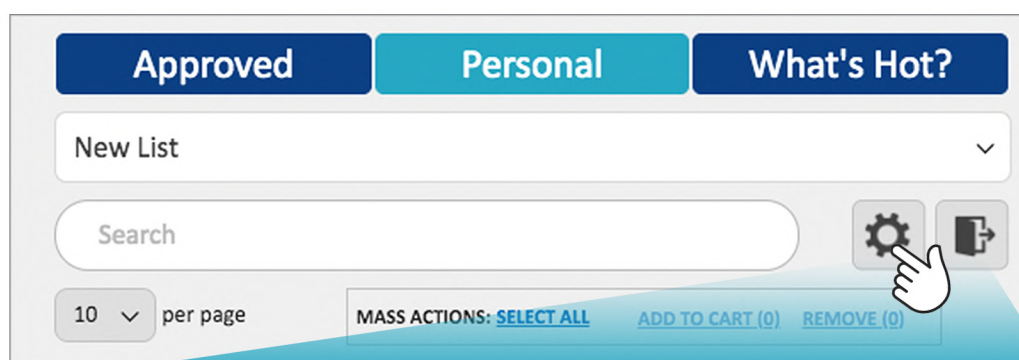


# Performance Health Supply List Update 2020

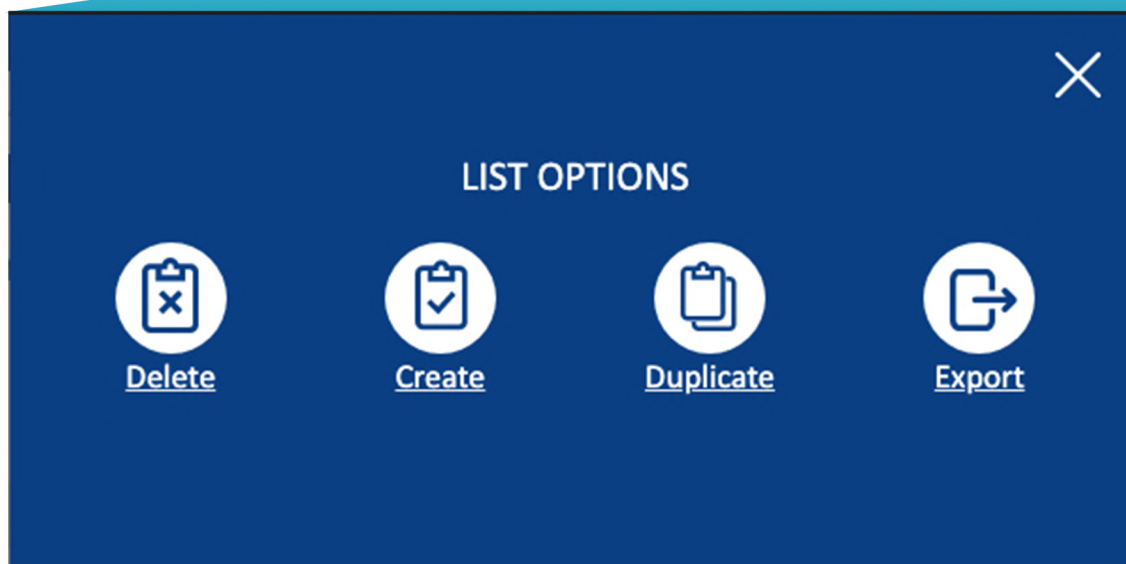
## SUPPLY LIST | CREATING AND MANAGING

### CREATING AND MANAGING SUPPLY LISTS

 New and improved Supply List Settings Options are located under the icon shaped like a gear. **Delete, Create, Duplicate, and Export (Download) lists from this menu.**



To get started, click the **gear icon** and then select **“Create”**



**For instructions** regarding additional options to **Import, Update, Print, and Share** supply lists [click here](#).

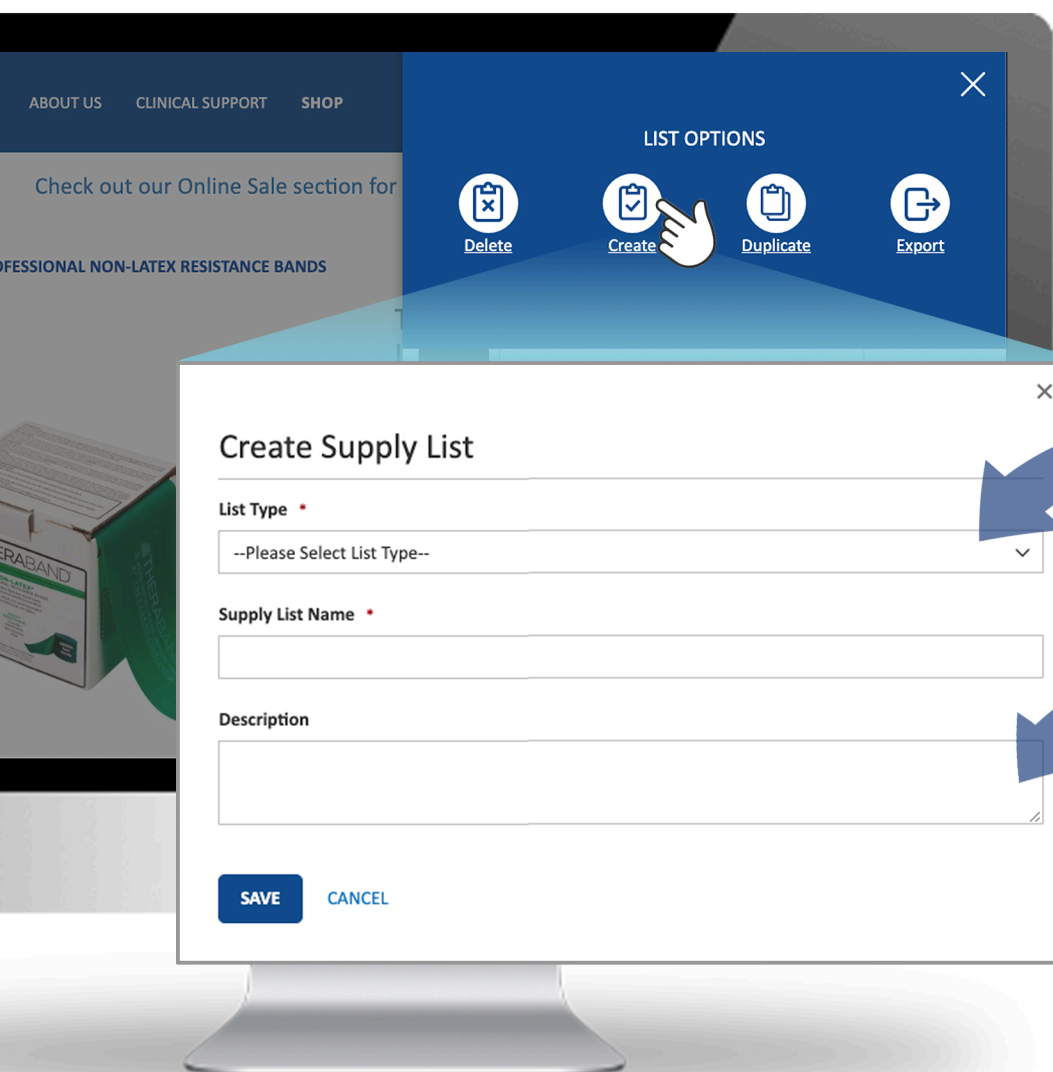




# Performance Health Supply List Update 2020

## SUPPLY LIST | LIST SETTING OPTIONS | CREATING NEW LISTS

## CREATING NEW LISTS | HAS NEVER BEEN EASIER



### Creating New Lists

To create a new list, click the icon shaped like a gear and choose the “**Create**” option.

Then choose your List Type (Company Admin accounts only) and name the new list.

Optionally, give your list a description.

The list name and description is included when you share your list (see page 20).

### Adding Products

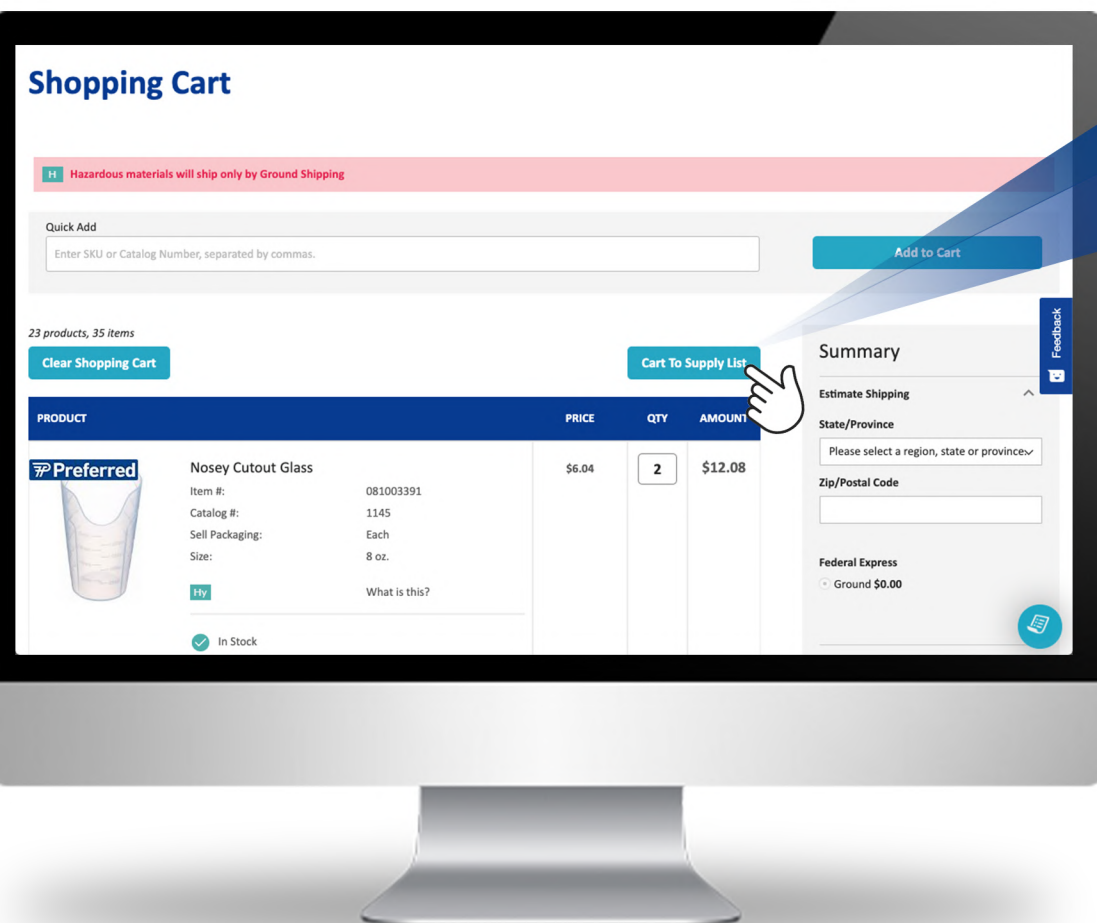
Add products to your supply list directly from a product page, by importing a spreadsheet list, or from your cart.



# Performance Health Supply List Update 2020

## SUPPLY LIST | LIST SETTING OPTIONS | ADDING PRODUCTS

## TURN PRODUCTS IN YOUR CART | INTO A SUPPLY LIST



Cart To Supply List

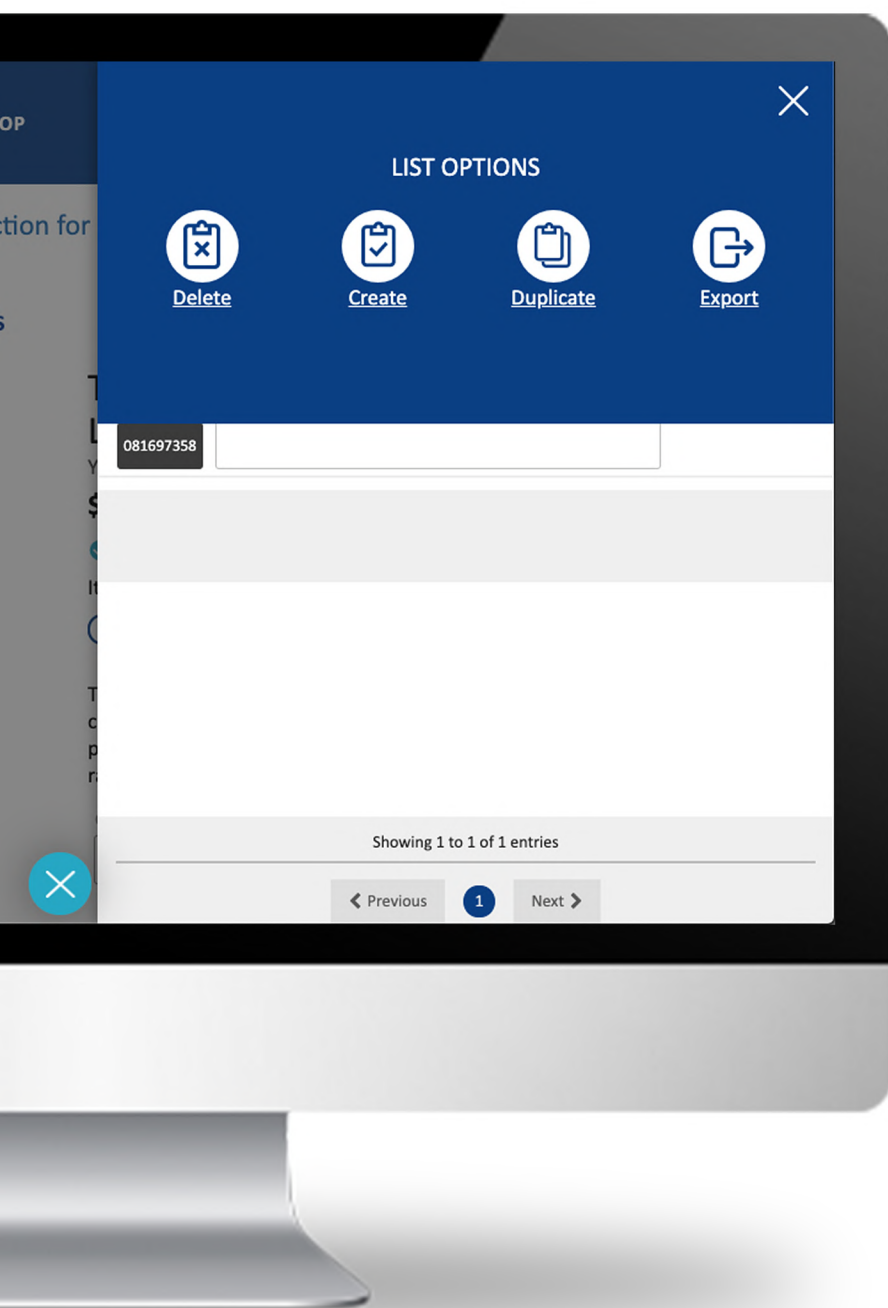
Turn products in your cart into a supply list with the “**Cart to Supply List**” button in the upper right-hand corner of your cart!



# Performance Health Supply List Update 2020

## SUPPLY LIST | LIST SETTING OPTIONS

## SUPPLY LIST | LIST OPTIONS



### Deleting Lists

Select the list you wish to delete from the list menu. Then navigate to the gear icon and select “Delete”. Delete with care - this cannot be undone.



### Creating New Lists

Create new lists, view approved supply lists and also view lists created by us for you.



### Duplicating Lists

New “Duplicate” feature! Great for quickly creating multiple versions of a basic list that can be renamed, customized, and shared with patients, co-workers, or other clinicians.



### Exporting (Downloading) Lists

If you prefer to manage your spreadsheets and supply lists offline, download a .csv (Excel) file of the supply list being viewed with the Export feature.

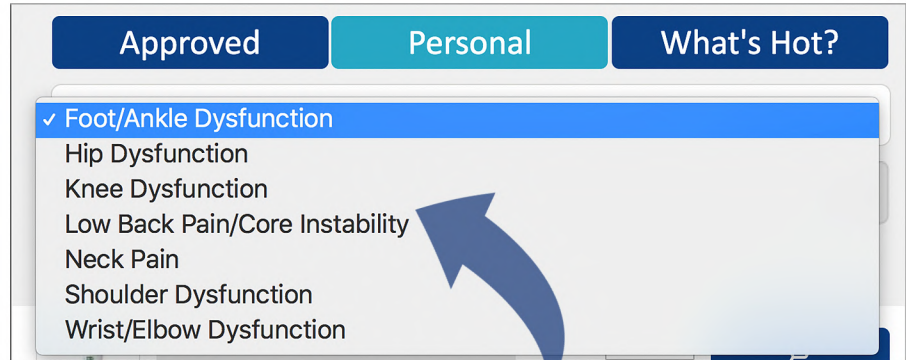




# Performance Health Supply List Update 2020

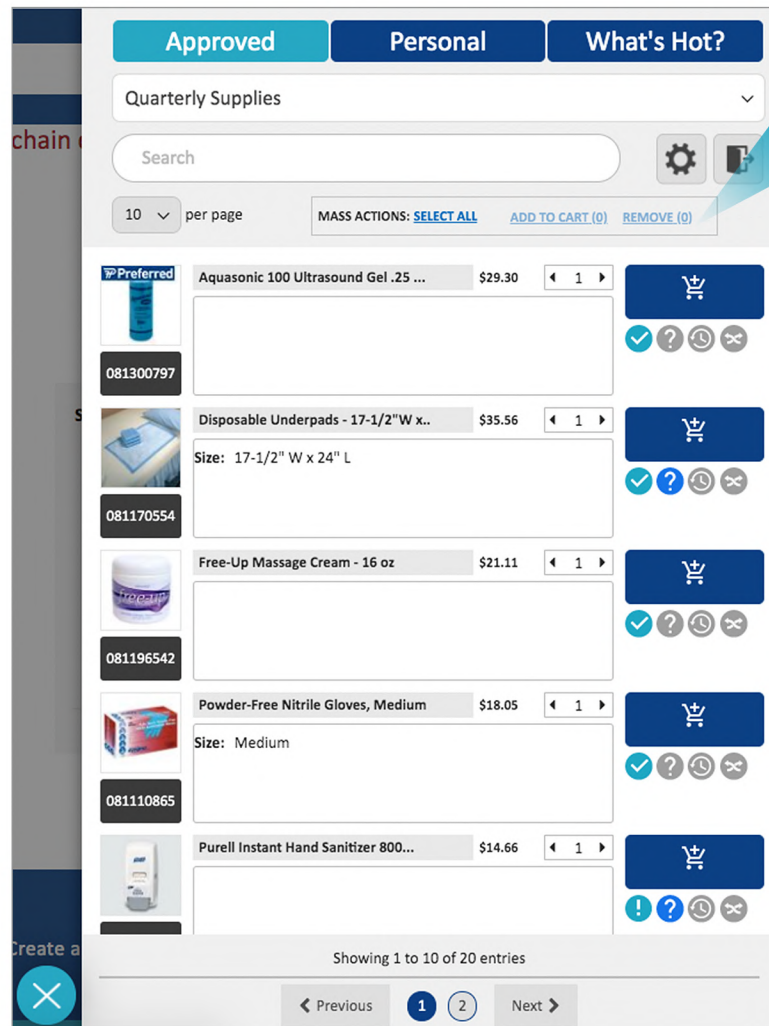
## SUPPLY LIST | USING THE SUPPLY LIST DRAWER

# USING THE THE SUPPLY LIST DRAWER



### LIST MENUS

Switch between lists with the convenient dropdown menu.



MASS ACTIONS: [SELECT ALL](#) [ADD TO CART \(3\)](#) [REMOVE \(3\)](#)

### Selecting Multiple Items

Clicking an item selects it and highlights its line in grey.

- Add selected items to cart or remove from list
- The “[Select All](#)” button selects all items visible on the page

### Selecting All Items on a Supply List

- To select every item on the list first click “[Select All](#)”
- Click “[Next](#)” at the bottom of the list to move to the second page
- “[Select All](#)” for page 2
- Repeat for each page of the list
- Finally click “[Add to Cart](#)” in the “[Mass Actions](#)” section to add all items to cart




# Performance Health Supply List Update 2020



## SUPPLY LIST | SUPPLY LIST DRAWER SYMBOLS

## SUPPLY LIST | DRAWER SYMBOLS







### ACTIONS

	<b>Add to Cart</b>
<a href="#">SELECT ALL</a>	<b>Select all products on a page</b>
<a href="#">ADD TO CART (1)</a>	<b>Adds selected product(s) to cart.</b> The parentheses will update with the number of items selected.
<a href="#">REMOVE (1)</a>	<b>Removes selected product(s) from the current supply list.</b> The parentheses will update with the number of items selected.

### LIST SETTINGS AND MANAGEMENT

	<b>Displays options to Create, Delete, Duplicate, and Export lists</b>
	<b>Displays options to Import, Update, Print, and Share lists</b>

### PRODUCT INFORMATION

	<b>In Stock</b>		<b>Product Information</b>
	<b>Backorder</b>		<b>Order History</b>
	<b>Discontinued</b>		<b>Item Substitution Available</b>

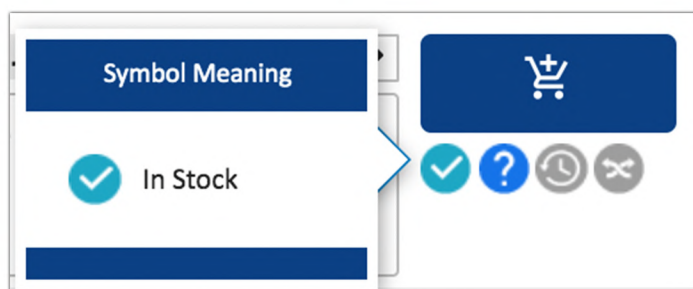


# Performance Health Supply List Update 2020

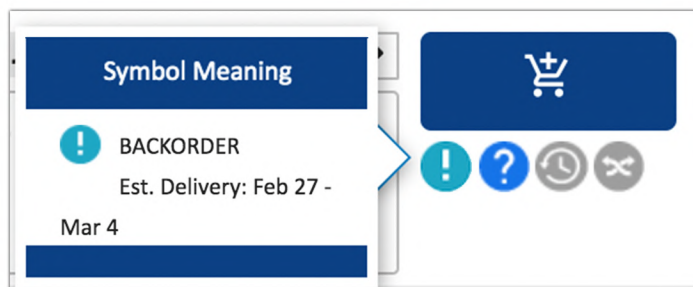
## SUPPLY LIST | STOCK STATUS SYMBOL ICONS

### STOCK STATUS SYMBOLS

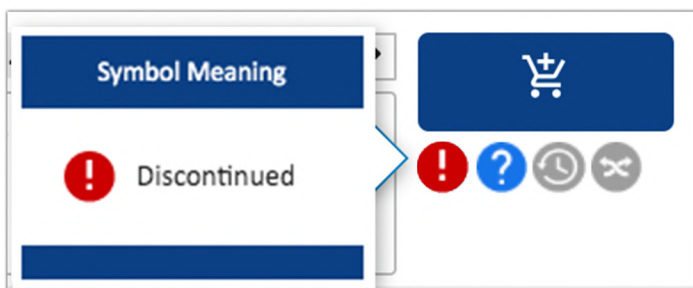
- ✓ In Stock items display a teal checkmark.



- ! Backordered items feature a teal exclamation point and an estimated delivery date (*if available*).



- ! Discontinued items display a red exclamation point.



### Click on any symbol

to view the icon definition and/or additional information like "estimated delivery date".




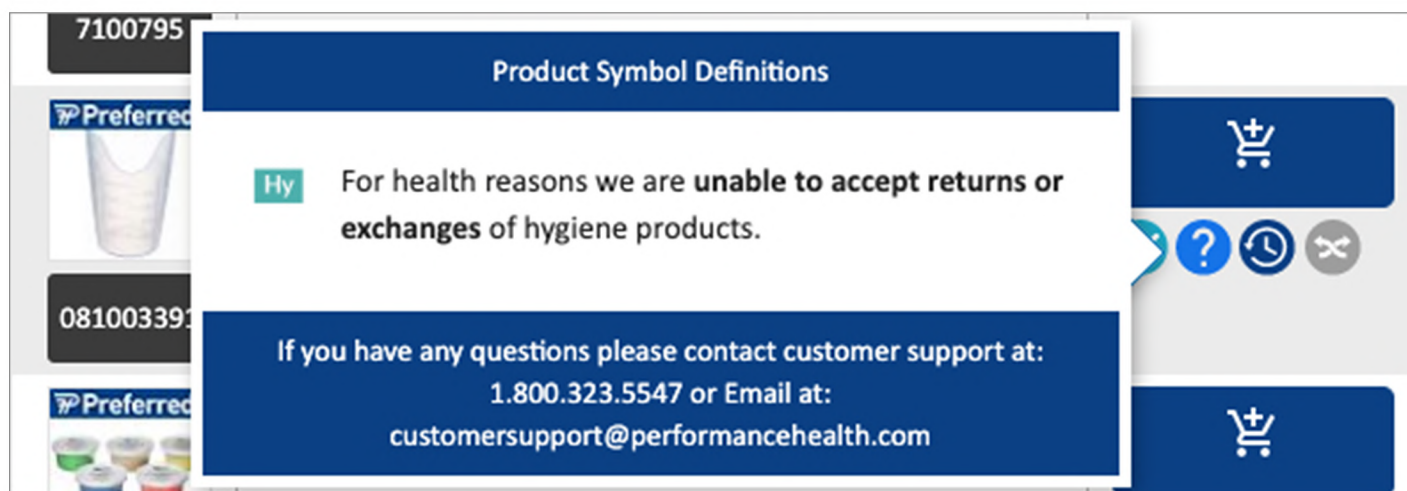







# Performance Health Supply List Update 2020

## SUPPLY LIST | PRODUCT SYMBOL ICONS

### PRODUCT SYMBOLS

-  When highlighted blue, clicking the question mark icon will display important product or shipping information you need to know.




PRODUCT SYMBOL DEFINITIONS	
	This product contains <b>natural rubber latex</b> which may cause allergic reactions.
	For health reasons we are <b>unable to accept returns or exchanges</b> of hygiene products.
	This item is considered dimensionally <b>oversized parcel or requires truck delivery</b> . Additional shipping charges will be calculated at time of order.
	This item is classified as <b>hazardous materials</b> . Can ship ground only - restricted from air. Additional shipping surcharge will be added at time of order.
	This product has a <b>Bariatric rating</b> .



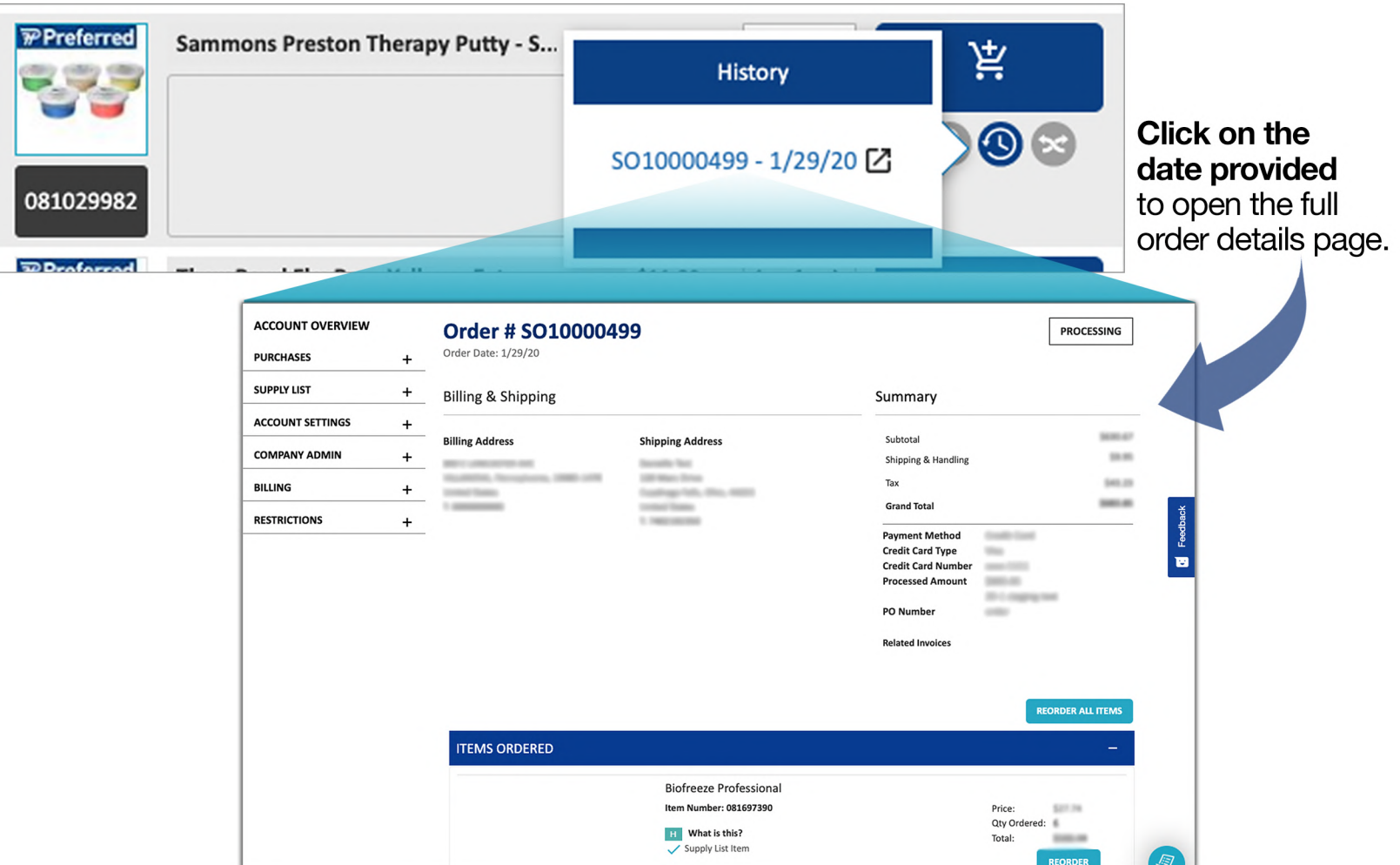
# Performance Health Supply List Update 2020

## SUPPLY LIST | ORDER HISTORY ICON


### ORDER HISTORY

 When highlighted dark blue, clicking the clock icon will display the date of the last time you ordered the selected item and a link to the full order details.

**(Note:** This displays order information for the account you are logged into. If you are logged into a company admin account, it will display the order history matching your individual Ship-To information.)



**History**

SO10000499 - 1/29/20 

**Click on the date provided to open the full order details page.**

**Order # SO10000499** PROCESSING

Order Date: 1/29/20

**Billing & Shipping**

**Billing Address**

10000 KENNEDY RD  
MISSISSAUGA, ONTARIO L5N 5M4  
CANADA  
Tel: (905) 874-1000

**Shipping Address**

10000 KENNEDY RD  
MISSISSAUGA, ONTARIO L5N 5M4  
CANADA  
Tel: (905) 874-1000

**Summary**

Subtotal	\$698.07
Shipping & Handling	\$0.00
Tax	\$45.23
<b>Grand Total</b>	<b>\$743.30</b>

**Payment Method**

Credit Card Type: Visa  
Credit Card Number: 0000 0000 0000 0000  
Processed Amount: \$743.30

**PO Number**



1000000000

**Related Invoices**

[REORDER ALL ITEMS](#)

**ITEMS ORDERED**

Biofreeze Professional Item Number: 081697390	Price: \$17.00 Qty Ordered: 4 Total: \$68.00
--	--

 What is this?  
 Supply List Item

[REORDER](#)

[Feedback](#)



# Performance Health Supply List Update 2020

## SUPPLY LIST | SHARING AND UPDATING

### SHARING AND UPDATING SUPPLY LISTS



New and improved Supply List Sharing and Management Options are located under the **folder icon**.

Approved

Personal



What's Hot?

New List

Search

10 per page

MASS ACTIONS: [SELECT ALL](#) [ADD TO CART \(0\)](#) [REMOVE \(0\)](#)





#### LIST OPTIONS



[Import](#)



[Update](#)



[Print](#)



[Share](#)

Quickly Import,  
Update, Print, and  
Share your lists here.

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Tan Leukotape K 3" X 5.4 Yards

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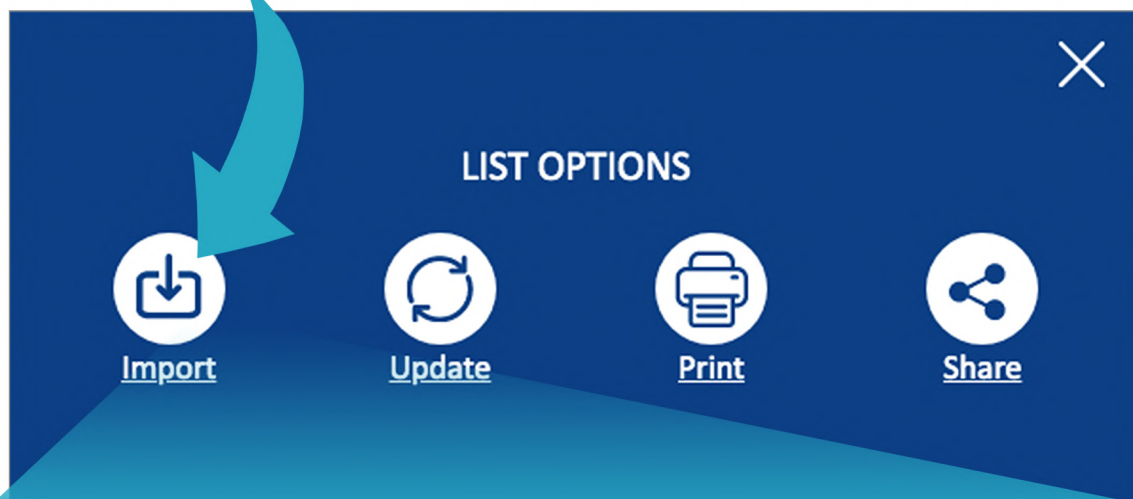


# Performance Health Supply List Update 2020

## SUPPLY LIST | IMPORT

### IMPORT

New “**Import**” feature allows you to create a new supply list by uploading your own .csv (Excel) file of item and quantity information. To Import, open the folder icon and click the Import button. Then follow the provided instructions on the Import page.



*Having trouble?*

**Hint:**  
Click the provided link for more detailed help.

### Import Supply List

IMPORT

UPDATE

List Name \*

List Description

List Type \*

Personal Supply List

Upload File \*

Choose File No file chosen

▲ Please ensure your files only have 100 rows of data. Files larger than 100 rows will need to be split into multiple files and uploaded separately.

IMPORT

#### Instructions

##### General Hints

- Save the file in CSV format (Comma Separated Values, aka “comma delimited”)
- You only need two columns – Item Number and Quantity

##### Use our template as a guide

- Download the template and save it as a different name
  - Remember to save the file in CSV format
  - Copy and paste your selected products into the sheet

[DOWNLOAD TEMPLATE FILE](#)

*Still having trouble? Click to view advanced instructions.*



# Performance Health Supply List Update 2020

## SUPPLY LIST | BASICS

### UPDATE

The “**Update**” feature allows you to upload a .csv file to make mass changes to an existing supply list. The information in your uploaded file will **override** the item number and quantity information in your existing supply list.

**LIST OPTIONS**

**Import** **Update** **Print** **Share**

**Import Supply List**

**IMPORT** **UPDATE**

List Name \*

List Description

List Type \*

Personal Supply List

Upload File \*

Choose File | No file chosen

Please ensure your files only have 100 rows of data. Files larger than 100 rows will need to be split into multiple files and uploaded separately.

**IMPORT**

**Instructions**

**General Hints**

- Save the file in CSV format (Comma Separated Values, aka "comma delimited")
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- Download the template and save it as a different name
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  - Copy and paste your selected products into the sheet

[DOWNLOAD TEMPLATE FILE](#)

*Still having trouble? [Click to view advanced instructions.](#)*

**To Update a list**, choose that list from the list menu, then open the folder icon and click the **Update button**.

**To format your document for upload**, follow the provided instructions.

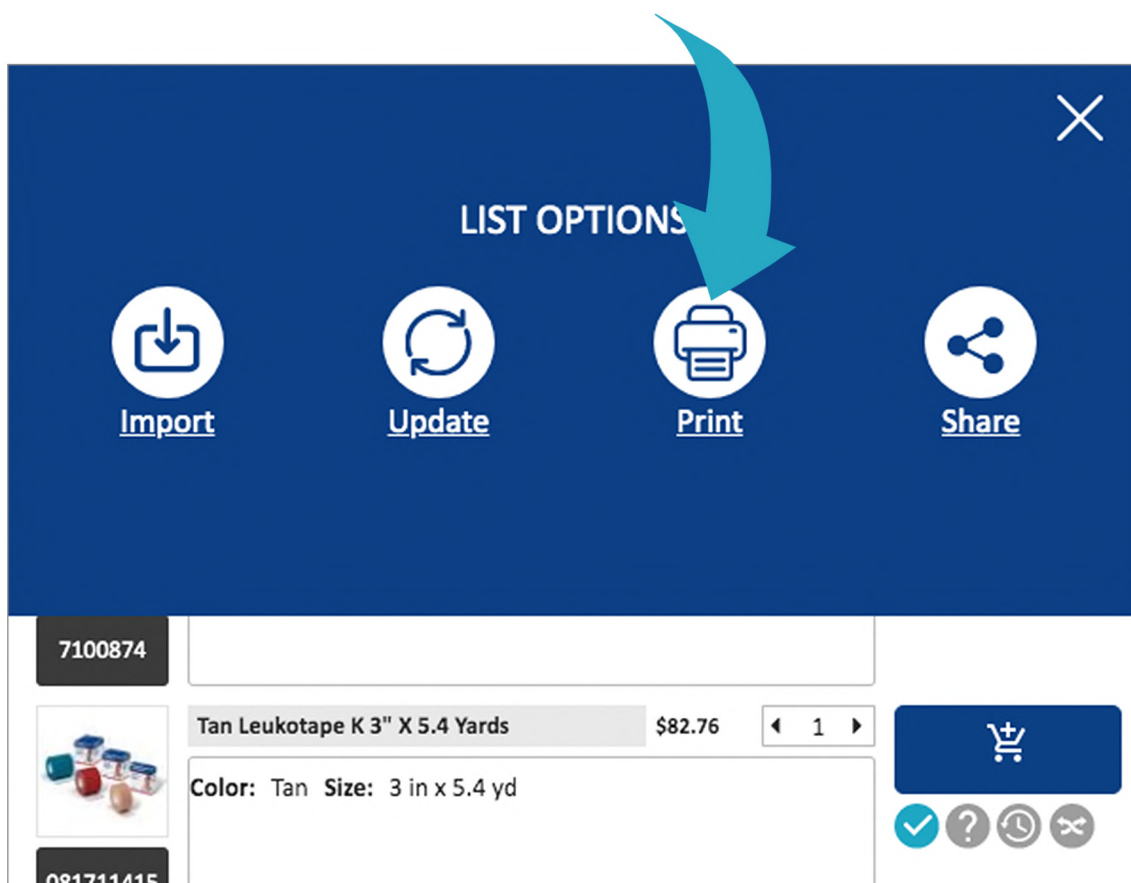


# Performance Health Supply List Update 2020

## SUPPLY LIST | PRINTING SUPPLY LISTS

### PRINT

Quickly print lists for your records. To print a list, choose that list from the list menu, then open the folder icon and click the “**Print**” button.







# Performance Health Supply List Update 2020

## SUPPLY LIST | SHARING SUPPLY LISTS

### SHARE

New “**Share**” feature allows you to easily share a list with clients or co-workers to populate their cart with your recommended or approved items. **To Share a list, choose that list from the list menu, then open the folder icon and click the Share button to display sharing options.**

#### Company Account Share Options

Company Account users can choose to share internally via email with a member of their company, or externally to the email of their choice.

**Copy the link** and easily paste wherever you want to share with others, so they can skip browsing and head right to checkout.

#### Share via Email

Enter a valid email address here to send an email with a link to the items from your selected supply list.

The email includes the list name and description.

**LIST OPTIONS**

Import Update Print **Share**

Email External Email In Company

<https://us-staging.performancehealthdev.com/checkout/cart/index/su> Copy Link

Email Address \*

john.doe@email.com Send



# Performance Health Supply List Update 2020

## SUPPLY LIST | TRY THE NEW SUPPLY LIST DRAWER

## TRY THE NEW SUPPLY LIST DRAWER NOW!

### 1 Login

A screenshot of the 'My Account' login form. It includes fields for 'email' and 'password', a 'LOGIN' button, and links for 'Forgot Password?' and 'Create an Account'.

Login to your  
Performance Health Account.

**LOGIN!**

### 2 Supply List Drawer Icon



Click the **Supply List Drawer Icon**  
to view your existing supply lists or create new lists.

### 3 What's Hot?

#### What's Hot?

Check out the **What's Hot?** Lists for Performance Health's newest additions and carefully curated lists featuring some of our bestselling products!