PECOS Purchase 2 Pay (P2P) System

Quick guide: Ordering from a template

Partners Procurement Service

Introduction

This quick guide provides a one page reference to users of the PECOS system on how to raise an order from a pre-saved template. Templates allow users to save a list of regularly ordered items and reorder them quickly. The guide is intended to be a high level quick reference rather than an exhaustive explanation of how the system works. More detailed information can be found in the online help or by downloading the PPS user guide at http://nhspps.uk

Steps

Templates will allow you to raise a requisition in as little as 3 clicks (or 10 seconds):

1. Select **Templates** from main menu

 | 🏠 | Items | Documents | To Do | Cart | Templates | Blanket Orders |
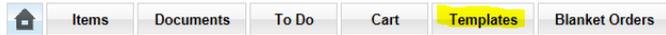
2. Find template you wish to order and click **Add to current cart** button

3. Review the cart and **Submit** for approval   Submit

Sometimes however, you will want to customise your shopping cart. When you click the **Add to current cart** button, the items in your template are added to your shopping cart. At this point, you can edit the cart. Maybe you want to delete a line you don't want this time, or you want to change the quantity before you submit it. You choose.

Now the items are in your cart, you can also add other items, either by searching the catalogue, adding non-catalogue requests, or even adding items from other saved templates.

The rest of the process is the same as submitting any other shopping cart as a requisition. As such, you will need to perform the usual checks like financial codes, supplementary forms, carriage etc.

Log in
(pps.pecosipm.com)

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Click 1: Select Templates

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Click 2: Add to current cart

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Click 3: Submit
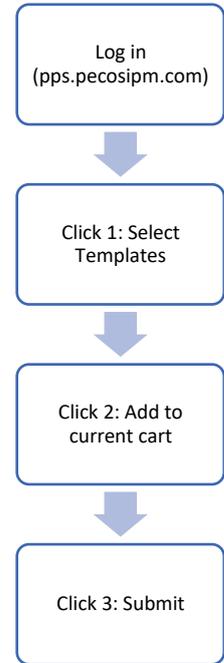
Saving a template

If you would like to create your own template, this can be easily done. Build your shopping cart in the usual way by searching the catalogue and adding items. Before submitting your cart asa requisition, click the **Save Template** button.

Next, give your template a name and type and decide whether you would like to share your template with others or keep it private.

Finally click Save and your template will be available for future use. Any changes we make to the catalogue will automatically be represented in your template.

Getting Help

You can get further help on using the PECOS system from the online help, accessed through the question mark   ❓   icon on the top right of the page.

You can also review guidance documents, or refresh yourself on the eLearning at http://nhspps.uk

If you are still experiencing problems, you can log a call with the PPS help desk either online at http://nhspps.uk or by calling 020 3322 1935.