

Adding a Buying Group Type Customer

A Buying Group type customer is a headquarter or bill-to location that is not a manufacturer or a distributor. This can be a GPO – Group Purchasing Organization – or a chain entity. A Buying Group customer will always be the owner of an indirect contract.

To add a new buying group type customer, navigate to Contract Core -> Customer Maintenance -> Add. The Customer Header will open.

Customer Header - TEST BUYING GROUP

1. Header 2. Alias 3. Relationship

Customer Type: BUYING GROUP

COT: BUYING GROUP Effective Start Date:

340B Entity:

Territory: UNKNOWN

Reference ID: TEST BG1110 - MLR

Name: TEST BUYING GROUP - MLR

Address 1: 1234 Main Street

Address 2:

Address 3:

City: PEMBERTON State: NEW JERSEY

Zip Code: 08068 Country: United States

Contact:

Email:

Phone:

Fax:

Dispensing Status Utilization Duplicate Submission Validation:

Level: Parent Child

Notes:

On the customer type drop-down, select BUYING GROUP.

Fill in the required customer details, then hit SAVE to add a new customer.

For Buying Group customers, the level will always default to PARENT; this cannot be changed.

Save

Buying Group Type Customer Header

Refer to the table below when filling out the customer header for BUYING GROUP type customers:

Field	Description
Class of Trade (Required)	Select the COT of the entity – BUYING GROUP, CHAIN, GPO, etc.
340B Entity	Check the box to exclude sales in Government Pricing.
Territory (Required)	Select a territory from the territory drop-down menu; defaults to UNKNOWN.
Reference Id (Required)	This field contains an Internal / Industry account number for the customer. It is displayed in most screens throughout the application. In Reporting/Analytics the Reference ID = Customer_Ref_ID field.
Name (Required)	Enter the name of the customer.
Address	Enter the customer's address.

City (Required)	Enter the customer's city.
State (Required)	Enter the customer's state.
Zip Code (Required)	Enter the customer's zip code. This field is optional if the country is outside of the USA.
Country	Choose the customer's country from the drop-down menu; defaults to USA.
E-mail	Enter the customer's email address.
Phone	Enter the customer's phone number.
Fax	Enter the customer's fax number.
Level (Required)	Defaults to the Parent level. This field cannot be changed.

After filling in all required fields, press the SAVE button.

If there are no errors, Tab 2. Alias will automatically open.

Buying Group Aliases

An internal alias is required for a Buying Group.

The system will automatically populate the Reference ID input on the Customer Header as the MAIN INDICATOR with a reference type INTERNAL.

Additional aliases can be added, if needed, by selecting the ADD NEW ALIAS button.

The screenshot shows the 'Alias - TEST BUYING GROUP' interface with the following callouts:

- Callout 1:** Points to the 'Add New Alias' button. Text: "To add a new alias, click the ADD NEW ALIAS button."
- Callout 2:** Points to the 'Reference id' and 'Reference Type' fields in a table row. Text: "Fill in the desired Reference ID, select a Reference Type from the drop-down, then hit save."
- Callout 3:** Points to the 'Change' button in a table row. Text: "To change or update an existing alias, click the CHANGE button next to the desired alias." Below this, it says: "Update Reference ID/Reference Type and Main Indicator status as desired."

The interface includes a navigation bar with tabs: Contract Core, Chargeback Payer, Rebate Payer, Utilization Payer, Government Pricing, Medicaid Payer, Medicare Payer, Gross To Net, Forecasting, and Reporting/Analytics. The main content area has tabs for 1. Header, 2. Alias (selected), and 3. Relationship. A table lists aliases with columns for Message, Main Indicator, Reference id, Reference Type, First Assigned, and Last Assigned. The table contains one row with Main Indicator 'Y', Reference id '01VC', and Reference Type 'INTERNAL'. Buttons for 'Add New Alias', 'Export To Excel', 'Change', and 'Delete' are visible.

Once all of the appropriate aliases have been added, click on the NEXT button to continue to Tab 3. Relationship.

Relationships for Buying Groups

The Customer Relationships header will open.

When reviewing the customer relationships header for a Buying Group, the application will not display a list of connections by default.

A Buying Group type customer can be connected to:

- 1) Purchasers, ship-to locations that are not wholesalers or distributors. A purchaser type customer can only be connected to a buying group.
- 2) Vendors, if they purchase on contracts that are owned by the Buying Group.
- 3) Buying Groups

**Any customer that will purchase on a Buying Group contract must be a member of the buying group.*

Purchaser Membership can be loaded and maintained using the **Multi Contract Group Membership** interface.

To add a customer relationship to a buying group, you can:

- Enter a customer name or reference ID, if you know it.
- Search by Trade Class
- View by the following classifications via drop-down menu:

MEMBERS – Will show all currently attached members/relationships connected to the Buying Group.

NON-MEMBERS – Will show all customers in the system that are not currently members of the Buying Group.

ALL – Will show all eligible customers/entities that can be added to the buying group.

Note: Because a Buying Group type customer can have a relationship with any other customer type, you will see all customers with entries in the system.

Once you've entered your desired search criteria, hit GO.

A list of eligible connections will be displayed.

To view customer details, click on the customer Reference ID.

This will open up the Customer Header for the customer.

Contract Core Chargeback Payer Rebate Payer Utilization Payer Government Pricing Medicaid Payer Medicare Payer Gross To Net Forecasting Reporting/Analytics

Customer Relationships - TEST BUYING GROUP

1. Header 2. Alias 3. Relationship

Relationships

Customer:

Trade Class:

All Members Non-Members

To add a relationship, click the checkbox next to the desired customer, then hit SAVE.

Customer Type

Reference	Member Name	Type	COT	City	State	Country	Zip	Status	Message
<input checked="" type="checkbox"/> B23782315	TEST PURCHASER HOSP	PURCHASER	HOSPITAL	PEMBERTON	NJ	USA	08068	A	
<input checked="" type="checkbox"/> B45871239	TEST PURCHASER CLINIC	PURCHASER	CLINIC	PEMBERTON	NJ	USA	08068	A	
<input checked="" type="checkbox"/> MLR001VC	TEST VENDOR CHILD 001	VENDOR	DIST	BROWNS MILLS	NJ	USA	08015	A	

To add a relationship, click the checkbox next to the desired customer, then hit the SAVE button.
To remove a relationship, uncheck the checkbox, then hit SAVE.