



## **Create an ACC MRES Equipment Trial Application Tutorial Video Script**

**This information will help an ACC Assessor to create an MRES Equipment Trial Application.**

To create an ACC Trial 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.

Select **Edit** from the **Customer Menu**, navigate to the **Application** section and click **Create Application.**

Now, fill in the summary for the application.

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

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

Use the drop-down to select **Equipment.**

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

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.**

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

Now navigate to the **Items** section.

If the item required is a catalogue item, click **Add Catalogue Item.**

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

Use the filter on the left to reduce the number of items on the page.

To see only **Trial Equipment**, click the checkbox labelled **Trial**, then click **Search.**



Once you have found the item you are looking for, click the **Items** menu and select **Add**.

Fill in the required information, being sure to enter the information under the **Trial Details** section.

Enter an **Expected Trial Start Date** for this trial and an expected **Trial End Date**. Then click **Add**.

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

You will now be able to see the items added in the **Catalogue Item** section.

If the item required is a **Write-In Item**, click Add **Non-Catalogue item**.

Work your way through the page filling in the required information then click **Add Item**.

For all non-catalogue items, an itemised quotation for the product it required.

You can upload your itemised quotation by selecting **Supporting Documents, Attach Document**.

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**.

Once the application is submitted, the Team at Accessable will review your application.

Once the application status has changed to **Fulfilled**, you have five working days to set an actual start date for the trial.

You can do this by opening the application by using the menu and selecting **Edit**.

Navigate to the **Items** section, open the **Item Menu** and click **Edit**.

Now enter an **Actual Trial Equipment Delivery Date**.

Scroll to the bottom of the page and click **Save**.

Scroll to the bottom of the page and click **Process**.

If you do not set an Actual Trial Equipment Delivery Date within five working days, the system will automatically use the estimated deliver date.