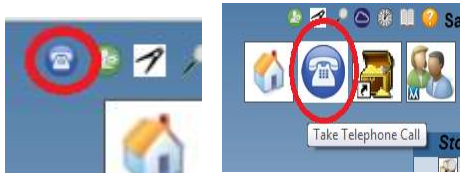


Taking Telephone Orders



Click on the Telephone icon in the top left hand corner of Instrastats.



Click 'Take New Call'

CALL ID #1317 - Taken by Sarah Walton On Thursday 30th of June 2016 12:34:29 PM

Viamed Vandagraph VST Human Med Viamed Properties Generic

Ongoing Query / I'm Done for now Turn to Order Create Issue Type: Call Complete/Close off Telephone Call

Company: Viamed Contact: Derek Lamb

Notes: Would like to place an order for x2 R-17MED

Current User: Sarah Walton Deadline:

Information Search: 0110017

Gathering Information: Serial Number / Barcode Stock OPS Returns Invoice Document Outstanding Orders History of Call #1317

CONTACT not Linked to CRM Database Search

Searching Company AND Contact Name			
Company	Contact	Opera	Tel
Viamed Limited	Derek Lamb	I0000002	Link to CRM
Viamed Ltd	Derek Lamb	00000002	Link to CRM

Searching Company Name			
Company	Contact	Opera	Tel
Viamed Limited	Derek Lamb	I0000002	Link to CRM
Viamed Limited	Derek Lamb	I0000002	ADD Derek Lamb to CRM
Viamed Limited	Jonathan	I0000002	Link to CRM
Viamed Ltd	Derek Lamb	00000002	ADD Derek Lamb to CRM
Viamed Ltd	Cathy Green	00000002	Link to CRM

Start by entering the Company and or Contact name, as you do a list will appear on the right hand side. If the contact details are not included in the CRM database, it will state this in the RED bar "Contact not linked to CRM database". You can utilise the buttons 'ADD to CRM' or 'Link to CRM' to link your call to the database.

Enter in the 'Notes' box which product the customer requires, including stock codes and quantities. In the 'Information Search' box type in the product code and click 'Prices' for the unit prices. Tick the boxes of the prices you have given the customer.

0110017 Oxygen sensor R-17MED Prices Stocks Info Related

0110017 Oxygen sensor R-17MED (Tick a checkbox if price / qty given out on the phone)

☒ Viamed Opera Price: £40.00

<input checked="" type="checkbox"/> VIAMED	GBP End User	1 = £40.00	<input type="checkbox"/> 2 = £36.00	<input type="checkbox"/> 3 = £34.00	<input type="checkbox"/> 11 = £32.00
<input checked="" type="checkbox"/> VIAMED	GBP Distributor	1 = £28.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> VIAMED	Euro End User	1 = €56.00	<input type="checkbox"/> 2 = €50.40	<input type="checkbox"/> 3 = €47.60	<input type="checkbox"/> 11 = €44.80
<input checked="" type="checkbox"/> VIAMED	Euro Distributor	1 = €26.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> VIAMED	USD End User	1 = \$63.50	<input type="checkbox"/> 2 = \$57.15	<input type="checkbox"/> 3 = \$53.98	<input type="checkbox"/> 11 = \$50.80
<input checked="" type="checkbox"/> VIAMED	USD Distributor	1 = \$32.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> VIAMED	Standard Web Price Pounds	1 = £40.00	<input type="checkbox"/> 2 = £36.00	<input type="checkbox"/> 3 = £34.00	<input type="checkbox"/> 11 = £32.00

Click 'Stocks' to check availability.

Searching for 0110017

Reference	Quantity	LocationID	Location	Sellat
0110017	1	126487	Main Office Stock Room 1 Row 1 Block 2 Shelf 3	✓
0110017	1	126504	Main Office Stock Room 1 Row 1 Block 2 Shelf 2	✓
0110017	26	126522	Main Office Stock Room 1 Row 1 Block 1 Shelf 4 - Away From Duckett Wall	✓
0110017	658	126558	Main Office Stock Room 3 Row 1 Block 3 Shelf 2 - Untested	✓
0110017	6	126715	Main Office Stock Room 6 Row 9 Block 1 Shelf 5	✗
0110017	1	126719	Main Office Stock Room 4 Row 3 Block 2 Shelf 3 - Exhibition only	✗

☒ Viamed
 ☐ Vandagraph
 ☐ VST
 ☐ Human Med
 ☐ Viamed Properties
 ☐ Gener

Ongoing Query / I'm Done for now

 Create Issue
 Type: Call
 Complete/Close off Telephone Call

Company: Viamed
 Contact: Derek Lamb

Select 'Turn to Order'

The telephone order screen will appear.

Make sure that you select 'Telephone Order' or 'Quotation' if a quote is required and if you have advised the customer of carriage charges, please tick the box. Make sure you fill out the required information in the blank boxes, including email address, direct telephone number and purchase order number. Once all information has been added for the order, click 'Update'.

Viamed
 Contact
☒ Telephone Order
☐ Quotation
☒ Customer advised of Carriage charges

Name: Derek Lamb
 Department:
 Email: S.Derek.Lamb@fakemail.com
 Direct Tel:

Purchase Method
 Order Number:
 Use VISA slip for Credit Cards

Order Notes:
 Would like to place an order for x2 R-17MED

Telephone Order ID 5481

Date: Thursday 30th of June 2016 03:52:20 PM
 Taken by: Sarah Walton
 Contact Name: Derek Lamb
 Contact Department:
 Contact Email: S.Derek.Lamb@fakemail.com
 Contact Telephone:
 Contact Account:

Invoice Address **Delivery Address**

Order Notes:
 Would like to place an order for x2 R-17MED
 Order Number:

Customer advised of Carriage costs : YES
 Credit Card Details:
 Card Type:
 Name On Card:
 Card No.:

Click 'Printer Friendly' and print out the order and put in the 'Tray 3 – Sales Order – New' tray in the office.

