VM3COP20.13

Sending Samples and Sale or Returns

Sending Samples

1. Gain authorization from a Director.

2. Create a new SOR record by clicking "Add a new sale/return" on the main Sale or Return page, then enter the customer or hospital name in the search field and click the relevant result.

3. Fill in the details of the customer including contact name, telephone, email and department, then click "Submit". The customer record now appears in the top section of the main Sale or Return page with its own unique SOR reference number.

4. On the main Sale or Return page in Intrastats, click the link at the bottom "Request new stock item to be scanned to Sale or Return". Fill in the issue detailing the part number(s) and quantity required (note: ensure that you use the single sample part number if the item is normally supplied as a pack). Request can also be made via Intrastats Warehouse Requests.

5. Send the issue to Picking/Packing, print out the issue and place in an appropriate picking tray. Note: if the item is urgent, also inform Picking/Packing verbally.

6. Once you have confirmation from Picking/Packing that the items have been scanned, you need to add them to the SOR record. In the top list `Sale Returns Not Sent / In Preparation` click the icon in the Add column for the correct customer.

7. From the `Barcode` drop-down on the next page, select the item you want to send.

8. In the field entitled "Purpose of Device", enter a brief explanation of the use of the item (if unsure, the Opera description will suffice), for example "SpO2 sensor for Viamed pulse oximeter" or "Phototherapy Eye Mask".

9. In the field entitled "The trial/testing to be undertaken by the authority (if any)" put a brief summary, for example "Free of charge sample for evaluation"

10. In the drop-down box next to the "Submit" button, select "Giving", then click "Submit".

11. Navigate to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note depending upon the location of the customer (England, Wales and Northern Ireland use the same form, Scotland has its own).

12. Save the PDF to the correct month in U drive, link to the customer in Goldmine and print the resulting PDF.

13. Print out the NHS Delivery Note and have it signed in the correct section by the appropriate Sales Manager or a Director. For samples, diagonally strike through form A, and sign form B, which passes ownership of the goods to the customer. We sign on behalf of the Supplier, leaving the Authority section blank for the customer's own use.

14. On the main Sale Or Return screen, click the link `Viamed Product Trial Feedback Form` and print the form linked on the on the next page out. This will be sent with the goods to allow the customer to offer feedback.

15. Write a covering letter stating that the goods are being supplied as free of charge samples. For an example, see VM3COP20.132; please ensure to amend as necessary and read carefully to ensure that the content is appropriate. Take the letter, signed NHS Delivery Note, feedback form, product leaflet and price list to Picking/Packing. If the item is a pre-prepared sample pack, check whether it already contains a leaflet and price list.

16. On the main Sale or Return page, the picker/packer needs to click the "Send" link and enter the tracking details and any other relevant shipping information.

17. The picker/packer needs to adjust the items out of Opera using the reference "Sample".

18. The sender needs to schedule themselves a follow up to determine the outcome of the evaluation, or if the samples were requested by a Viamed representative, inform the representative that the goods were sent so that they can schedule themselves an issue to follow up.

Sending Items on Sale or Return

1. In Intrastats go to Stock>Sale Or Returns: this is the main Sale Or Return screen. Near the top of the page is a link `Product Trial - Sale or Return Terms and Conditions`, click this link and the link on the following page to bring up the SOR Terms & Conditions Form. Save this form to PDF and email to the customer, alternatively you can print it and fax or post it.

2. Note: we need this signing and returning before dispatching any goods. Scan the signed Terms and Conditions Form, save it to the correct month folder on U drive and link it to the customer contact record in Goldmine.

3. Create a new SOR record by clicking "Add a new sale/return" on the main Sale or Return page, then enter the customer or hospital name in the search field and click the relevant result.

4. Fill in the details of the customer including contact name, telephone, email and department, then click "Submit". The customer record now appears in the top section of the main Sale or Return page with its own unique SOR reference number.

5. On the main Sale or Return page in Intrastats, click the link at the bottom: "Request new stock item to be scanned to Sale or Return". Fill in the issue detailing the part number(s) and quantity required (note: ensure that you use the single sample part number if the item is normally supplied as a pack). Request can also be made via Intrastats Warehouse Requests.

6. Send the issue to Picking/Packing, print out the issue and place in an appropriate picking tray. Note: if the item is urgent, also inform Picking/Packing verbally.

7. Once you have confirmation from Picking/Packing that the items have been scanned, you need to add them to the SOR record. In the top list `Sale Returns Not Sent / In Preparation` click the icon in the Add column for the correct customer.

8. From the `Barcode` drop-down on the next page, select the item you want to send.

9. In the `Purpose of Device` field, add a short summary eg "Measuring concentration of oxygen".

10. In the `The trial/testing to be undertaken by the authority (if any)` field, type "Sale Or Return trail to determine suitability prior to purchase" for reusable items, or an alternative appropriate comment if there is another aspect to the loan, for example: "Service exchange loan".

11. In the `Loan/Giving` drop-down, select `Loan` for items that we expect the customer to purchase or return. If we are sending consumables that we don't expect back, such as disposable SpO2 sensors with a pulse-oximeter, use the `Giving` option.

12. Click `Submit`.

13. Repeat for every item; so if, for example, you are sending an AX300, also repeat to add the oxygen sensor.

14. For additional items, amend the `Purpose of Device` field as necessary, for example "Oxygen sensor for use with AX300 oxygen analyser".

15. Navigate to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note depending upon the location of the customer (England, Wales and Northern Ireland use the same form, Scotland has its own).

16. Save the PDF to the correct month in U drive, link to the customer in Goldmine and print the resulting PDF.

17. Print out the NHS Delivery Note and have it signed in the correct section by the appropriate Sales Manager or a Director. Note: Form A is for items on loan, Form B is for items that we are giving away. Signing the wrong form can mean that we sign over the ownership of the goods, so immediately diagonally strike-through the part of the form that you are not using so that no-one can accidentally or fraudulently sign it. We sign on behalf of the Supplier, leaving the Authority section blank for the customer's own use.

18. On the main Sale Or Return screen, click the link `Viamed Product Trial Feedback Form` and print the form linked on the on the next page out. This will be sent with the goods to allow the customer to offer feedback.

19. Create an Opera quotation that has the words "Goods already supplied on Sale Or Return, ref. SOR___" in the notes at the bottom, adding the SOR ref that can be found on the summary page that you printed earlier.

20. Write a covering letter stating that the goods are being supplied on a Sale Or Return basis. For an example, see VM3COP20.131; please ensure to amend as necessary and read carefully to ensure that the content is appropriate. Save the PDF to the correct month in U drive, link to the customer in Goldmine and print the resulting PDF.

21. Add a leaflet and price list and give all of the paperwork to Goods Out, who will complete the process by putting the paperwork with the goods, clicking the `Send` button on the main Sale Or Return page and adding the tracking details.

22. Set yourself a follow up issue, as it will be your own responsibility to follow up with the customer to attempt to gain a Purchase Order or retrieve the goods.

23. When the goods have been sent, they move into the lower table on the main Sale Or Return page in the section `Items Out on Sale / Return`, with a colour coding to indicate their status: blue items are within the original 30-day trial period, green items are out of their original 30-day trial period and require following up, red items are overdue.

24. Note: trials can be extended or turn into long-term loans, so not every red item indicates a problem, however, these need to be monitored regularly with the intention of resolving any that can be resolved.

25. When items are being despatched, the packer needs to click the Send button on the main Sale Or Return page and enter tracking information.