UK Order Processing Procedure - Viamed

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 (Doc ID: 16436) for Cardea, and VM3COP27.30 (Doc ID: 17062) for Catalog360 Circle.

Telephone Orders

A telephone order will appear as shown to the left. The delivery and invoices addresses are noted, as are the contact name, order number and product details. If you have taken the order yourself, this needs to be printed 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. 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 GoldMine/contact management.

Uploaded Orders

There are no notifications to advise you when an order has been uploaded via the website, so this must be checked daily. From the magnifying glass tab in Intrastats, click 'Uploaded Files'

You will be presented with this screen, completed orders will have a name in the 'Completed By' column, unprocessed orders need to be downloaded.

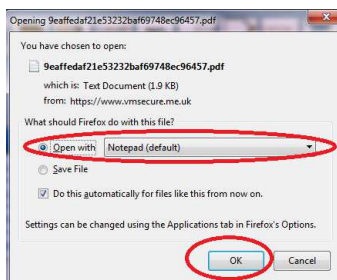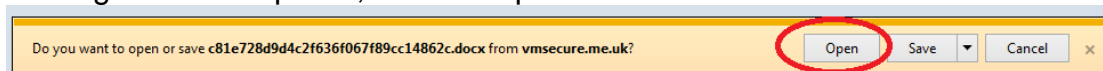Click 'Download' on the unprocessed order line and the file will be downloaded to your computer. Click the newly downloaded file to open it (Google Chrome)

If using Internet Explorer, click on Open

If using Firefox, select the program you wish to open the document with and click open
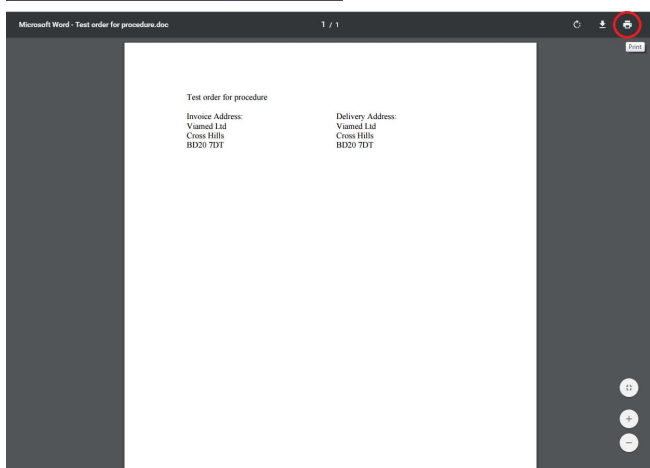
Click the print button and proceed to print 1 copy

Click the 'Click as Processed' button and continue as below.

Email Orders

When an order is received in the main inbox, click on it to open it.
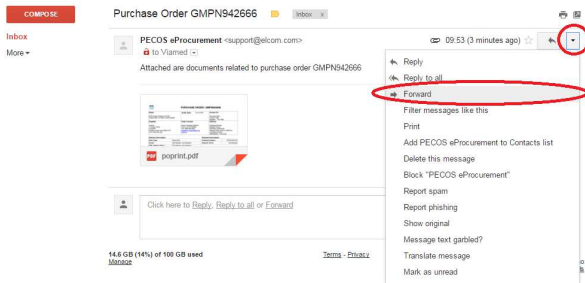
Click the arrow on the right and click forward.
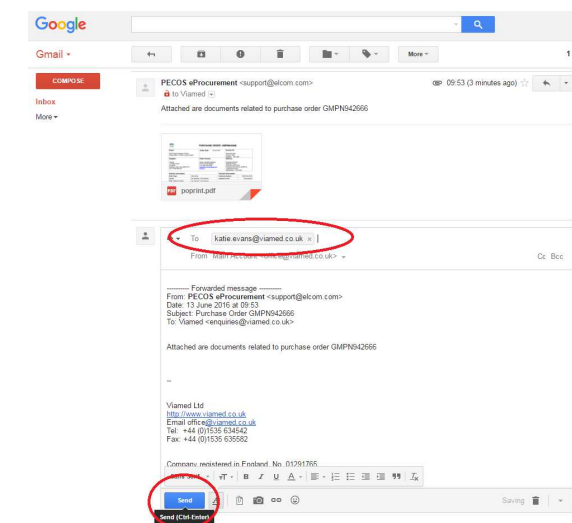
Type your email address in to the 'To:' field and click send.

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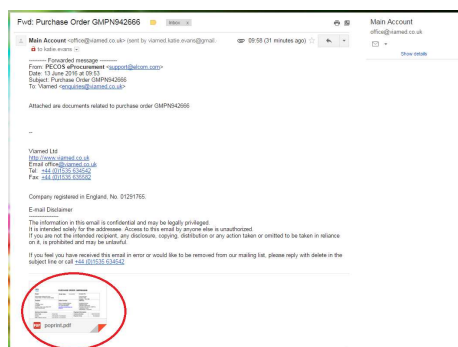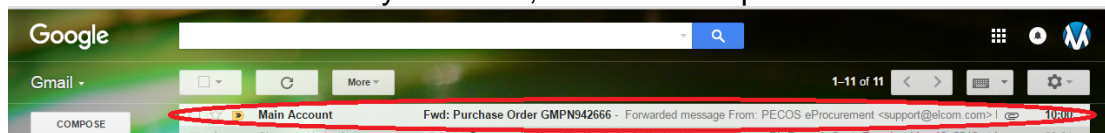
Click on the attachment to open it.

Click the print button at the top of the page and print to the printer located on your desk. Current printers in the main office are named HP LaserJet Professional P1102.
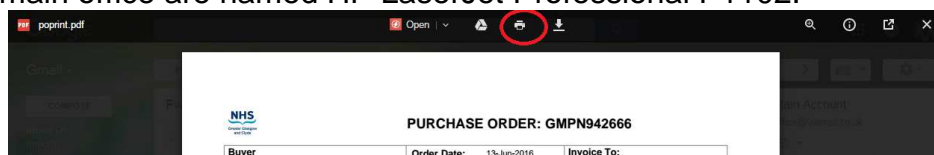
Order Processing

From the magnifying glass tab on Intrastats, click into the 'Contacts' field and enter the company/hospital name or the Opera account number.
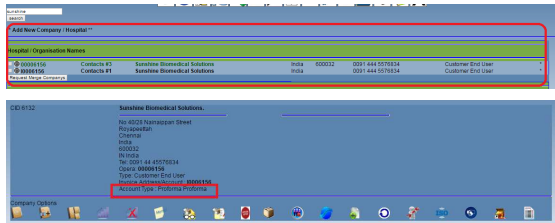
Click on the account number beginning in 0

Find the 'Account type', if this says 'Proforma', please stop here and follow VM3COP27.31 (Doc ID: 17063) If this says 'Credit', please proceed
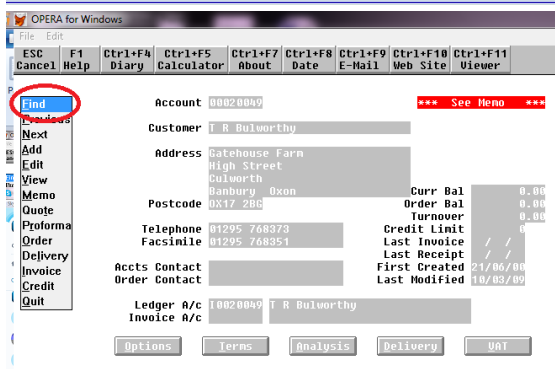
From Viamed Opera, click 'SOP' and then 'Processing'. Click 'Find' or press the F key.
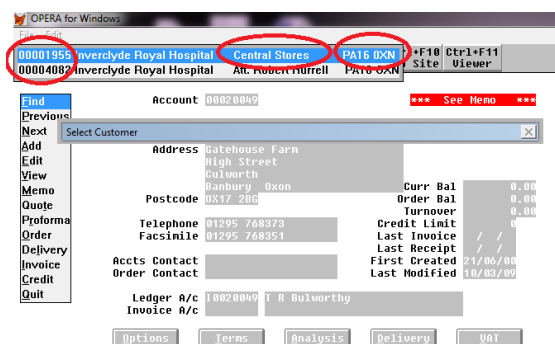
Locate the delivery address for the company/hospital on the printed PDF email attachment and enter it into the search bar in Opera. Some hospitals have several accounts, in this case, check the department and postcode and click on the correct one ensuring it is an account beginning with '0' e.g. 000*****. You must NOT place an order on an account beginning in 'I' as this is for invoicing.

| Supplier	Order Contact	Delivery
Viamed 15 Station Road Crosshills Keighley, West Yorks BD20 7DT Fax: 01535 635 582	Name: Geraldine McIntee Phone: 01475 504560 Fax: 0000 000 0000 geraldine.mcintee@ggc.sco t.nhs.uk	Geraldine McIntee Medical Physics CENTRAL SUPPLIES INVERCLYDE ROYAL HOSPITAL LARKFIELD ROAD GREENOCK, PA16 0XN
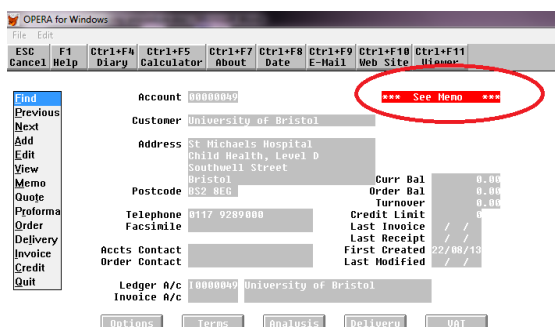
If there is a memo present, check this thoroughly first, ensuring you adhere to the requirements. If you are unsure of any of the memos, consult with office colleagues or the person who added the memo

Click on 'Invoice'

Check the 'Cust Ref.' Column and check the last 6 months to ensure the purchase order number which is listed on the printed purchase order, has not already been entered.

If there are many accounts with the same company/hospital name, check for duplicated orders on Intrastats. From the magnifying glass, click the 'Invoice / Customer Reference' link

Enter the PO number into the 'Customer Reference' field and click search. If the PO has already been entered, a result will be found, do not proceed to process the order. Instead, locate the order which is already on the system and compare the lines to ensure it is the same order.

From the same 'Invoice' screen, click on any of the orders and press F11, then click on 'Header' in order to view the invoice address. If this address is correct, proceed. If the address is incorrect, check to see if there is another account for the same company/hospital with a different invoice address. If the correct account still cannot be found, check with the accounts department or call hospital to see if the invoice address has been changed permanently.

Press the Esc key to exit the invoice view and click 'Order'; this will display any outstanding orders, quotes and proformas.
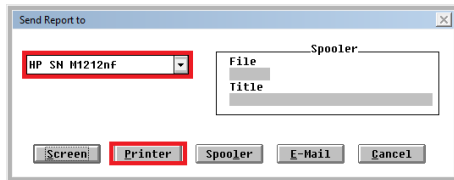
Click the 'F5 New' button or hit F5 on the keyboard. You may be presented with the printer dialogue box. From the drop-down menu, select the printer named in the image, 'HP SN M1212nf' and click 'Printer'.

You will be presented with this dialog box
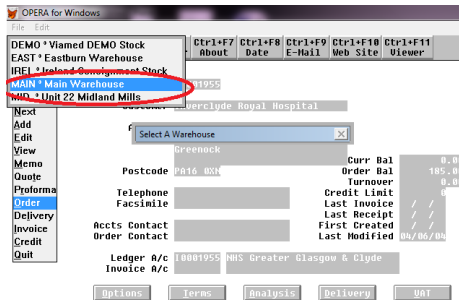
Click 'OK' or hit enter to proceed.
You will be presented with warehouse options, always choose 'MAIN * Main Warehouse'
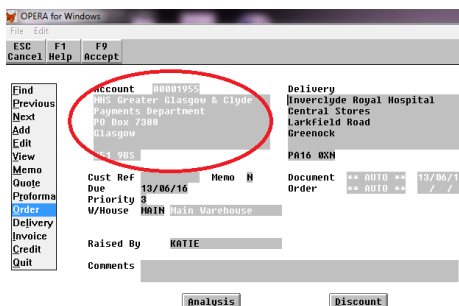
Here is where we enter the address details from the purchase order. To start, check the invoice address in the left-hand box matches the invoice address listed on the received purchase order
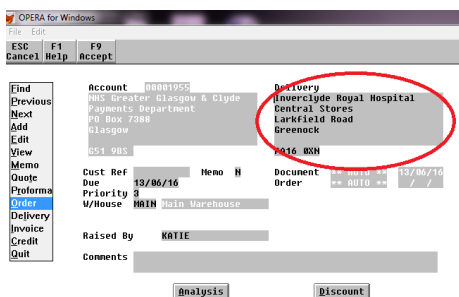
The delivery address in the right-hand box may display an incorrect department; if so, amend it to match the purchase order.
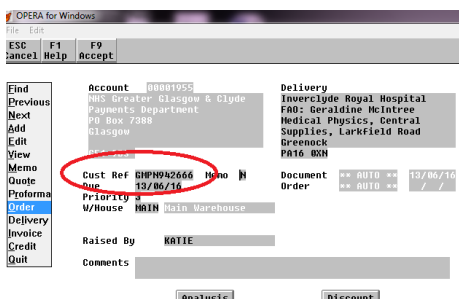
In the 'Cust Ref' box, enter the purchase order number from the purchase order.

If the purchase order number has more than 10 characters, the 'Cust Ref' box must contain '#xxxxxxxxx' using the last 9 digits of the purchase order number.

This does not apply to eBay and Amazon orders, follow the steps on VM3COP20.16 (Doc ID: 15530) for eBay and VM3COP20.23 (Doc ID: 16191) for Amazon.

From the products ordered, establish which courier is suitable. 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 (Doc ID: 16501)

This document also advises if the appropriate courier is UPS or Royal Mail for the most popular products; alternatively, check the Opera 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 states urgent)
Priority 2 – Courier other than UPS or Royal Mail
Priority 3 – UPS – all services
Priority 4 – Royal Mail – all services

In the 'Comments' box, enter the name and telephone number (including any extension) of the contact listed on the purchase order. If a contact name or phone number is not listed, check the CRM on Intrastats or GoldMine for the details, if necessary, name the contact 'Purchasing' and use the hospital/company main telephone number.

When you are confident that all of these details are correct, press 'F9' to continue to the next page. If the purchase order number had more than 10 characters, beneath the name and telephone number in the 'Comments' field, state the full purchase order number beginning with '#', eg. '#xxxxxxxxxxxxx'.

If no purchase order number has been provided, enter the date in the 'Cust Ref' box. Eg. '16/06/16' If the customer is paying via PayPal or credit/debit card, use PP followed by the date. Eg, 'PP16/06/16' if payment is made via PayPal or 'CC16/06/16' for credit or debit card. If paying by credit/debit card, add a note beneath the name/phone number stating 'Payment received with thanks'.

On Intrastats, click on the magnifying glass and enter the company/hospital name into the 'Contacts' box

Locate the correct account and look at the far right of the screen to see if they are an end user or a distributor. If this is not set, check the Opera account.

To check the Opera account, locate account as above. Click 'Edit' and then click 'Terms'

In white text, next to the 'Profile Code' you will find the type of customer.

Press 'Cancel' then 'Esc' to continue.

Return to the magnifying glass and search for the part number in the 'Stock Details / Quantities' box and hit enter.

Click on the '£' button to display all of the prices. Locate the price for the correct currency and customer type (end user/distributor)
If the prices match the purchase order, proceed to Opera to enter the details.

While on this page, check if the item requires a carriage charge for sending by clicking the 'i' button. This product does not include free carriage.

If an item does have free carriage (only applicable to UK end users and distributors), the following notice will be displayed:

For distributor and automotive carriage charges, see VM3COP20.34 (Doc ID: 17145)

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 first screen and change the priority to '8', contact the customer before proceeding. Contact the customer by telephone if possible but email if they are unavailable. Make a note on the paper copy of the purchase order 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.
If these queries cannot be answered by telephone immediately and you have had to set the priority to 8, fill in as many of the order details as possible, print one copy of the ORD and place

in tray 7 in the office labelled, 'Tray 7 – Sales Orders - Awaiting Action'. Fill in the details on the whiteboard. When the customer answers the queries and the order can proceed, remove from whiteboard, collect order from tray 7 and proceed, ensuring any applicable notes are written on the original order paperwork and any relevant emails are printed and attached.

When you are satisfied that all the prices and carriage charges are correct or have been accepted by the customer, return to the customer account in Opera.

Enter the part number in the 'Reference' box.

Hit the down arrow or the tab key on the keyboard, this should fill in the description as per the purchase order. If a dialog box appears, read the notes to ensure nothing is missed and press Esc or F9 to proceed.

Enter the quantity noted on the purchase order in the 'Quantity' box and press F9.

Ensure the pricing and quantity is correct before proceeding.

When all items on the purchase order have been entered, the carriage must be added.

To establish which courier to use, check the 'UK Postage Pricing Guide' document VM3COP03.011 (Doc ID: 16501) For Royal Mail, enter 'PPRD' into the 'Reference' box; for UPS, enter 'PPUPS1' into the 'Reference' box.

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Quantity should always be 1 unless advised otherwise by Goods Out.

Enter the required price into the 'Sell' box, leave blank if the order qualifies for free carriage, press F9 to complete the line.

If you are unsure of which courier to use or of how much carriage to charge, check the Opera stock memo, Intrastats memo, check with colleagues in the office or with the Goods Out department.
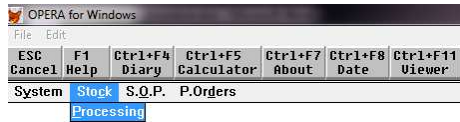
To check an Opera stock memo, from the menu page in Opera, click 'Stock' and click 'Processing'.
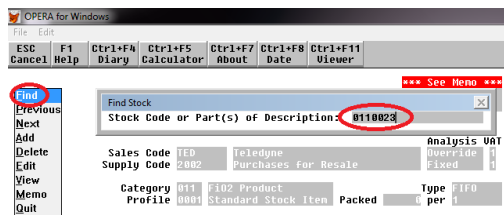
Click 'Find' and type the part number you require further information on, press the 'Enter' key.
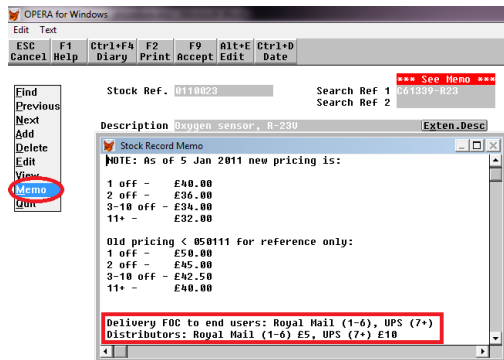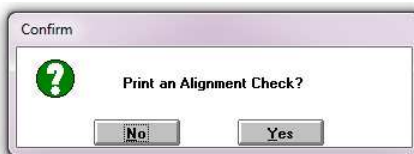

Click 'Memo' and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.

When you have all of the products and one carriage line entered into Opera, press 'F9 Accept' to complete the order.
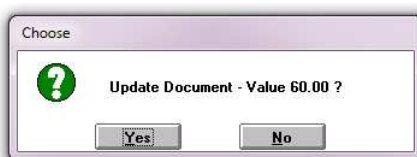
This message will be displayed, click 'Yes' to confirm the order is correct.

When this message is displayed, click 'No' as an Alignment Check is not needed at this point.
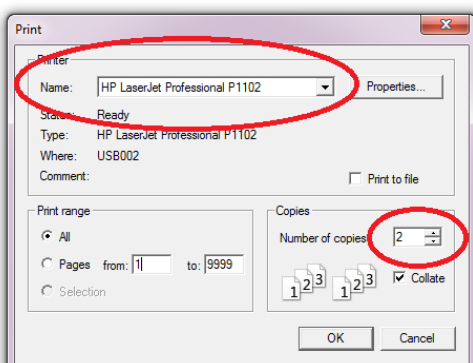
The print dialog will display, choose the correct printer from the drop down box and select 2 for the 'Number of copies'. 2 copies are needed, one is kept with the purchase order after checking and the other is taken to Goods Out.

If the memo or purchase order state any specific requirements that Goods Out need to know, such as the customer needs their own labels adding to sensors, hand write a note on both copies of the ORD. You must initial and date any hand-written notes.
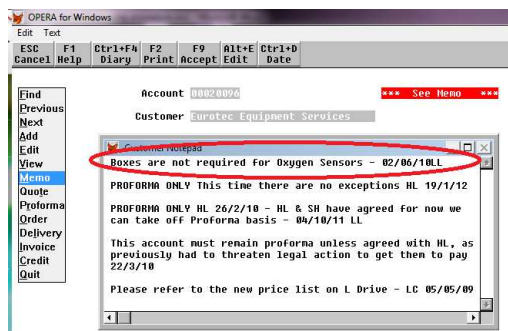
Secure the purchase order, both copies of the ORD and any correspondence together with a paperclip and place in the checking tray (tray 4). If the customer is paying with a credit or debit card (Please note: we do NOT accept American Express cards) slip 1 must be placed with the ORD's and slip 2 taken to the secure location detail in VM3COP03.02 – How to fill in a credit visa card slip.

Acknowledge the order and advise customer of lead time.

V.A.T.
If an order is V.A.T. exempt, you will need to ensure you acquire a V.A.T. exemption certificate from the customer before proceeding. A new V.A.T. exemption certificate is needed for each order. Place the order on Opera but ensure the priority is stated as '8' until the certificate is received. Once received, pass to the accounts department to ensure it is valid and ask them to sign it.
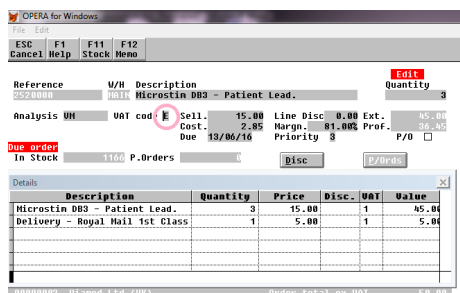
Once validated and signed, ensure the V.A.T. is removed from product and carriage lines. To do this, in Opera, edit the 'V.A.T. code' box from '1' to 'E'.

Carriage
If the order contains products that have both free and chargeable carriage, the carriage is free unless the courier service needs to be upgraded due to the chargeable items.
E.g. If a customer orders 1 box of flow sensors (free carriage), they would normally be sent free via Royal Mail, but if they order an AX300i (chargeable carriage) which does not have free carriage and must be sent via UPS, the courier would need to be upgraded from Royal Mail to UPS and would be chargeable.

Editing an Order
If an order needs editing, for example if the priority needs to be changed. Click 'Find' on Opera and navigate to the correct account, click 'Order' and click on the order you wish to edit and press F6. Change the priority or date as required.

If an order line needs to be edited, continue to the next page, click on the line required and click F6, edit as appropriate and press F9, press F9 again to complete the order. After editing any details, print 2 copies out again and place in the checking tray with original paperwork to be re-checked, as Goods Out will need a new copy of the ORD.

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 both copies of the ORD and hand the order to an office staff member for checking, ensuring they amend the box stating, 'When order picked inform:' to *Your name*.

Once checked, inform Goods Out that there is a priority 1 order coming over and ask them to carry out a mini update. Place one copy of the ORD in the hand of a Goods Out staff member.

If the order is not needed the next day, place the order on the usual priority and make a note on both copies of the ORD for it to be shipped ASAP, inform Goods Out of this.

Discounts
If any order has a discount applied or has any free of charge items/carriage (lines which would normally be chargeable), ask a director to sign both copies of the ORD before 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 'BC', amend the description to 'PayPal Charge' and calculate 6% of the total cost of the order including V.A.T. (excluding this PayPal charge). Add this calculated charge to the 'Sell' 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 a line needs to be inserted to accommodate the PayPal charge, select the line that you would like the new line to appear above and press F7, type the reference number as described above and press F9 to confirm, then press Esc.

Using 'Insert' will always add the new line above the selected line.