Integrated Fulfillment Services, VGM Fulfillment User Guide

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1. Introduction

Brightree and VGM have streamlined your ordering workflow by automating the delivery of the patient drop ship order file from Brightree to VGM Fulfillment. The automated process for submitting orders to VGM will run 4 times per day Monday through Saturday and 2 times per day on Sundays, and will be submitted to VGM based on the required fields included in this Guide.

Requirements for VGM Automation

The following requirements are needed for VGM Automation:

- The Item ID or Manufacturing ID fields on your Item Setup must be populated with the manufacturer part number to align with your selected Site Setting.

- The Scheduled Date field must be completed for processing orders. A date in this field will trigger Brightree to submit the orders.

- Sales Order: Selected from a drop down:
  - Fulfillment Vendor
  - Account Number
  - Ship By – Optional

Benefits of VGM Automation

The following are Benefits of VGM Automation:

- Streamlines your ordering workflow by automating the processing of orders to VGM Fulfillment

- Orders submitted to VGM four times daily Monday through Saturday and twice on Sundays:
  - Once at 10 AM ET: Meets VGM Cutoff time for next business day shipment/shipping
  - Once at Noon EST: Meets VGM Cutoff time for next business day shipment/shipping
  - Once at 3 PM EST: Meets VGM Cutoff time for next business day shipment/shipping
  - Once at 3 AM EST: Any orders from the previous day that were not placed with a scheduled date of the previous day prior to 3PM EST.

- On Sundays, Once at Noon EST: Meets VGM Cutoff time for next business day shipment/shipping.

- On Sundays, Once at 3:00 PM EST: Meets VGM Cutoff time for next business day shipment/shipping.

2. VGM Orders

Brightree Integrated Fulfillment Service allows drop ship orders to be placed with VGM based on sales order data. You may be able to use VGM to process and ship CPAP (Continuous Positive Airway Pressure) supply orders directly to patients. Patient orders are sent by Brightree to be picked up by VGM four times Monday through Saturday at 3 am, 10 am, Noon, and 3 pm Eastern Time. On Sundays, the orders are picked up by VGM at Noon and 3:00 PM only. VGM will ship within one business day if received before 3:00 P.M. Eastern Time.

VGM can combine supplies from several vendors on the same patient drop ship order. The VGM order number is the Brightree Sales Order number.

Purchase Requests can be created daily for VGM orders. Purchase Orders are created from the Purchase Requests for the vendor specific items that are invoiced directly by the vendor. This process will facilitate tracking costs.

The information included in the VGM electronic invoice (EDI 810 Report) shows the delivery charge to the HME. The 810 Invoice will list the vendor specific items that were included in the patient delivery.

Setting Up VGM Fulfillment Automation

Before Fulfillment Order data is submitted to VGM for the Automated process, it is recommended the Site Settings be set. To determine whether Item ID or Manufacturer ID field should be selected it is recommended that you review your inventory item detail to determine the best option. You may run the report by going to **Reports** > **Inventory** > **Item Detail**.

Use the below filters and click Request Report. Once the report is available in an Excel format you can easily identify which fields contain the required ID #s. If using manufacturer ID, you may sort the report to identify the item(s) that may need to be updated.

Note: If you have ID's with leading zeros, Excel may remove the leading zeros from the report. You may have to export as pdf.

Once you have determined which field to use, Item Id or Manufacturer ID, the site setting should be set by using the steps below:

1. Go to System **Setup** > **System** > **Site Settings** and open the ePurchasing category:

2. From the section, VGM Automation – VGM Item ID, select the field which will contain the VGM item number:

> **Note**: VGM requires the Manufacturer item number be used in placing orders. The Site Setting gives you the option of using the field in your Item record that contains the required VGM item number.

- None – The default setting. If Item Id or Manufacturer ID is not selected and orders are created to be submitted by Brightree to VGM, the Manufacturer ID field will be submitted to VGM.
- Item ID – Select Item ID if Items in Brightree are set up with the VGM item number in the Item ID field (Inventory > Items)
- Manufacturer ID - Select Manufacturer ID if items in Brightree are set up with the VGM item number in the Manufacturer ID field (Inventory > Items)

3. Click Save.

Setting Up VGM Items for Sales Orders

VGM uses the manufacturer item number for processing drop shipment orders. Brightree Item setup must use either the manufacturer item number as the Item ID or populate the correct and specific manufacturer item number in the Manufacturer ID field. VGM may provide the Provider an Item List spreadsheet as part of the enrollment process. New Item List spreadsheets may be provided as VGM adds additional products to the drop shipping service.

If you have existing items where the Item ID is the Manufacturer item number, it is recommended you use the Site Setting = Item ID.

Item ID: 14994
Item Name: Resmed Standard Tubing
Item Description: Resmed Standard Tubing
Stocking UOM:

> **Note:** Updating the Item ID for an existing inventory item is not recommended as the item has been used in history and could cause issues with inventory tracking and identity. Instead, if changes to an existing item are required, it would be recommended to update the manufacturer ID number

If the Manufacturer item number is not used as the item ID, it is recommended you use the Site Setting = Manufacturer ID and that the actual Manufacturer item number is filled in the Manufacturer ID field at the item inventory level.

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Entering Sales Orders

Sales Orders require specific fields set up to facilitate VGM order processing. The required sales order entry process is:

1. The Manufacturer item number must be added to the Item Setup in either the Item ID or Manufacturer ID field, depending on the Site Setting Selection, or the Brightree default setting.

2. The **Delivery Scheduled Date** must be completed.

Note: The Scheduled Date controls the date the product will be shipped by VGM. VGM does accept future dates. Brightree will pick up an order with a future date and VGM will ship accordingly. If the Scheduled Date contains a date in the past, VGM will modify the date to reflect Today's Date.

Note: If your sales orders are being created via a Sales Order Template, you have the option of populating this field with a date or leaving it blank to be filled in once the order is ready for shipment. When using Sales Order Templates, if all three required fields are populated, Brightree will send the order to VGM on the next order cycle.
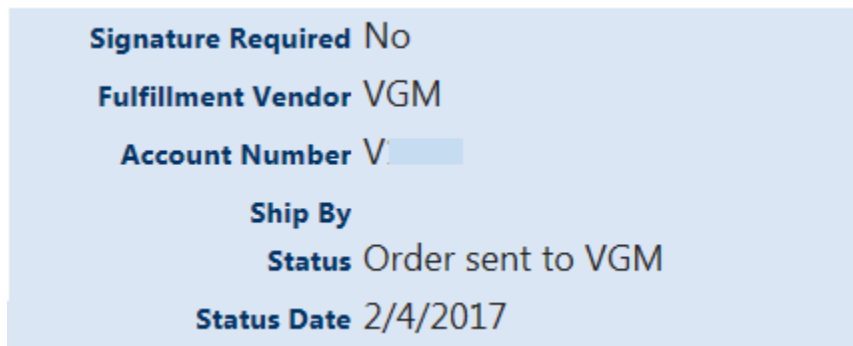
3. In the Delivery section of the Sales Order – Order tab, the following fields must be completed:

- Signature Required - Select to require a signature upon delivery (Optional field)

- Fulfillment Vendor – Select VGM – This is a required field.

- Account Number - Account numbers preconfigured by Brightree - Select the appropriate Account number if multiple VGM Account Numbers are available – This is a required field.

- Ship By – Select optional method of Shipping: Next Day Air / Next Day Saturday / Second Day Air – This is an optional field. The default is Ground or your negotiated Ship By method.

- Status – System will populate the Status once the order has been submitted to VGM. **NOTE**: The Status of Order Sent to VGM does not mean the order has been shipped by VGM.

- Status Date – System will populate once the order has been submitted to VGM

Fields to populate:

☐ Signature Required	
Fulfillment Vendor	[Select] ⌄
Account Number	⌄
Ship By	⌄
Status	
Status Date	

Once the Order has been Submitted to VGM:

Signature Required	No
Fulfillment Vendor	VGM
Account Number	V
Ship By	
Status	Order sent to VGM
Status Date	2/4/2017

Sales Order Templates

When using sales order templates in conjunction with CPAP supplies to be shipped by VGM, you have the ability to set defaults on the sales order template that will be transferred to a sales order created from the template. Doing so will ensure the correct information is present for the sales order automation process. If you are using Connect as your automated resupply program additional functionality is described directly below.

The following fields may be set on the sales order template for auto default to a sales order:

- Selected from a drop down:
    - Fulfillment Vendor
    - Account Number
    - Ship By – Optional

NOTE: If all three fields are populated when using the sales order template, Brightree will submit the sales order to VGM on the next order cycle.

Connect Sales Order Templates

Clients who use Brightree Connect and Fulfillment Services can take advantage of the fulfillment vendor settings defaults on their Connect Survey Settings. Once setup, fulfillment vendor required information will default to the Sales Order Templates and the Sales Order which eliminates the need to enter this information for each Sales Order Template or Sales Order.

Setup

Follow the steps below to setup the Fulfillment Vendor information in a Brightree Connect Survey.

1. Go to System **System Setup** > **System** > **Branch Offices** > access the Branch Office you wish to edit.

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2. Click the Connect Tab and go to Survey Settings.

3. Click the appropriate **Survey Type**.

4. Select the Fulfillment Vendor, Account Number, and Ship By.

Note: If users select the Fulfillment Vendor and Account number, and have a date in the Delivery Scheduled Date field, the order may be submitted to VGM if the provider is activated for the automated workflow.

5. Click the **Save** button.

6. Click the **Copy to All Branches button** when the Fulfillment Vendor Settings should be copied to all branched for that Survey Type.

These settings will default in the Sales Order Template and the Sales Order for clients using Connect and Fulfillment.
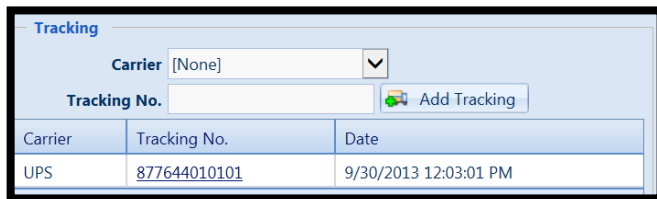
Note: If you would prefer to review your orders before they are submitted to VGM using the automated workflow, you must leave one of the required fields empty. Required Fields are Delivery Scheduled Date, Fulfillment Vendor, Account Number.

Reviewing Patient Sales Order Shipment Tracking Information

The patient Sales Order is updated with the shipping tracking information.

1. Access the patient Sales Order by selecting either **Patient** or **Sales Order** from the **Ordering** main menu.

2. Select a specific Sales Order for item delivery. The tracking information can be located at the bottom left side of the **Sales Order** page **Order** tab.

Tracking		
Carrier [None]		
Tracking No.		Add Tracking
Carrier	Tracking No.	Date
UPS	877644010101	9/30/2013 12:03:01 PM

3. Clicking the **Tracking No**. link to access the Carrier's Web page.

Tracking information is also located on the VGM 810 invoice report.

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3. Using ePurchasing Reports

Report Type 810-Invoice and Vendor Summary are utilized for eVendor Carrier VGM.

To access the Vendor Summary and 810 reports follow the steps below:

1. Go to **Inventory** > **ePurchasing Reports** to display the ePurchasing Reports page:

2. The eVendor VGM can be selected from the Drop-Down menu and the following reports may be selected from the Report Type drop down menu:

   - 810 – Invoice – view order and shipping detail.
   - Vendor Summary – Hyperlinks are available for easy access to tracking packages and confirming orders.

3. Click Search or populate other fields from the drop-down lists and click Search to display All or Specific reports in your system. The sample directly below is from Report Type 810-Invoice and click Search with no additional fields populated:

4. Click the Pencil icon to display the report.

Using 810-Invoice and Vendor Summary Reports

This section details how both the 810 Invoice and Vendor Summary reports work with Integrated Fulfillment Service, VGM Fulfillment.

810 Invoice Report

The 810 Invoice is sent in response to the Brightree automated sales order report file once the goods have shipped from VGM Fulfillment.

VGM will generate an 810 that commonly contains the following:

- General Vendor Information:
    - ePurchasing Vendor
    - Transaction Set ID Code
    - Control Number
    - Total # of Lines
- Shipping:
    - Ship To/Bill To
        - Name
        - Street
        - City, State, Zip
        - Date Shipped
- Items
    - Item #/Description
    - Qty
    - UOM
    - Price
    - Vendor Product ID
    - BT Item ID
    - USPS (Tracking Information Link)
    - Total Invoice Amount
- Other Charges
    - Charge Type
    - Freight Charges

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ePurchasing Report - 810 Invoice

🖨 Print

Formatted (1) | Raw (2)

General

ePurchasing Vendor	VGM
Transaction Set ID Code	Invoice
Control Number	113637
Total # of Lines	25

Shipping

Ship To

Name	[REDACTED]
Street	
City, State Zip	OAKLAND, CA 94618
Date Shipped	10/16/2013

Bill To

Name	[REDACTED]
Street	
City, State Zip	MODESTO, CA 953552473
Date Shipped	10/16/2013

Items

Item #	Qty	UOM	Price	Vendor Product ID	BT Item ID
Description					
0001	1	EA	0	36800	
H5I CLEANABLE HUMIDIFIER					
0002	1	EA	0	36810	
S9 SLIM LINE TUBING					
0003	3	EA	0	36851	
S9 STANDARD CPAP FILTER					

USPS 9405515901206880376737

Total Invoice Amount $12.00

Other Charges

Charge Type	Amount
Freight Charge	$12.00

Vendor Summary Report

The **Vendor Summary** report facilitates reconciliation of the 810 Invoice against weekly or monthly invoices.

The **Vendor Summary** report contains the following 810 Invoice data:

- Sales Order (link)*
- Vendor Item Number
- Unit Amount
- Quantity Shipped
- Total Amount
- Ship To Name
- Ship Date
- Tracking Number
- Cost

* The Sales Order link is available only if the 810 Invoice returned from the vendor can be matched with an associated Sales Order in Brightree. For example, you will not find a match if the purchase request is entered directly in the vendor's online ordering system.

Sales Order and Sales Order Template Ad-hoc Reports

The Sales Order and Sales Order Template Ad-hoc reports have been updated to allow for tracking on the following new fields:

Sales Order

- Fulfillment Vendor
- Account Number
- Ship By
- Status
- Status Date

Sales Order Template
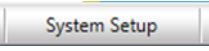
- Fulfillment Vendor
- Account Number
- Ship By

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4. Site Settings

Use the steps below to set up the site settings:

1. Navigate to the [System Setup] drop-down menu.

2. Select Site Settings.
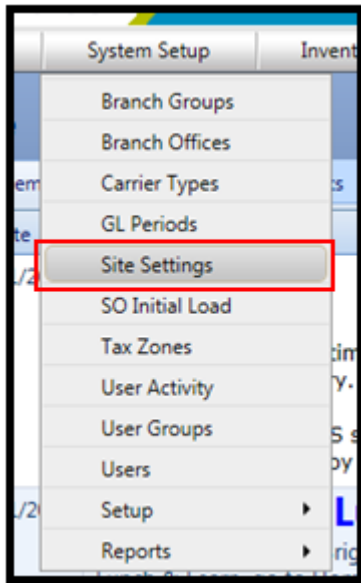
3. Navigate to the General section and expand by selecting the [+] icon.
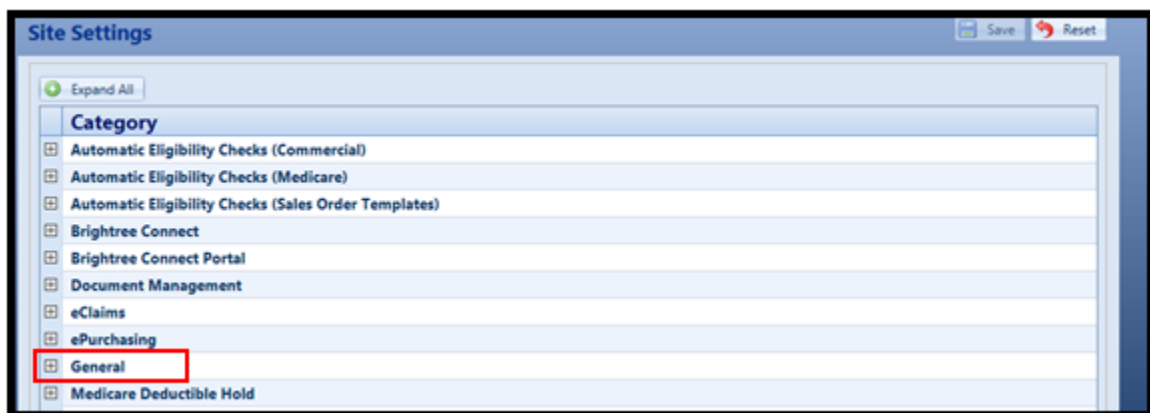
4. Once expanded, scroll down to the line titled Tracking Numbers – Set SO status and delivery date.

5. If selected, by checking the box , the system will update the sales order status to Delivered and populate the sales order actual delivery date with the date the tracking number is populated into the Brightree system.

6. Scroll up to the ePurchasing Site Settings category:

7. Select the field the field which contains the VGM item number:

- Item ID
- Manufacturing ID

8. Click Save.

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5. History Tracking Sales Orders

How to Track Sales Orders

Sales orders can be tracked to verify that they have been submitted to VGM by going to the Sales Order – History tab. Use the steps below to perform this task:

1. Go to Ordering > Sales Orders and search for and open the sales order record.

2. Click the History tab.

| Date Changed	Changed by	Changed	Update Source
02/07/2017 07:23:49 AM	System, System	New Tracking Number 9400110899647027839094 for Carrier Other	ePurchase Response Document Processor
02/07/2017 07:23:49 AM	System, System	[A7035] DOS changed from '[None]' to '2/7/2017'.	Unspecified Source
02/07/2017 07:23:48 AM	System, System	[MASK AMARA VIEW L] DOS changed from '[None]' to '2/7/2017'.	Unspecified Source
02/07/2017 07:23:48 AM	System, System	[CUSH AMARA VIEW L] DOS changed from '[None]' to '2/7/2017'.	Unspecified Source
02/07/2017 07:23:48 AM	System, System	[M Series/PR Syst One] DOS changed from '[None]' to '2/7/2017'.	Unspecified Source
02/07/2017 07:23:47 AM	System, System	[Reusable Performance] DOS changed from '[None]' to '2/7/2017'.	Unspecified Source
02/07/2017 07:23:47 AM	System, System	Status changed from 'New' to 'Delivered'.	ePurchase Response Document Processor
02/07/2017 07:23:47 AM	System, System	Actual Delivery Date changed from '[None]' to '2/7/2017'.	ePurchase Response Document Processor
02/07/2017 07:23:47 AM	System, System	BrightSHIP Status changed from '[None]' to 'Shipped'.	ePurchase Response Document Processor
02/04/2017 03:00:34 AM	Conversion, Conversion	Order sent to VGM.	Unspecified Source

Once the order has been submitted to VGM, it will appear in the History grid section with other information.

Note: The History data indicates the order has been sent to VGM, this is not confirmation that the order has been accepted or shipped by VGM.

Audit Trail Ad-Hoc Report

Sales orders can also be tracked for a period of 12 months using the Audit Trail Ad-Hoc report by following the steps below:

1. Go to Home > My Ad-Hoc reports > click the Design a Report link

2. Scroll down and select the Audit Trail Ad-Hoc report and generate the report as you normally would.

Sales Order Ad-Hoc Report

You may also get a full view of the Sales orders that were submitted to VGM by using the Sales Orders Ad-Hoc Report.

1. Go to Home > My Ad-Hoc reports and click the Design a Report link.

2. Scroll down and select the Sales Order Ad-Hoc report.

3. In the Sales Order Section click Number.

4. In the Delivery Section click Fulfillment Vendor, Account Number, Ship By, Status, Status Date.

5. Click Next.

6. On the Functions & Calculations page click Next.

7. On the Visual Grouping and Sorting page click Next.

8. Add the following Filters:

   a. Filter Field = Delivery_Fulfillment Vendor
   b. Operator = Equals (Drop Down)
   c. Value(s) = VGM

9. Click the Refresh button and allow the data to load.

Sales Order Number	Delivery Fulfillment Vendor	Delivery Account Number	Delivery Ship By	Delivery Status	Delivery Status Date ▼
25274	VGM	V36578			
27245	VGM	V36578			
27243	VGM	V36578			
27246	VGM	V36578			
27240	VGM	V36578			
27172	VGM	V36578			
27176	VGM	V36578			
27230	VGM	V36578			
27356	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM
27319	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM
27412	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM
27314	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM
27322	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM
27142	VGM	V36578		Order sent to VGM	2/8/2017 3:00:14 AM

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Confirming VGM Shipment of Orders

VGM will send out the 810 Invoice once the order has been shipped. When the 810 Invoice report comes back from VGM, users will know that VGM has received and shipped the order

Users should access the Vendor Summary Report to review VGM shipped orders that need to be confirmed. The Vendor Summary includes a hyperlink to the Sales Order to complete the Confirmation process. To view the Vendor Summary Report, go to: Inventory > ePurchasing Reports > Vendor Summary > VGM > Search.

Exception Reporting – Sales Order Rejected by VGM Fulfillment

Once the Sales order has been submitted by Brightree and picked up by VGM, the sales orders may be rejected by VGM at two stages in the workflow.

Upon initial receipt of the file, Unilink will perform a validation check on the sales order. Unilink validation check includes:

      i. Validate the Order Number, Fulfillment Vendor, Address 1, City, State, Postal Code, Item Number, and Quantity fields are not empty
     ii. Validate the City is at least 2 characters long.
   iii. Validate the State is exactly a 2-character abbreviation.
   iv. Validate the Postal Code is at least 3 characters.
    v. Validate the Quantity is numeric and non-zero.

Sales orders that do not pass the validation are rejected by Unilink. If one item on the sales order does not meet the above criteria, Unilink will reject the entire sales order. Unilink will send an email to confirm rejection of the sales order. The email will contain the Sales Order number and the reason for the rejection.
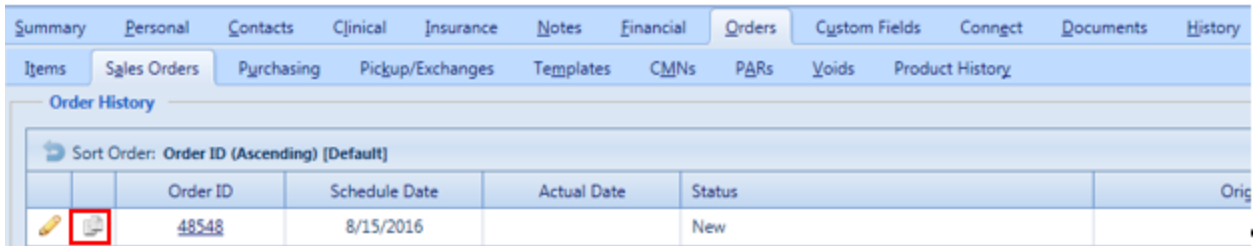
Sales orders that pass the Unilink validation check will be reviewed by VGM and may be rejected if the data in the sales order cannot be accepted by VGM to fill the Sales Order. An example would include; the Item number sent to VGM does not match the Manufacturer Item Number. VGM will provide a report, directly to the provider, each day of any rejected orders. If one line on the order is rejected, the entire order will be rejected.

Note: When notification is received of a rejected order, the order must be resubmitted following the instructions in the following section: Resubmitting Sales Orders.

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6. Resubmitting Sales Orders

Once Unilink or VGM notifies users of a rejected order, users will need to resubmit the order in Brightree. Users should make a copy of the rejected order by using the Double Paper icon next to the Sales Order:

There are 2 ways to copy a Sales Order in the system:

OPTION 1

1. Go to Ordering/Sales Orders.

2. In the Order Number field put in the sales order number and click Search button on top right of screen.

3. Once the sales order has been searched it should populate on the screen with a Double Paper icon next to it. You will need to click that Double Paper icon next to the sales order to copy the sales order.

OPTION 2

1. Go to Ordering/Patients.

2. Pull up and search the patient you are needing to pull up in the system.

3. Once the patient's account is pulled up you will need to click the Orders tab.

4. Once you have the Orders tab open on the patient's main account you will then need to look at the second row of tabs and click the tab that says "Sales Orders" on it.

5. Once you have the Sales Orders tab open you can see there will be a Double Paper icon next to every sales order ever created on the patient's account and you can copy any one of those sales order by clicking on the Double Paper icon.

Once copied, void the rejected order and complete the needed changes on the new order. Brightree will transmit the new order to VGM when all required fields have been completed.

Orders submitted on weekends will be available for VGM to pick up with the 3am cycle on the first business day of the following week.

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7. Perpetually Tracking VGM Inventory through the Brightree System

As a Brightree customer there are a few options available for tracking your inventory distributed through the VGM center. Various options are provided below that may best fit your company's workflow in completing this task.

Regardless of the inventory method that is used, VGM will send nightly 810 reports that include the shipment tracking numbers. The tracking numbers will be populated and accessible on the Brightree sales order. To help facilitate the confirmation process, Brightree also allows the receipt of the tracking number to update the sales order with an actual date and will change the sales order status from New to Delivered. This is discussed in the Site Settings section of this guide.

Creating an inventory location called VGM will help facilitate the processing of any method you adopt and keep it separate from your in-house stock.

1.Purchase Request/ Purchase Order from the Sales Order

Utilizing a purchase request allows the creation of a single requisition of all items needed for reorder regardless of the vendor. A purchase request can be created from the purchasing tab of the sales order. It is recommended that a new purchase request be created for each VGM sales order. This will allow the purchase request to be processed to a purchase order that will be received into Brightree during the confirmation process.

A second option is to create a single purchase request and add items from multiple sales orders to the existing purchase request throughout the day. This option will allow quantities to be received in bulk on one purchase order per vendor. However, these purchase orders may include some items that have shipped and others that have not.

2. Monthly Purchase Transaction for Non-Serialized Items

Once you have created an inventory location for your VGM orders, you may decide to add item quantities to this location through a purchase transaction to avoid creating individual purchase requests as described above.

This will insure that you have quantities on hand to allow sales order confirmation. If you use this method, it is important that you enter the item cost for each product as well as the anticipated quantity to be dispensed monthly (or some defined interval) as part of the purchase transaction.

This will inflate your inventory value at this location. You may also choose to reconcile these quantities at the end of each month through an inventory adjustment. This guide does not detail all of the transactions or reporting considerations of using this method.

Therefore, it is recommended that you contact your Brightree Account Manager for further discussion. Connect customers should always consult their Connect Account Manager before making any changes related to sleep resupply.

3. Creating Basic Items for VGM Orders

You might be tracking quantities and cost in your Brightree inventory locations today. Basic items can be created and associated to your VGM inventory location. This will allow items to be placed on sales orders without tracking inventory quantities or cost in this virtual location. Keep in mind that you cannot duplicate a Brightree Item ID.

However, you can duplicate the Vendor ID which will allow you to use a different Brightree item for VGM fulfillment than you are using in your physical location. With this method, you will track your quantity and cost outside of Brightree. Connect customers should consult their Connect Account Manager before making this change as it will directly impact their existing Connect sales order templates.

If you are already using Basic items, you may not have to create new items for VGM fulfillment. You will have to ensure that the Brightree Item ID or Manufacturer Item ID follows the guidelines discussed in the *Setting Up VGM Items for Sales Orders* section of this guide.

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