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.
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.com
Customer Service: 800.323.5547 | customersupport@performancehealth.com
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.
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.
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.
SUPPLY LIST | LIST TYPES

**Approved 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.

**Personal List**

Lists that you create will appear under Personal Lists.

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

**What’s Hot? List**

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!
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](#).
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.
TURN PRODUCTS IN YOUR CART | INTO A 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!
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 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
# SUPPLY LIST | DRAWER SYMBOLS

## ACTIONS

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Cart</td>
<td>Add to cart</td>
</tr>
<tr>
<td>Select All</td>
<td>Select all products on a page</td>
</tr>
<tr>
<td>Add to Cart (1)</td>
<td>Adds selected product(s) to cart. The parentheses will update with the number of items selected.</td>
</tr>
<tr>
<td>Remove (1)</td>
<td>Removes selected product(s) from the current supply list. The parentheses will update with the number of items selected.</td>
</tr>
</tbody>
</table>

## LIST SETTINGS AND MANAGEMENT

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Settings</td>
<td>Displays options to Create, Delete, Duplicate, and Export lists</td>
</tr>
<tr>
<td>Import/Update/Print/Share</td>
<td>Displays options to Import, Update, Print, and Share lists</td>
</tr>
</tbody>
</table>

## PRODUCT INFORMATION

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Stock</td>
<td>Product Information</td>
</tr>
<tr>
<td>Backorder</td>
<td>Order History</td>
</tr>
<tr>
<td>Discontinued</td>
<td>Item Substitution Available</td>
</tr>
</tbody>
</table>
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".
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 natural rubber latex which may cause allergic reactions.

- For health reasons we are unable to accept returns or exchanges of hygiene products.

- This item is considered dimensionally oversized parcel or requires truck delivery. Additional shipping charges will be calculated at time of order.

- This item is classified as hazardous materials. Can ship ground only - restricted from air. Additional shipping surcharge will be added at time of order.

- This product has a Bariatric rating.
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.)
SHARING AND UPDATING SUPPLY LISTS

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

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

Import Supply List

List Name *

List Description

List Type *
Personal Supply List

Upload File *
Choose File No file chosen

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

If having trouble? Click to show advanced instructions.

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

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.
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.
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.
TRY THE NEW SUPPLY LIST DRAWER NOW!

1. Login
   - Login to your Performance Health Account.
   - Click the Supply List Drawer Icon to view your existing supply lists or create new lists.

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