



## **Create an ACC MRES Equipment Application – Assessor Tutorial Video Script**

**This tutorial will help you to create an ACC MRES Equipment Application for Simple, Standard, Complex, Non-List and Write-in Products.**

To create an ACC Application, go to the menu and click

**Applications**

then

**Applications.**

This will take you to a page containing all the Applications you have created and from here you can select any of your applications to view or edit.

To create a new application, click the **Create** button.

Begin by using the magnifying glass next to the 'Customer' field to select the customer for this application.

If the customer you are looking for is not in your list, you can search for the customer using the **Find Customer** page.

Find customer using options provided.

Click on the **drop-down arrow** on the far right and select **Edit**.

Check customer details then navigate to the **Application** section and click **Create Application**.

Now fill in the summary for the application. The summary is a brief description of that this application is for, for example, 'Wheelchair' and 'Seating Request'.

Use the magnifying glass next to 'Claim' to lookup a claim for this application.

Use the magnifying glass next to 'Contract' to select the contact for this application.

Select **ACC MRES** for an equipment application.

Use the drop-down button by 'Application Type' to select **Equipment**.

Then use the magnifying glass next to 'Sub-type' to select **Purchase**.

Now click **Create Application**.

This will take you to the **Edit Application** page where you can review the application details.

Move to the **Address Information** section and use the magnifying glass next to the 'Customer Address' field to select the **address** this application will apply to, as well as the **delivery contact details**. Any **delivery instructions** required can be filled in under **Special Delivery Instructions**.



Head to the bottom of the page and click **Save Application** to save your work up to this point.

Now move to the **Items** section and click **Add Catalogue Item**.

This will take you to the **Product Catalogue** where you can view all available items.

You can use the filters on the left to limit the number of items on the page.

Use the **Catalogue Type** to filter by ACC or Non-List; or use the **Catalogue Level** to filter by **Simple, Standard, or Complex**, then click **Search**.

Once you find the item you are looking for, click the **Items** menu and click **Add**.

Fill in the required information, including the quantity. If you require more than one, then click **Add**.

If you decide not to add this item, click the **X** at the top right corner.

Once all your items are added, click **Continue Application**.

If the application is for **Non-Catalogue items**, under the **Items** tab, you can click **Add Non-catalogue item**.

Work your way through the page, filling in the required information. Use the magnifying glass next to the 'product classification'.

Select the appropriate category for your item.

Then enter a price and a rationale for using a write-in item.

Then click **Add Item**.

Quotations for 'Write-in Products' and 'Assessment Reports' for Complex or Non-List equipment applications, are to be attached via the **Supporting Document** section

Scroll to the **Supporting Document** section and click **Attach Documents** then click the magnifying glass next to **Document Type** and select the **Application Option**.

For example, to attach the assessment report, select **Attach File** to open your documents.

Select your document to upload, name your document as required, then click **Submit**.

**Save and Close.**

If you need to attach more than one document to your application, simply the repeat the process by selecting **Supporting Documents**, attach the document, then click the magnifying glass next to 'Document Type', and select the applicable option.

For example, attaching a non-catalogue quotation.



You can now follow the steps on the screen to attach the required documents.

Once you select **Save** and **Close**, select **Supporting Documents**, where you will see the documents you have uploaded to your application.

Now move to the bottom of the page and click **Save Application**.

Once saved, you can now click **Submit Application**.

Read the privacy statement and click **Submit**.