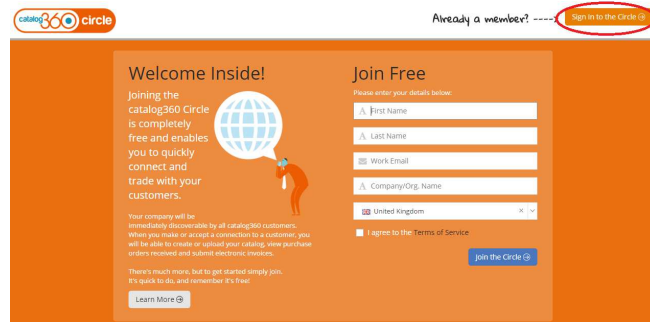


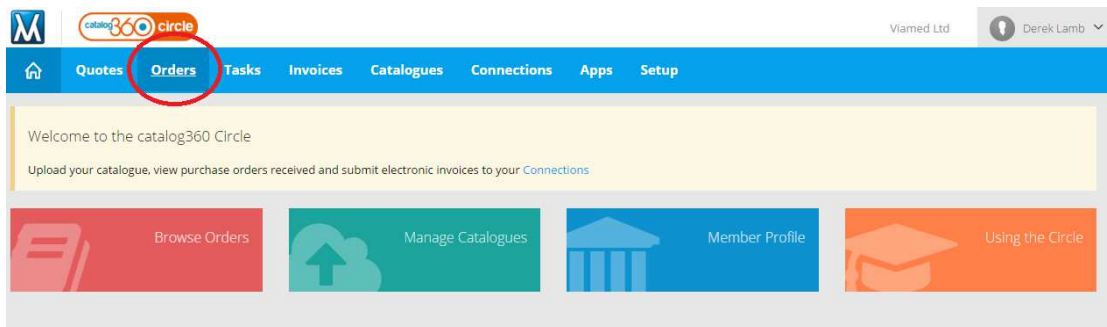
Catalog360 Circle Order Processing

Navigate to <https://circle.catalog360.com> and click “Sign In to the Circle”

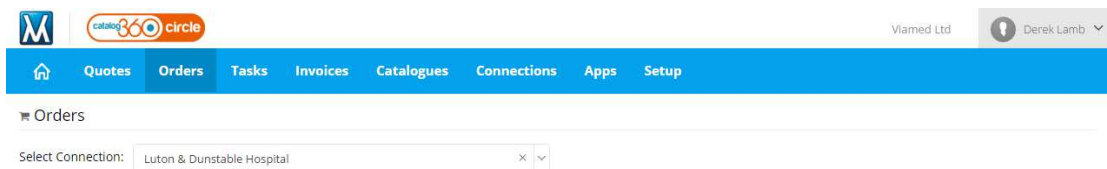


The username is: `orders@viamed.co.uk` and the current password can be found in GoldMine notes

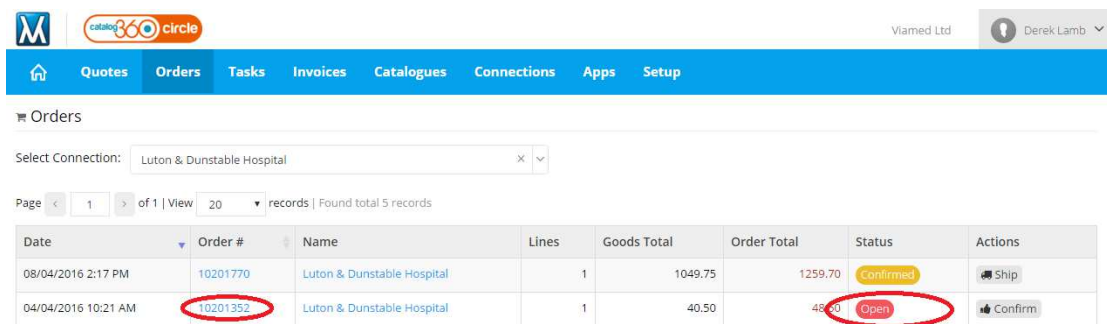
Click on “Orders”



Select the hospital name – currently only Luton & Dunstable use this system



You will be presented with a list of orders, in the “Status” column, find the order which has a red “Open” stamp and click the corresponding “Order #”



This will display the purchase order; ensure all pricing, including shipping is correct. If there are any inaccuracies, contact the person named on the Opera account memo, do not process until amended on the Catalog360 Circlesystem. Click on 'Download Order (PDF)' and print the page that opens.

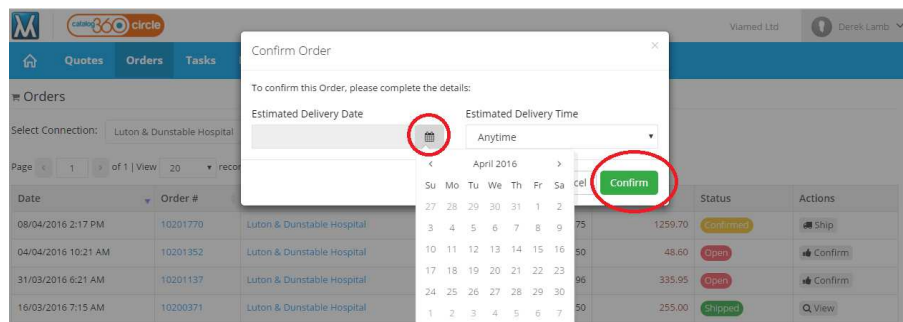
Click the print icon and print the page

In Opera, process the order as per the order processing procedure VM3COP20.30 (Doc ID: 17138) **Make a note on both copies of the ORD to "inform *your name* when invoiced"**. This will send you an issue to inform you that the order has been invoiced and is ready to ship so you can proceed to the Shipping and Invoicing stage as per the Catalog360 Circle Shipping and Invoicing procedure on page 9.

When the order is on the system and you know the expected shipment date (if the item is out of stock, check the PO log or ask stock control, if it is an SRS repair, check with Repair Admin staff for shipment date) click on "Confirm"

Date	Order #	Name	Lines	Goods Total	Order Total	Status	Actions
08/04/2016 2:17 PM	10201770	Luton & Dunstable Hospital	1	1049.75	1259.70	Confirmed	Ship
04/04/2016 10:21 AM	10201352	Luton & Dunstable Hospital	1	40.50	48.60	Open	Confirm
31/03/2016 6:21 AM	10201137	Luton & Dunstable Hospital	2	279.96	335.95	Open	Confirm

You will be asked to provide a delivery date. Click on the calendar symbol and choose TWO WORKING days AFTER the expected shipping date. Click the green “Confirm” button.



When an issue is received to say the order has been picked, proceed to ‘Ship’ and ‘Invoice’ the order as per Catalog 360 Shipping and Invoicing procedure on page 9.

In case you do not receive an automatic issue, also make a note in your diary for the day of the expected shipping date to remind you to “Ship” and “Invoice” the order as per Catalog 360 Shipping and Invoicing procedure on page 9.

Catalog 360 Circle Checking Procedure

Collect the order from 'Tray 4 – Sales Orders – Checking' in the office; there should be a minimum of a purchase order (PO) and 2 copies of the ORD plus any communication as applicable.

ORD

Invoice Address
Medicoline ApS
Vaerkstedsvej 24 B
Koege
Denmark
VAT No: DK33046960
DK-4600

00006353

Locate the account number on the ORD and locate the account on Opera.

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11
Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

Find
Previous
Next
Add
Edit
Memo
Delete
Proforma
Order
Delivery
Invoice
Credit
Quit

Account 00006353 Currency EUR
Customer Medicoline ApS *** See Memo ***
Address Vaerkstedsvej 24 B
Koege
Denmark
VAT No: DK33046960
Postcode 24-4600
Telephone
Facsimile
Accts Contact
Order Contact
Ledger A/c 00006353 Medicoline ApS
Invoice A/c

Options Items Analysis Delivery OK

Click on 'Memo', read the memos and ensure that the ORD meets any noted requirements.

Take 1 copy of the ORD and the PO. Compare the invoice address on the ORD to the PO, tick each line on one copy of the ORD to confirm it is correct. Repeat this for the delivery address.

Check the order number on the PO against the 'Cust Ref' on the ORD and tick the ORD if correct.

Check each line against the PO, check part number, description, quantity and price are correct & tick if so.

Check the carriage line for the correct courier as per the items listed, referring to the Customer Postage Pricing COP (Doc ID: 16501) and Intrastats/Opera stock page as necessary. Ensure the correct delivery option has been determined, i.e. Royal Mail/UPS. If details for reference cannot be found, consult with colleagues or confirm courier/pricing with Goods Out then tick the ORD if correct.

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11
Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

System Stock S.O.P. P.Orders
Processing

To check an Opera memo, from the menu page in Opera, click 'Stock' and click 'Processing'.

OPERA for Windows

File Edit

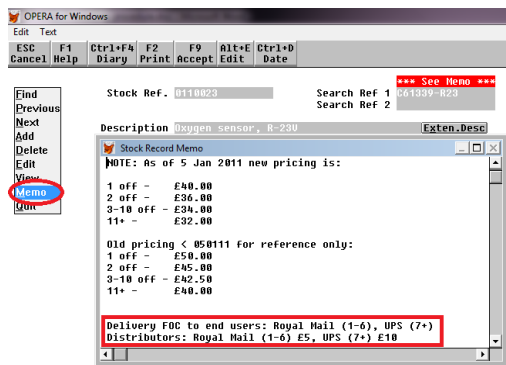
ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11
Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

Find
Previous
Next
Add
Delete
Edit
View
Memo
Quit

Find Stock
Stock Code or Part(s) of Description: 0110023

Sales Code TED Teledyne Analysis VAT
Supply Code 2002 Purchases for Resale Override Fixed
Category 011 F102 Product Type TED
Profile 0001 Standard Stock Item Packed 0 per 1

Click 'Find' and type the part number you require further information on, press the 'Enter' key.



Click 'Memo' and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.

Ensure the priority is correct as per the courier and service used as per the Order Processing Priorities COP (Doc ID: 16350) and tick the ORD if correct.

When the priority is correct, check the date due against current cut-off times as found on Order Processing Priorities COP (Doc ID: 16350).

Orders must be scanned in and ORD's taken to Goods Out before cut-off times for the order to be shipped the same day, if the time is later than the cut-off time, the due date would need to be changed to the next working day.

Priority 1 – check with Goods Out for possible ship date

Priority 2 – cut-off time: 11:00am

Priority 3 – cut-off time: 13:00pm

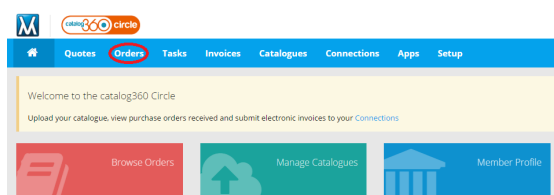
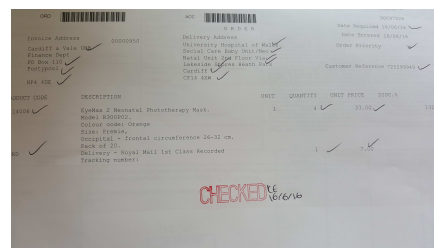
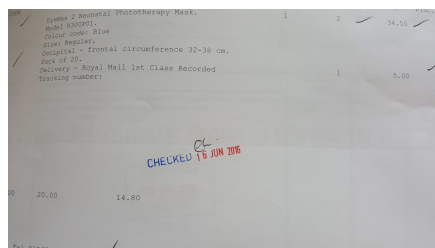
Priority 4 – cut-off time: 15:30pm

Tick the date due on the ORD if correct.

If any details are incorrect, circle them as you work through it. After checking the entire ORD, return all of the paperwork to the person who added the order to enable them to amend any necessary details.

When you are satisfied that the ORD is correct, set the unticked copy of the ORD to one side and staple the remainder of the paperwork (ticked ORD, PO and any communication) in the top-left corner close to the ORD barcode.

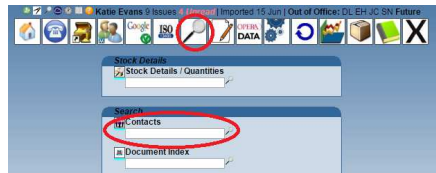
Stamp the stapled copy with 'checked' initial and date next to the stamp.



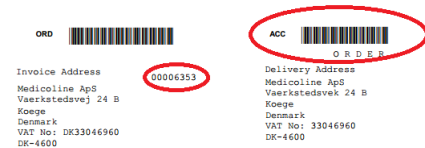
Log into Catalog360 Circle as described on page 1 and click on 'Orders'

Date	Order #	Name	Lines	Goods Total	Order Total	Status	Act
25/05/2016 8:26 AM	10200368	Luton & Dunstable Hospital	1	£53.13	£68.70	New	
17/05/2016 11:19 AM	10204148	Luton & Dunstable Hospital	1	£720.00	£874.00	Confirmed	

Search for the order with the same purchase order number as the 'Cust Ref' on the ORD and ensure the order states 'Confirmed'. If the order states 'New', return the paperwork to the person who added the order and ask for it to be corrected.

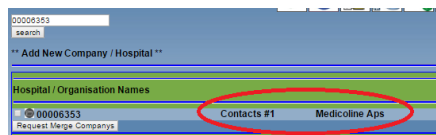


Using Intrastats, navigate to the magnifying glass and click on the 'Contacts' field.



Using your barcode scanner, scan the 'ACC' barcode located at the top-centre of the ORD. This will enter the account number and proceed automatically to the next screen. If you do not have access to a barcode

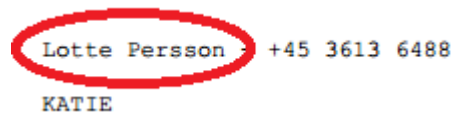
scanner, type the account number (e.g. 00006353) into this box and hit enter.



Click on the company name.



Select the contact name as seen on the ORD. If name not there, refer to VM3COP20.081 (Doc ID14215) on how to add contacts into contact management.



N.B. If the contact does not have an email address linked, check the paperwork thoroughly for an email address.

Contact	Department	Position	Direct Phone	Email
Andrew Barnes	Medical Physics Department	Medical Physics Technician	0141 211 6827	
Billy Campell			0147 550 4560	
Christina Coulter				
Colin Cowan	Medical Physics Department	Practitioner Clinical Technologist		colin.cowan@ggc.scot.nhs.uk
David Ness	Medical Physics Department		0147 550 4560	Geraldine.McIntee@ggc.scot.nhs.uk
Geraldine McIntee			0147 550 4560	paul.mcdonald@irh.scot.nhs.uk
Paul McDonald	Medical Engineering	Technician		

If an email address can be located, after selecting the contact name, click on 'Edit' under the 'Contact Options'



Enter the email address into the 'Primary Email' field and click 'Submit'. This is to ensure delivery notifications can be sent.

The screenshot shows a user profile form. The 'Primary Email' field is highlighted with a red rectangle. Below the form, there is a list of services and a 'Submit' button, which is also highlighted with a red circle.

Click on the 'Order Checking' icon

The screenshot shows a software interface with a top bar containing 'CID 8672', 'Medicoline ApS', 'Lotte Persson', and 'ID 17228'. Below the top bar, there is a row of icons. The 'Order Checking' icon, which is a magnifying glass over a document, is highlighted with a red circle.

Working your way down the screen, input each section, starting at 'Order number' using your barcode scanner, scan the 'ORD' barcode, this will enter the ORD number located at the top-right of the ORD paperwork. If no barcode scanner is available, type the ORD number eg. "ORD80574"

The screenshot shows an order form. The 'ORD' barcode is highlighted with a red circle. The 'Order No.' field is also highlighted with a red circle and contains the value 'ORD80574'. Other fields include 'Invoice Address', 'Delivery Address', 'Date Required', 'Date Entered', 'Order Priority', 'Customer Reference', and 'This Order Is Priced In Euros'.

The 'Entered into Opera by' box needs to contain the name of the person listed at the bottom-left of the ORD in capital letters.

Lotte Persson - +45 3613 6488

KATIE

'Priority on order' needs to match the priority as seen on the ORD

Order No. ORD80574

DOC96905

Date Required 01/06/16

Date Entered 01/06/16

Order Priority 3

Customer Reference 01/06/2016

Click the appropriate button for method of PO receipt as per the original PO from the customer.

Any hand-written notes on the ORD must be typed here.

'When order picked inform:' always add the name here of the person who added the order to the system as this will generate an issue for them to 'Ship' the order.

Order Checking:

Order number	ORD0074
O Account Number	0000593
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Out off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Visible to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	<input checked="" type="checkbox"/>
When order picked inform	Kate Evans
Can be shipped early if ready	<input checked="" type="checkbox"/> (Customer happy to receive order before Due date)
Hold Packing - Amending order	
Add Mailing?	
Confirm	Confirm

If it is a forward order and there is a note to say the order can be shipped early, tick the 'can be shipped early if ready' box.

This box can also be ticked if cut-off time has been missed as long as the customer has not requested delivery on a specific date.

E.g. If you are checking a priority 3 order which has the next working day's date and the time is 2PM, this box can be ticked as UPS do not arrive until 3PM.

If the due date is the next working day:

Priority 2 can be ticked between 11am and 12pm

Priority 3 can be ticked between 1pm and 3pm

Priority 4 can be ticked between 3:30pm and 4pm

Order Checking:

Order number	ORD0074
O Account Number	0000593
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Out off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Visible to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	<input checked="" type="checkbox"/>
When order picked inform	Kate Evans
Can be shipped early if ready	<input checked="" type="checkbox"/> (Customer happy to receive order before Due date)
Hold Packing AMENDING order	<input checked="" type="checkbox"/>
Add Mailing?	
Confirm	Confirm

If the customer changes any part of the order, or should the order need amending for any reason, tick the 'Hold packing AMENDING order' button to prevent the order being invoiced or shipped. Ensure you inform Goods Out of this and reprint the ORD once

amended, hand-write a note at the top of both copies of the ORD stating *amended* and place in the checking tray to be re-checking.

Order Checking:

Order number	ORD0074
O Account Number	0000593
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Out off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Visible to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	<input checked="" type="checkbox"/>
When order picked inform	Kate Evans
Can be shipped early if ready	<input checked="" type="checkbox"/> (Customer happy to receive order before Due date)
Hold Packing AMENDING order	<input checked="" type="checkbox"/>
Add Mailing?	
Confirm	Confirm

When all details are correct, click 'confirm'.

Catalog 360 Circle Shipping and Invoicing Procedure

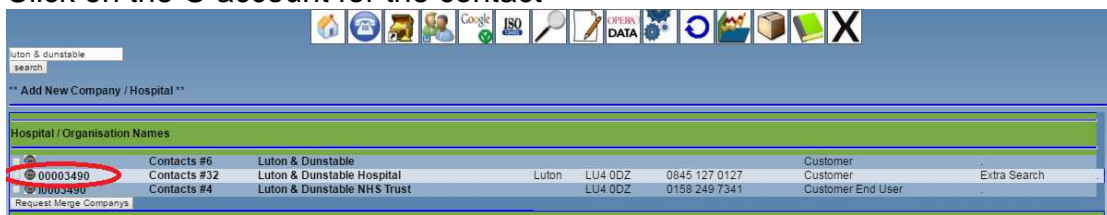
When you are informed that the order has been invoiced, go to the GoldMine tab on Intrastats and Click “Contact Management”



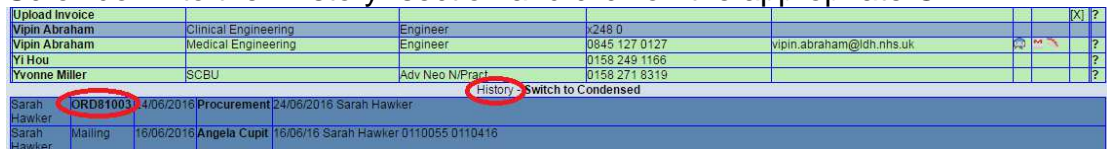
Type the name of the contact and click “search”



Click on the O account for the contact



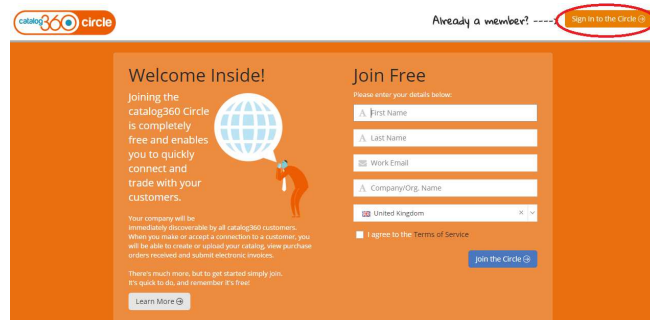
Scroll down to the “History” section and click on the appropriate ORD



This will display a tracking number for the order

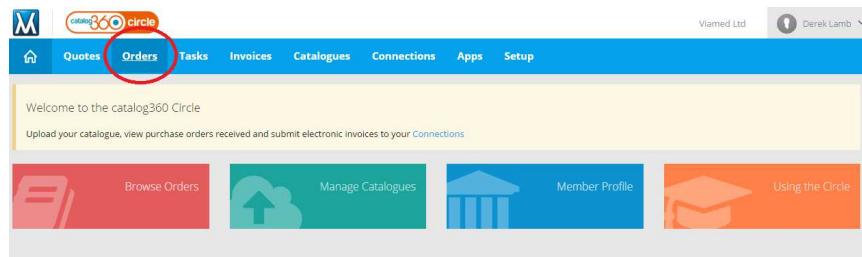


Navigate to <https://circle.catalog360.com> and click “Sign In to the Circle”

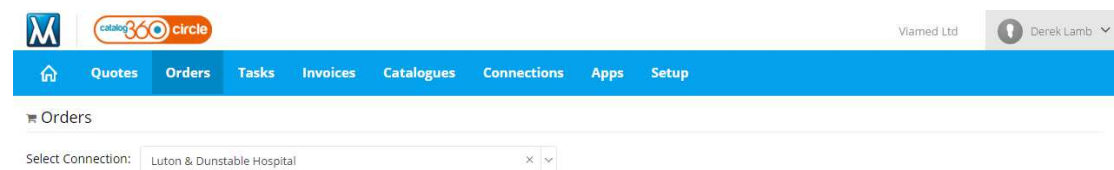


The username is: orders@viamed.co.uk and the current password can be found in GoldMine notes

Click on “Orders”



Select the hospital name



From the list of orders, find the corresponding purchase order and click “Ship” in the “Actions” column

Date	Order #	Name	Lines	Goods Total	Order Total	Status	Actions
08/04/2016 2:17 PM	10201770	Luton & Dunstable Hospital	1	1049.75	1259.70	Confirmed	Ship
04/04/2016 10:21 AM	10201352	Luton & Dunstable Hospital	1	40.50	48.60	Confirmed	Ship
31/03/2016 6:21 AM	10201137	Luton & Dunstable Hospital	2	279.96	335.95	Open	Confirm
16/03/2016 7:15 AM	10200371	Luton & Dunstable Hospital	2	212.50	255.00	Shipped	View
11/03/2016 4:51 PM	10200186	Luton & Dunstable Hospital	1	480.00	576.00	Part Shipped	Ship

Fill in the “Carrier” and “Tracking Reference” details making sure these are correct and click “Create Shipment”

Order: 10201352

Shipment for Purchase Order 10201352

Summary

Purchase Order Raised: Apr 4 2016 10:21 AM

Ship To

Medical Equip. Technician
Goods Yard (Main Stores)
Luton & Dunstable Hospitals NHS Foundation Trust
Lewsey Road
Luton
Bedfordshire
LU4 0DZ
marie.samsuddin@ltdh.nhs.uk

Line	Code	Description	Ordered	Shipped	Shipping Now	Back Order
1	QU004140	QUOTATION NO: QU004140 - LABOUR - VM-2500 CAPNOGRAPH OXIMETER - SR505327 - SRN26948 - S/N 80640161 - INCLUDING POWER CONNECTOR SR5 05327 - SRN26948 - AND DELIVERY CHARGE - WR NO: 51906 - ASSET NO: 25307 - FOR ITU - COST CODE D90	1	0	1	0

Shipment Details

Shipment Reference: 10201352-10201352-10201352

Carrier: UPS

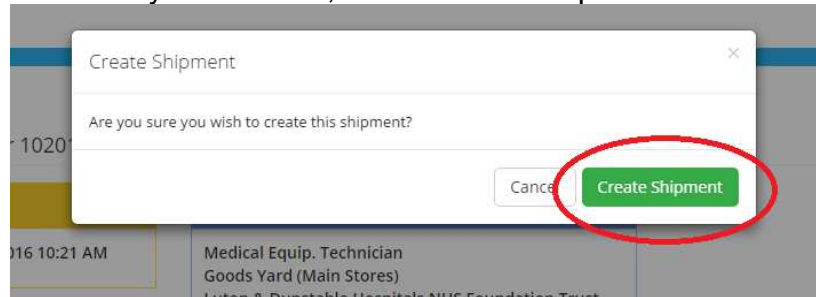
Tracking Reference: 1Z9W9638DK68524787

Comments

Cancel

Create Shipment

You will be asked if you are sure, click “Create Shipment”



The system will then take you to the open order, scroll to the bottom and click “Invoice Shipment”

Medical Equip. Technician
Goods Yard (Main Stores)
Luton & Dunstable Hospitals NHS Foundation Trust
Lewsey Road
Luton
Bedfordshire
LU4 0DZ
marie.samsoodin@ldh.nhs.uk

Accounts Payable
Finance Department
Luton & Dunstable Hospitals NHS Foundation Trust
Lewsey Road
Luton
Bedfordshire
LU4 0DZ
marie.samsoodin@ldh.nhs.uk

Line	Code	Description	Quantity	Unit	Unit Price	Goods Total	Tax/VAT	Line Total
1	QU004140	QUOTATION NO: QU004140 - LABOUR - VM-2500 CAPNOGRAPH OXIMETER - SR565327 - SRN26948 - S/N 80640161 - INCLUDING POWER CONNECTOR SR5 65327 - SRN26948 - AND DELIVERY CHARGE - WR NO: 51906 - ASSET NO: 25307 - FOR ITU - COST CODE D60	1	Each (1)	£ 40.50	£ 40.50	£ 8.10	£ 48.60

Goods Total: £ 40.50
Delivery: £ 0.00
VAT / Tax: £ 8.10
Order Total: £ 48.60

Date	Shipment Ref	Carrier Name	Tracking Ref	Goods Amount	Status	Invoice	Actions
13/04/2016 8:51 AM	10201352/20160413084613	UPS	1Z9W9638DK68524787	£ 40.50	Shipped	Invoice Shipment	View Shipment

You will be presented with the “New Invoice” screen.

Viamed Ltd | Derek Lamb

Navigation: Quotes | Orders | Tasks | **Invoices** | Catalogues | Connections | Apps | Setup

< Invoices

New Invoice

Department / Contact

ronan agno

Bill To

Accounts Payable (Deb)
 Finance Department
 Luton & Dunstable Hospitals NHS Foundation Trust
 Lewsey Road
 Luton
 Bedfordshire
 LU4 0DZ

Invoice Number:

Invoice Date: 27-06-2016

Payment Due Date: 27-07-2016

Message:

Attach

	Code	Description	Quantity	Unit	Pack Size	Unit Price	Goods	VAT / Tax %	VAT / Tax	Total
1	44205	Adult/Paediatric Slides	1	Box	1	53.13	53.13	20%	10.63	63.76
+ Add Line										
	Shipping					5.00		20%	1.00	6.00

Goods Total: 53.13

Shipping: 5.00

VAT / Tax: 11.63

Invoice Total GBP: 69.76

Submit Invoice

From Opera, find the invoice date and invoice number

OPERA for Windows

File Edit

ESC Cancel F1 Help F2 Print F4 Delete/Undelete F5 New F6 Edit F9 Invoice F11 View F12 Memo TAB More----

Find Previous Next

Account 00003496 *** See Memo ***

Customer Luton & Dunstable Hospital

Memo	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
	D0C95028	23/02/16	Invoice	IN143120	24/02/16	10123848	Printed
	D0C95187	02/03/16	Invoice	IN143275	03/03/16	10124475	Printed
	D0C95405	11/03/16	Invoice	IN143552	21/03/16	10200186	Printed
	D0C95454	15/03/16	Invoice	IN143978	13/04/16	10201352	Printed
	D0C95476	16/03/16	Invoice	IN143420	16/03/16	10200371	Printed
	D0C95737	31/03/16	Ord	ORD79523	31/03/16	10201137	Edited
	D0C95907	08/04/16	Ord	ORD79679	08/04/16	10201770	Edited

Enter these into the specified fields and ensure the pricing is identical to that stated on the ORD/Opera.

Opera CRM - New Invoice

Invoice Number: Invoice Date: 27-06-2016
 Payment Due Date: 27-07-2016

Message:

Attach

Code	Description	Quantity	Unit	Pack Size	Unit Price	Goods	VAT / Tax %	VAT / Tax	Total
1	ADJ/Paediatric Size	1	Box	1	53.13	53.13	20%	10.63	63.76
Shipping					5.00		20%	1.00	6.00

Goods Total: 53.13
 Shipping: 5.00
 VAT / Tax: 11.63
 Invoice Total GBP: 69.76

Submit Invoice

Click the 'Attach' button, navigate to U drive>Operadocs and search for the invoice number. When located, click 'Open'. If the invoice cannot be located, follow the steps on VM3COP20.062 PDFing Of Invoices (Doc ID: 17100) and try again.

If everything is correct, click "Submit Invoice"

If the pricing is incorrect, read any communication that has been sent and received with the named contact, the pricing should have been amended if it was noticed during processing. If anything is still incorrect, read the memo on Opera for the applicable account and contact the Catalog360 Circle representative for the company/hospital named there and ask that the Catalogue360 Circle system is amended before submitting the invoice. When they have made the necessary amendments, submit the invoice.