VM3COP20.30 – UK Order Processing – Viamed

Things to remember:

- Every order NEEDS a hospital/company name, department (for hospitals), street name, town/city and postcode

- Applicable memos typed in the notes section on the order processing screen.

- All NHS orders must have a purchase order number

- If pre-payment has been made, make sure you attach copy to ‘Payment Notification if applicable’ and click ‘Order Prepaid’.

- Should the customer wish to pay for an order by Debit/Credit Card/Visa Card (we do NOT accept American Express) then follow *VM3COP03.02 ‘Processing A Card Payment’* and click the box next to ‘Card Payment’, to show card payment was required and also click ‘Order Prepaid’ to show payment has been taken.

  Card payments should only be taken for UK orders, unless agreed with Accounts.

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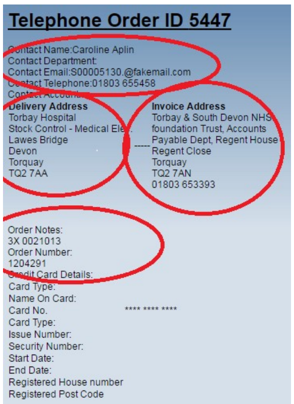
Receiving Orders

Orders most frequently arrive via email, but they may also be faxed, sent through an e-procurement system or sent in the post; some customers also order over the telephone or upload directly to our website.

E-procurement System Orders

When an order is sent to Viamed through an e-procurement system, an email will be received. Follow procedures VM3COP03.06 for Cardea, and VM3COP27.30 for Catalog360 Circle.

Telephone Orders

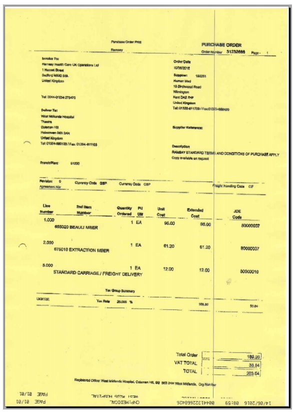

Telephone Order ID 5447
Contact Name:Caroline Aplin
Contact Department:
Contact Email:S00005130.@fakemail.com
Contact Telephone:01803 655458
Contact Account:
Delivery Address
Torbay Hospital
Stock Control - Medical Ele...
Lawes Bridge
Devon
Torquay
TQ2 7AA
Invoice Address
Torbay & South Devon NHS foundation Trust, Accounts Payable Dept, Regent House
Regent Close
Torquay
TQ2 7AN
01803 653393
Order Notes:
3X 0021013
Order Number:
1204291
Credit Card Details:
Card Type:
Name On Card:
Card No. **** **** ****
Card Type:
Issue Number:
Security Number:
Start Date:
End Date:
Registered House number
Registered Post Code

A telephone order will appear as shown to the left. The delivery and invoices addresses are noted, as are the contact's name, order number and product details.

If you have taken the order yourself, this needs to be printed to PDF before processing.

Please see VM3COP27.29 for details on how to take a telephone order.

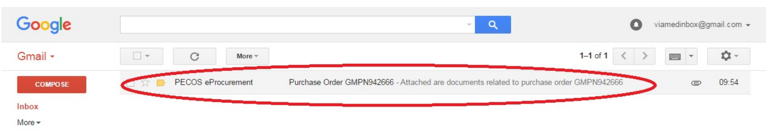
Fax Orders



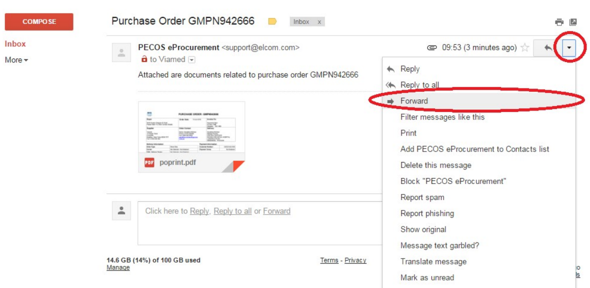
Orders which arrive via fax will appear the same way as an email PDF order and should be processed normally. They are sent to fax@viamed.co.uk

Please remember to acknowledge the order and advise of expected dispatch date by email if an email address has been supplied, or by fax if no email address is available on the purchase order or IntraStats Customer Relationship Management (CRM) system.

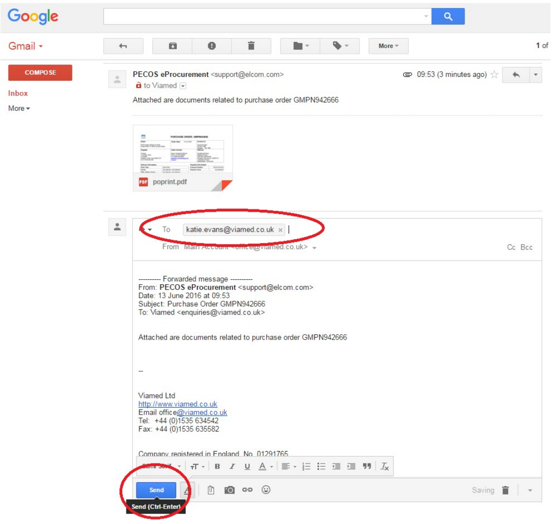
Email Orders



When an order is received in the main inbox, click on it to open it.

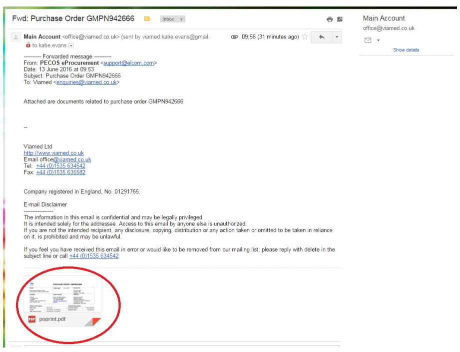


Click the arrow on the right and click forward.

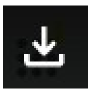


Type your vmsecure into the ‘To:’ field and click send. E.g. firstname.lastname@vmsecure.me.uk

When the email arrives in your inbox, click on it to open it



Click on the attachment, where provided, to open it.

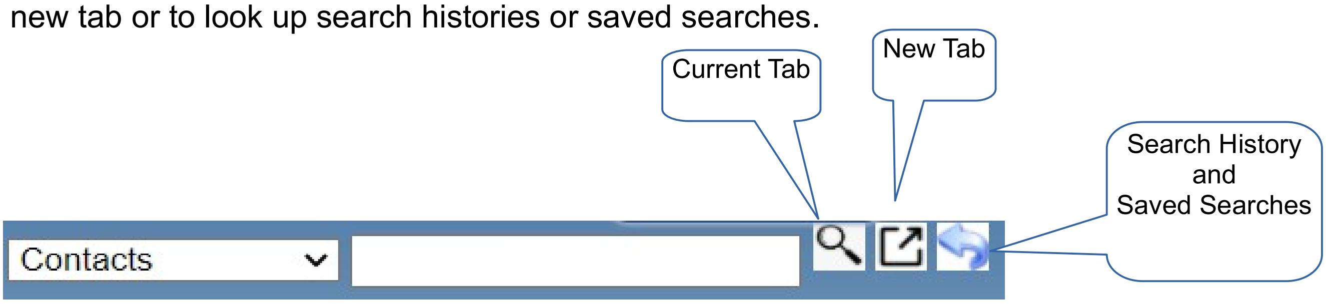


Click the download button at the top of the page and open to view contents. Please be aware of where this is downloaded to as you will need it later to upload to the order processing page.

Follow the steps on VM3COP20.16 for eBay for downloading the documents then following the order processing procedure below.

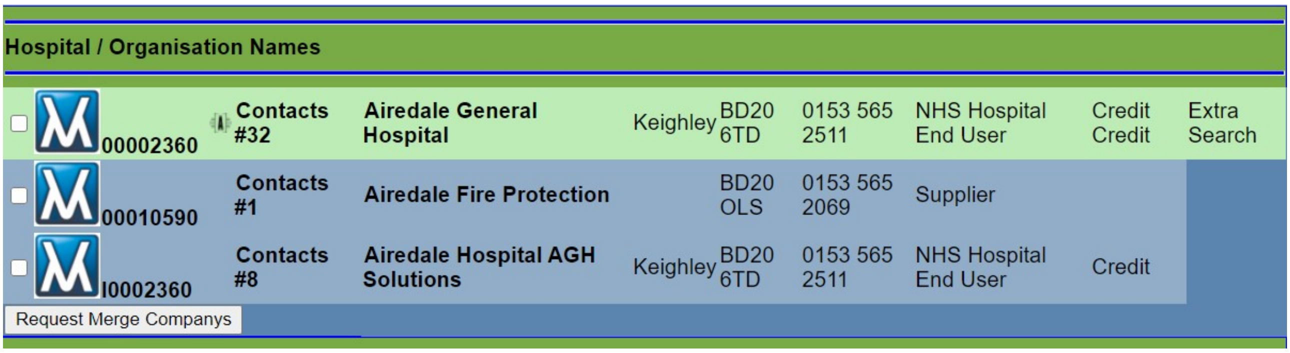
Order Processing

From IntraStats, using the drop-down menu at the top right of any screen, click the arrow and select ‘Contacts’, in the Search box type the name of the Company, on the Delivery Adress, you wish to process the order for. Use the following buttons to open in current tab, new tab or to look up search histories or saved searches.



Click the hospital/company name you are processing the order for. Any line highlighted in green is an account which has been used recently within the new system.

For example Airedale Hospital…



This will open up a page similar to this:

NOTE: Please check the email address, telephone number and title are still correct.

Scroll down below the account names and review if there is an outstanding “Information Request” or “Sales Project” for that order. If so, inform originator of project and once order has been processed add CVM number to stage “Customer Purchased” or “Purchase Order Received” – template dependant as per VM3COP20.94.

On the order PDF, find the contact name. Then find this name on the company/hospital list on Intrastats and click the Add S.O. button to the left of the name.

This opens the customer order processing page, it will also show you the order number beginning:

- CVM (for Viamed orders)
- CAN (for Vandagraph orders)
- CST (for VST orders)

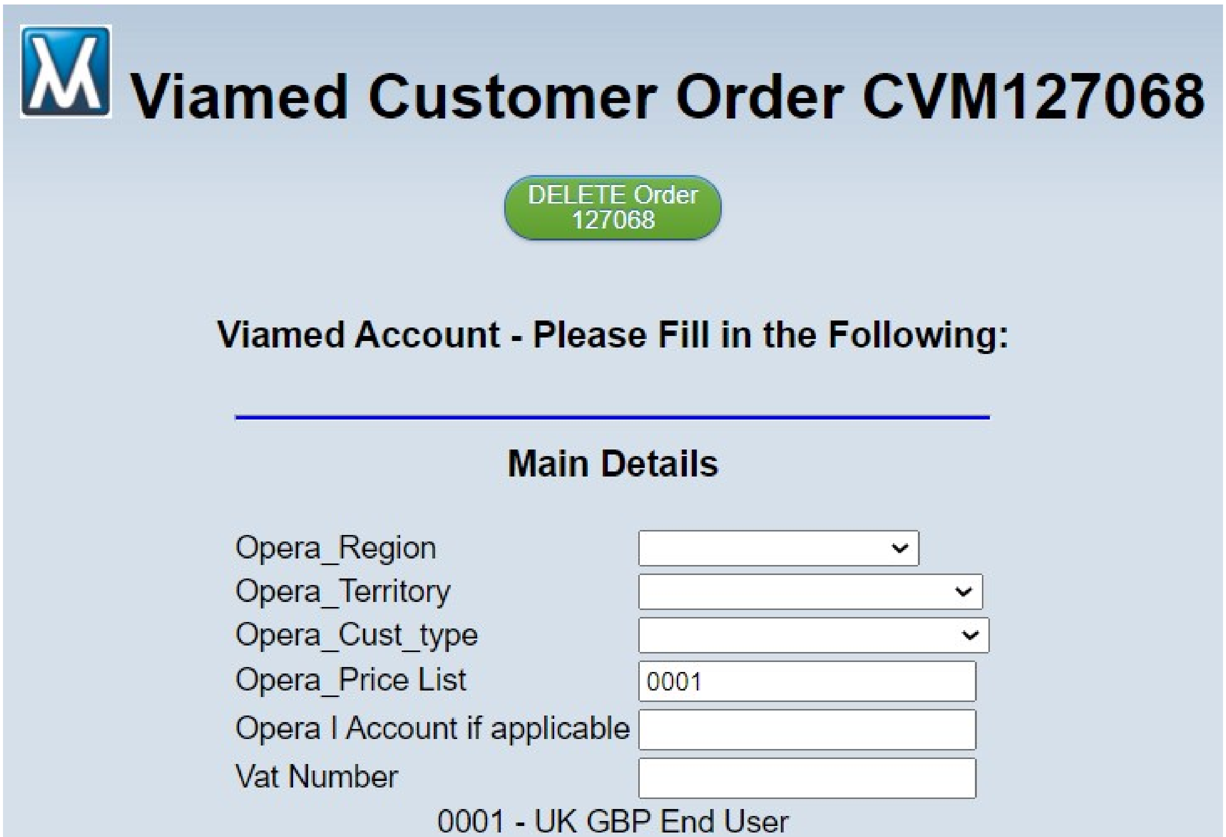
If the ‘Add S.O.’ button does not show, please follow these steps:

1. Go to Main Details page, and check that there is a ‘Price List to Use’ selected.

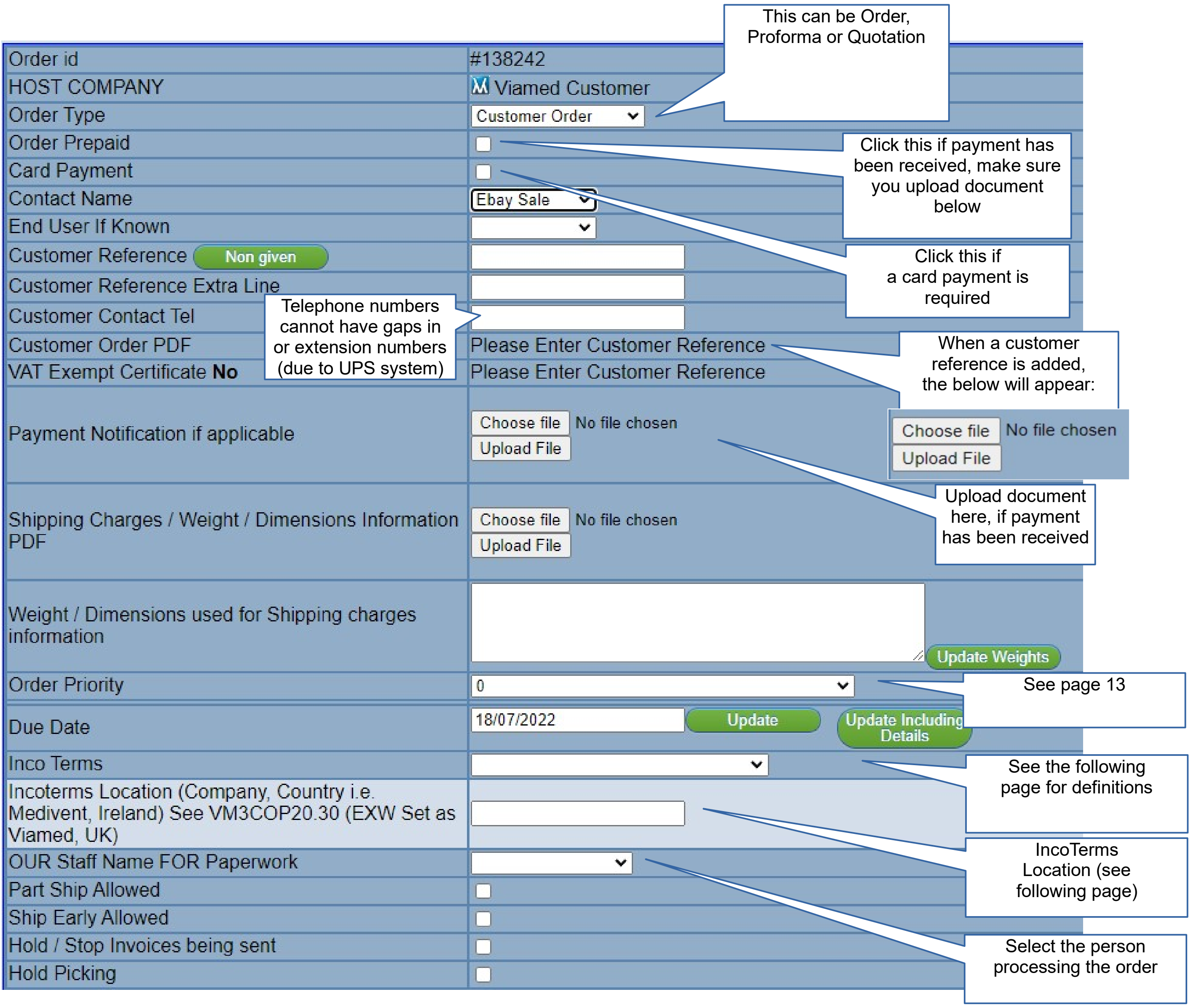
2. Edit the contact who you want to assign the order to, scroll to the bottom of the page and check that ‘Allow Sales Order’ is ticked.

3. Scroll to the top of the page and click ‘Update Details Below’ button.

Depending if this account has been used before, you may be required to fill in some additional information, see below:



Returning to create the order you are processing, please make sure all fields are completed:



Order id	#138242
HOST COMPANY	Viamed Customer
Order Type	Customer Order
Order Prepaid	☐
Card Payment	☐
Contact Name	Ebay Sale
End User If Known	
Customer Reference Non given	
Customer Reference Extra Line	
Customer Contact Tel	
Customer Order PDF	Please Enter Customer Reference
VAT Exempt Certificate **No**	Please Enter Customer Reference
Payment Notification if applicable	Choose file No file chosen Upload File
Shipping Charges / Weight / Dimensions Information PDF	Choose file No file chosen Upload File
Weight / Dimensions used for Shipping charges information	Update Weights
Order Priority	0
Due Date	18/07/2022 Update Update Including Details
Inco Terms	
Incoterms Location (Company, Country i.e. Medivent, Ireland) See VM3COP20.30 (EXW Set as Viamed, UK)	
OUR Staff Name FOR Paperwork	
Part Ship Allowed	☐
Ship Early Allowed	☐
Hold / Stop Invoices being sent	☐
Hold Picking	☐

Make sure any telephone numbers above do not have any spaces.
Note: All NHS customers MUST provide a valid purchase order number.

Account Memos - Check if there are any account memos for this order, this can be found by hovering over the text “Account Memo (Hover to read)” at the top of the screen.

Account Memo (Hover to read)

Incoterms 2020

Incoterms should be set on the CRM account main details page. When an order is created and the field is not prefilled, you will need to select the relevant code from the drop-down and update the main accounts details for the account, this will then be automatically filled when a new order is generated.

The *IncoTerms Location* should also be prefilled from the main account details, if not, please complete with the relevant details as noted below. Then update the main details page of the account so that is prefills on future orders.

Note: Once an order is started, any prefilled data that is not already completed in the CRM main details page will not prefill your order. If you update the main details page after generating an order number it will not reflect on the order. Please fill it in on both the main details page and the order before proceeding.

<u>EXW – Ex-Works</u>

These are shipments, which once they have been collected by the courier or customer and have gone over the threshold of our premises, are the responsibility of the buyer.
For example UPS (own account only), DHL, Kuehne + Nagel.
Location will always be **Viamed, UK.**

Top section of order: **EXW** (dropdown)**, IncoTerms Location: Viamed, UK**

Stock Delivery Line: EXW
Memo:
Consigned to: “Courier”, account *******
Example - **Consigned to: TNT, account** *******

<u>CPT – Carriage Paid to</u>

Examples of this type of shipment are UPS and Royal Mail where Viamed has contracted the courier and is paying the invoice for the service. This is where we charge the customer a carriage cost, also where carriage is included in the price of the product i.e. Posey Wraps within the UK.

IncoTerms Location: “**Company/Hospital/Agreed Location”** i.e. airport, dock
(agreed location to which a shipment is expected to arrive) “**, Country”**.

Top section of order: **CPT (dropdown),** *Example* IncoTerms Location: **Medivent, Ireland)**

Note: Should the order be for an end user then the location would be the **City, Country** rather than Company, Country.

<u>CIP – Carriage and Insurance Paid</u>

Similar to CPT, examples of this type of shipment are UPS, where Viamed has contracted the courier and is paying the invoice from the courier for the service. This is where we charge the customer a carriage cost, also where carriage is included in the price of the product i.e. Posey Wraps within the UK. **All UK customers are now CIP.**

The difference between CPT and CIP is that insurance can also listed as a separate line (predominantly Export) and charged to the customer on the invoice to cover the shipment. *Within the UK, Viamed take responsibility for the insurance and therefore the insurance line is not added.*

Note: Please make sure that if you change the Incoterms on an order, that you change any related field. For example, amending the carriage line to EXW, also requires the IncoTerms to be amended to EXW.

(See page 13 for insurance charges)

IncoTerms Location: **"Company/Hospital/Agreed Location" i.e. airport, dock (agreed location to which a shipment is expected to arrive) ", Country".**

Top section of order: CPT (dropdown), *Example* IncoTerms Location: **Medivent, Ireland** or **Airedale General Hospital, UK.**

Note: Should the order be for an end user then the location would be the **City, Country** rather than Company, Country.

Carriage / Delivery Codes

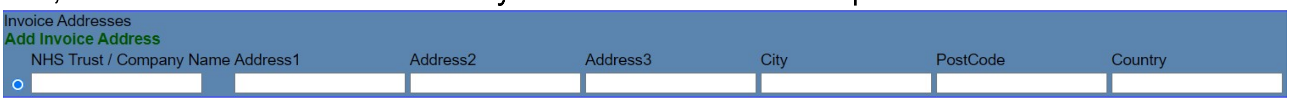
From the products ordered, establish which courier is suitable utilising the Customer Postage Pricing documents VM3COP03.011 and VM3COP20.34. If the customer would like to use their own courier, enter the 'Priority' as '2' and enter the 'Due' date as per cut-off times listed on the Customer Postage Pricing document VM3COP03.011 and VM3COP20.34.

This document also advises if the appropriate courier is UPS or Royal Mail for the most popular products; alternatively, check the Intrastats Stock page. Enter the appropriate 'Priority' code and 'Due' date as per cut-off times.

Priority 1 – Urgent order to be processed immediately (only to be used when the purchase order/customer states it is urgent or **MUST** be shipped the same day) – **see page 16.**
Priority 2 – Courier other than UPS or Royal Mail
Priority 3 – UPS – all services
Priority 4 – Royal Mail – all services

Invoice and Delivery Address

From the purchase order please select, using the white circle radio button to the left of the line, the correct invoice and delivery addresses from the list provided.

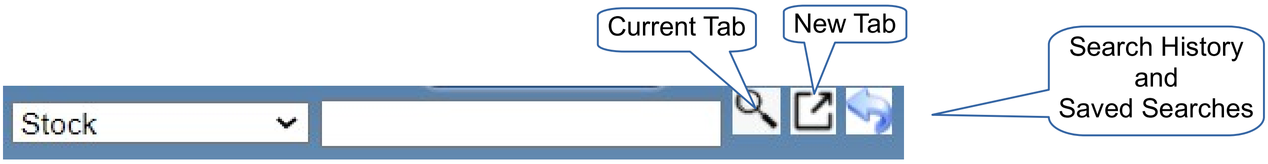


Should the relevant address not be included please click ‘Add Invoice Address’ or ‘Add Delivery Address’, this will refresh the page and provide you with fields to input.

IMPORTANT: A contact name is not needed in addresses when the goods are being shipped by UPS. This is because when the UPS label is created, it takes the name from the contact on our CVM and adds it to the delivery address. It is also not required to include UK counties. Please do not include commas in any addresses, or more than one gap between words.

Check Stock Quantities

Using the drop-down menu to the top right of any Intrastats screen. Click the arrow and select ‘Stock’, in the search box for the part number and click the relevant icon, as below.



When you have found the product code you require, click on the BOX icon to display the current stock levels.
If there is no stock, please make sure you inform the customer and provide a lead-time, where possible. If alternatives are available, you may provide them with these options also.

You should also check the ‘£’ page and check if the item requires a carriage charge. Currencies and customers that qualify for free carriage have a statement highlighted in blue next to their price.

For distributor and automotive carriage charges, see VM3COP20.34

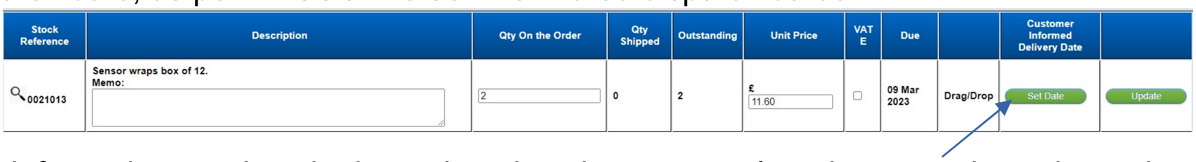
Check these details for all products listed on the purchase order.

If these details are incorrect or if applicable carriage charges have not been added to the purchase order, return to the order processing page and change the priority to ‘8’, please contact the customer before proceeding. Contact the customer by telephone, if possible, but email if they are unavailable. Please add any correspondence or notes to goods out on the notes section.

Add memo to order to confirm stock availability has been checked and is ok.

Customer Informed Delivery Date

Should an item be out of stock, please make sure you confirm to the customer an estimated dispatch date, as per VM3COP20.302 Estimated dispatch dates.



Stock Reference	Description	Qty On the Order	Qty Shipped	Outstanding	Unit Price	VAT E	Due		Customer Informed Delivery Date	
0021013	Sensor wraps box of 12. Memo:	2	0	2	£ 11.60		09 Mar 2023	Drag/Drop	Set Date	Update

This information needs to be logged against the customer’s order, open the order and on the stock line which is out of stock, “Set Date” to approximate date you have told the customer. If you have provided e.g. 4-6 weeks lead time, please add the date of 6 weeks from the date of informing the customer.

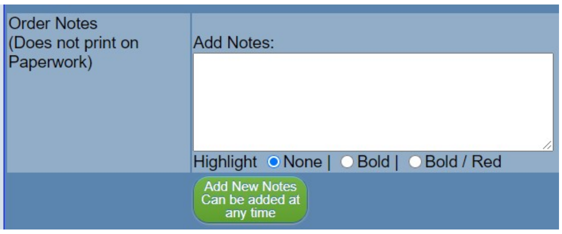
Reviewing Estimated Dispatch Dates

Periodically the “Customer Informed Date” page should be reviewed and determine if the estimated date have passed.

If passed, review the PO log, should there not be a updated date, search the main inbox for an update. If no update can be found please chase with our purchasing manager to chase an update from the supplier.
Once an update is received, update the orders “Customer Informed Delivery Date” and inform the customer of the delay.

Order Notes

Add any notes in the orders notes text box on the order processing page of any contact you have had with the customer and their response. If the customer accepts the changes and is happy to proceed, change the priority back to the appropriate number and proceed to checking.

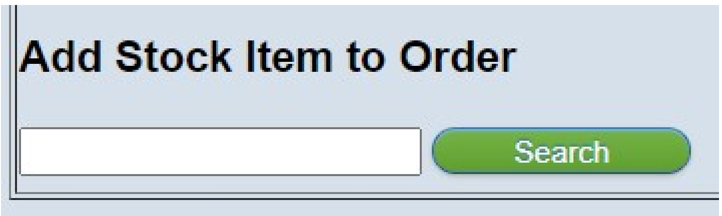


Note: ALL orders must be entered into IntraStats even if awaiting action so please continue adding the order by following this procedure but leave on a priority 8 until agreed with the customer to proceed. When taking an order off priority 8, please make sure you add notes so that the checker and goods out are aware this has been changed correctly.

Please be aware: Part shipments are only to be offered if complete lines items are in stock. See page 13 regarding insurance.

Should carriage be chargeable on an order and is accept by the customer, a copy of the email stating this must be attached to the order. A revised copy of the order is not required.

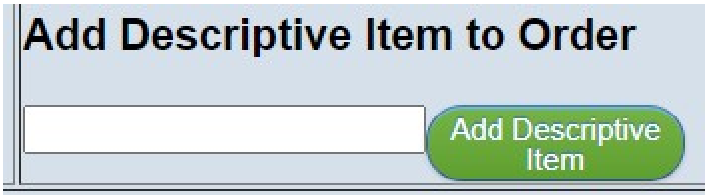
Adding Stock



When you are satisfied that all the prices and carriage charges are correct, return to the customers CVM in IntraStats and proceed as follows. Make sure you leave on a priority 8 if you are still waiting for confirmation from the customer. When taking an order off priority 8, please make sure you add notes so that the

Enter the part number in the ‘Add Stock Item to Order’ box.

Should there be no part number, items can be added in the 'Descriptive Item' box.



Enter the quantity required, please note the price should change accordingly if quantity discounts are available.

Ensure the pricing and quantities are correct before proceeding. When confirming a price discrepancy on a purchase order, we must ensure that we advise the customer whether the price is simply incorrect or whether a price break applies to the quantity that they have ordered.

Once happy all information is correct, click 'Add to Order'.

When all items on the purchase order have been entered, the carriage must be added.
All Viamed orders must include a carriage line.

Contract Pricing

Please be aware that Contract Pricing is automatically applied and will shown as per the below (* Contract Price Auto Selected)

Carriage Charges and Codes

To establish which courier to use, check the 'UK Postage Pricing Guide' document VM3COP03.011 and VM3COP20.34 for automotive and distributor postage pricing.

For example, for Royal Mail, enter 'PPRD' into the 'Add Stock Item to Order' box; for UK UPS, enter 'PPUPS1' into the 'Add Stock Item to Order' box.

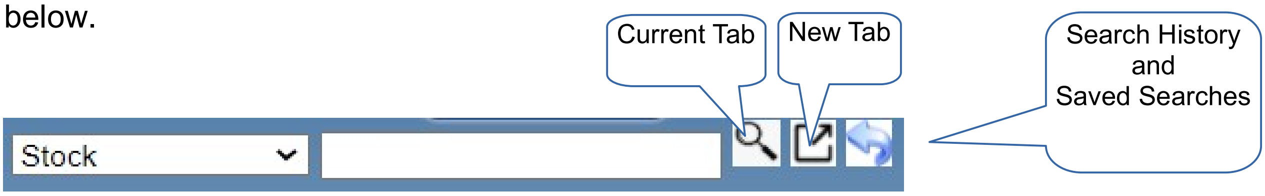
In some circumstances, customers may request express or special deliveries, refer to VM3COP03.01 to choose the correct reference number. Quantity should always be 1 unless advised otherwise by Goods Out.

Enter the required price into the 'Unit Price' box, leave blank if the order qualifies for free carriage, click 'Add to Order' to complete the line.

If you are unsure of which courier to use or of how much carriage to charge, check the IntraStats memos or check with colleagues in the office / Goods Out department.

Stock Memos

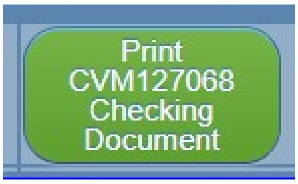
To check a stock memo, use the drop-down menu to the top right of any screen. Click the arrow and select ‘Stock’, in the search box for the part number and click the relevant icon, as below.



Type in the part number or description required and click the new tab icon so that it opens the stock search in a separate tab.

Click the large M for ‘Memo’ against the part number you require and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.

Proofing / Checking Order / Error Amends



When you have all of the products and one carriage line entered into IntraStats, click ‘Print CVM****** Checking Document’, this will generate a PDF of the order. Check that all information is displayed correctly.

Should there be any errors click the back button on your browser and amend then repeat the step.

Item Reference	Description	Quantity	Unit	Unit Vat	Total
0021013	Posey Sensor Wraps Model 6554 Box of 12	4	11.80	2.36	56.64
PPUPS1	UPS Courier Delivery - Standard	1	0.00	0.00	0.00

If the carriage line is not situated below all the products on the order, return to the order processing screen then click the ‘Drag/Drop’ and move to the correct position.

Once happy that the PDF is all displayed correctly, click the back button and this shall return you to the order processing page.

Submit for Checking

Now the order is ready for checking, click the ‘Submit CVM****** for Checking’ button and this will add the order to the list for checking. Send a Skype message to ‘Viamed Order Checking’ or ‘Viamed Employees’ group stating the CVM number and ask for someone to check. See VM3COP20.32 Order Checking for this process. Once checking has been completed, it will appear on the ‘Active List’ for goods out to process.

Insurance

UK End User Customers (i.e. end user, or hospital) – Price List 0001

Customers are covered for all orders if sending to a customer using price list 0001. The cost of insurance is NOT passed to the customer. Orders up to the value of £2000 should be processed as CIP and any losses will be covered by Viamed. Orders with a value greater than £2000.01 should be processed as CIP and any losses will be covered by UPS.

Price List Code	Value £0 - £60.00	Value £60.01 - £2000.00	Value Greater than £2000.01
0001 UK End User	**CIP** No Insurance line on the order. Goods are covered automatically by UPS up to the value of £60.00	**CIP** No Insurance line on the order. Losses covered by Viamed.	**CIP** No Insurance line on the order. Insurance covered by Viamed but paid directly to UPS. This is added as a declared value to the UPS system by Goods Out.

UK Distributors Customers – Price List 0002

Customers are covered for all orders if sending to a customer using price list 0002. The cost of insurance is NOT passed to the customer. Orders up to the value of £2000 should be processed as CIP and any losses will be covered by Viamed. Orders with a value greater than £2000.01 should be processed as CIP and any losses will be covered by UPS.

Price List Code	Value £0 - £60.00	Value £60.01 - £2000.00	Value Greater than £2000.01
0002 UK Distributor	**CIP** No Insurance line on the order. Goods are covered automatically by UPS up to the value of £60.00	**CIP** No Insurance line on the order. Losses covered by Viamed.	**CIP** No Insurance line on the order. Insurance covered by Viamed but paid directly to UPS. This is added as a declared value to the UPS system by Goods Out.

Large Value Order

If the order totals £10,000 or more, a director’s sign off is required. Locate a director and ask them sign off on the system.

Credit Card Payments

See VM3COP03.02 on how to take card payment using Square.

Order Acknowledgements and Advising of Dispatch Dates for Out of Stock Items

As part of the next section “Sending Order Confirmation” you can advise the customer of an estimated dispatch date, if requested or provide lead time should the items be currently out of stock.

Should an item be out of stock, check if there is an outstanding PO with the supplier. This can be found in “Suppliers Back Order Status”.

Suppliers Back Order Status

Outstanding Orders as of Mar 21 2022

Host	Supplier	P.O.	Date Ordered	Date Required	Order Confirmed	Estimate Ship	Part Number	Supplier Part Number	Description	Quantity Required	Quantity Received	Quantity Outstanding	
	Maxtec Inc	PVM2434	11 Mar 2022	11 Mar 2022	14 Mar 2022	26 Apr 2022	'0310291	"R229P01-024"	MaxBlend 2 (NIST) Low Flow Blender0-15 lpm flow meter	2		2	Add Watch
										2	0	2	

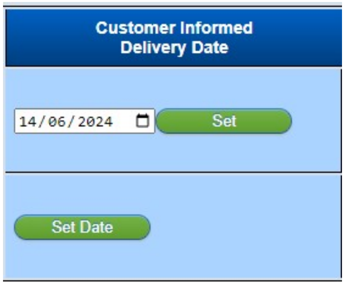
If you click “Add Watch” you will be notified should the delivery date, be amended. Please inform the customer of any estimated delivery date and updates, where necessary.

If there is no stock on order, please raise a warehouse request. Click 

Go to “Request Item from Warehouse” List items requested, also include order number in notes box. Click “Add”.

Using VM3COP20.302 you can provide an estimated dispatch date to the customer.

Add this information against the stock line on the customers order under the “Customer Informed Delivery Date” column, click “Set Date” button, insert the necessary date and click set.



N.B. If you provide an 8-10 weeks lead-time, provide the latest date.

Sending Order Confirmation

Periodically through the day all office staff members need to review the “Outstanding Customer Orders page” for the “Send Order Confirmation” button. Review your own order but also review any orders which have not been completed in case that staff member has left for the day.

Click the green “Send Order Confirmation button”, this will generate a Gmail Link.
Click the link and it will open your Gmail.
Review the email that all contents are correct.
Attach a copy of the order confirmation which can be downloaded as below.

Gmail Link Conf. Sent	Viamed Aqib Majeed	3	CVM149506	Order	22 Apr 2024	07 Jun 2024	Vandagraph Sensor Tec VST	Steve Nixon	CID5914	Ref :PST3746	Details	No	

Once sent, click the “Conf.Sent” button and this will be tagged against the order.

Editing an Order

If an order needs editing, for example, if the priority needs to be changed, click the ‘Opera Data’ icon in IntraStats and click ‘Outstanding Customer Orders’. This will take you to a full list of orders being processed through the system.

Locate the order you want to edit and click the ‘Details’ button, this will open the order processing page as before.

To be able to edit, click the ‘Order has Error – open for editing’ button. Enter the reasoning for editing the order and click ‘Confirm Open Order for Editing’. This opens the page so it is now editable then make amends as required. Should you wish to remove a line from the order, you must amend the quantity to 0 and refresh the page.

If the date on an order is changed, please check that the product lines have also updated. For example, if an order is put on as a forward date and then you edit the date after, make sure you click the ‘Update Including Details’ button next to the Due Date.

Once an order has been edited, it must be rechecked – following the steps in section ‘Submit for Checking’ section (page 11).

VAT Exemption

If an order is VAT exempt, you will need to ensure you have acquired a VAT exemption certificate from the customer before proceeding. A new VAT exemption certificate is needed for each order. Process the order on IntraStats but ensure the priority is stated as ‘8’ until the certificate is received. Once received, if you are unsure of its validity pass to the accounts department and ask them to sign it off.

Once validated and signed off, upload the VAT certificate to the ‘VAT Exempt Certificate’ section at the top of the order processing screen. Once uploaded it will state ‘Yes’ next to the title.

Ensure the VAT is removed from product and carriage lines. To do this, click the box in the ‘VAT E’ column against the relevant line.

Free of Charge Carriage

If the order contains products that have both free and chargeable carriage, the carriage is free unless the additional chargeable items require additional boxes. Please ask Goods Out if you are unsure.

Priority 1

If the purchase order states that the order is urgent, ensure stock is available and call the customer to ask which date they need the order for. If they need it the next day or you are unable to contact them, set the priority as ‘1’. Ask a director to sign off on the system. Add memo to the order stating: ‘When order picked inform:’ *Your name*.

Once checked, inform Goods Out that there is a priority 1 order on the system.

Discounts

If an order has a discount applied or has any free of charge items/carriage (lines which would normally be chargeable), ask a director to add note to the order notes before proceeding to the checking stage.

PayPal

On occasion, a customer may wish to pay via PayPal. Should this occur, add a line above the carriage line. Use reference 'PAYPAL', and calculate 6% of the total cost of the order including VAT (excluding this PayPal charge). Add this calculated charge to the 'Unit Price' box.

E.g. Products totalling £650 with a £10 carriage charge would equal £792 including VAT. The PayPal charge would be 6% of the total including VAT therefore the PayPal charge in this example is £47.52.

If the carriage line is not situated below all the products on the order, return to the order processing screen then click the 'Drag/Drop' and move to the correct position.

If no PO number is provided click the 'Non given' button next to customer reference and the system will automatically generate one for you. Please be aware that if you do this more than once a day you will need to add a number to the end so that the reference is not duplicated.

Western Union Payments *(Check with accounts before offering to customers)*

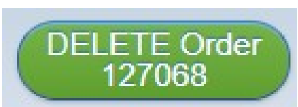
On occasion, a customer may wish to pay via Western Union. Should this occur, add a line above the carriage line. Use reference 'Bank Charges', amend the description to 'Western Union Charge'. The charge is £15, add this to the 'Unit Price' box.

Note: The customer will need the full name, including any middle names, of the person who collects the payment; this would normally be Helen. Helen's full name is Helen Jean Lamb, please ensure the customer uses this when making their payment.

Converting Proforma/Quotation to Order

Once payment has been received or quotation accepted with a purchase order being received, find the order on the 'Customer Sales Orders' page and click the details button. This will open the order processing page. Scroll down the page until you see the green buttons and click 'Convert to Order'. Check all information is correct and re-submit the order for checking.

Deleting Orders



Should a quotation/proforma/order need to be deleted, please be aware these are retrievable but would need the date amending and the prices/stock checking again. At the top of the customer order page click the 'DELETE Order *****' button. Please enter the relevant reason for deletion and click 'Delete *******'. Once deleted you will need to start a new sales order.

Proof of Export

Proof of export can be added at any stage:

- Goods Out can upload shipping document
  i.e. airway bills or proofs of collection
- From the customer or shipping company.

The CVM can have documents added even after it has been invoiced.
Customers who want EXW with companies we do not deal with often will need to send proof of export.

- UPS: We do not require this as we have an account from them.
- TNT / FEDEX: We have an airway bill and proof the driver has picked up.

Additional Notes

If a PO has two or more lines of the same part number, the system will automatically group them together per sales value, for example an order for 2 x R-17MED plus 3 x R-17MED (chargeable) plus 1 x R-17MED (free of charge) will show on the invoice as 5 x R-17MED (chargeable) and 1 x R-17MED (free of charge).

For orders that are solely for calendars or posters, add notes to order processing page stating to ship with next order unless agreed by director.