Sending Samples Checklist

☐ Director authorisation on samples request paperwork
☐ SOR number
☐ Items been scanned to SOR
☐ Signed delivery note/shipping invoice
☐ Second copy of first page of delivery note/shipping invoice
☐ Feedback form
☐ Cover letter on letterhead
☐ Relevant leaflet and price list
☐ Relevant Sales Manager's business card
☐ Blue Viamed folder
☐ Schedule an issue for follow-up

Paperwork Checklist

| To File	To Ship
Copy of delivery note/shipping invoice	Signed delivery note/shipping invoice
Signed samples request paperwork	Cover letter
	Customer SOR feedback form
	Price list
	Leaflet
	Sales Manager's business card
	Blue Viamed folder

Creating the SOR Record

1. Print the sample request if requested by email.

   If the samples were requested verbally, add a telephone order and print.

   Gain authorization from a Director and their initials/date on the request paperwork.
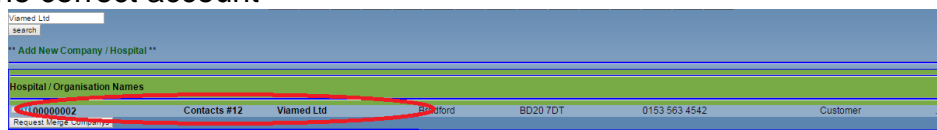
2. From the Lookup/Magnifying Glass tab in Intrastats, Click in the 'Contacts' field and type the company/contact name or account number.
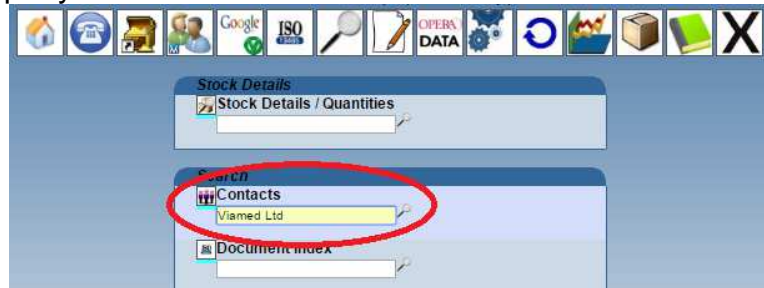
   Alternatively, click the CRM button and click, 'Contact Management'. You can then search from the search field
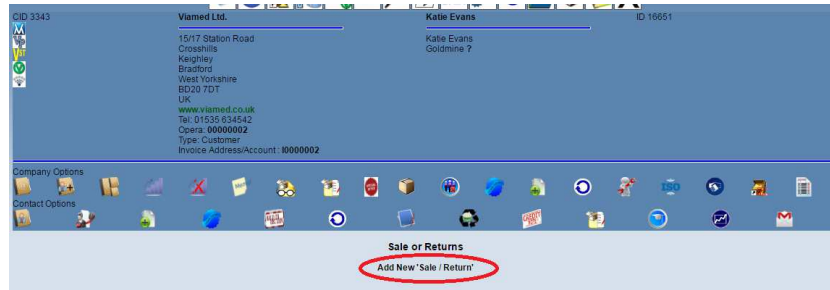

3. Click the correct account

4. Click on the required name

5. Click on the Sale or Return icon

6. Click, "Add New 'Sale/Return'"

7. This will direct you to the main sale/return page and automatically create a new Sale or Return for the contact

Request Stock Movement

8. Click the link located at the bottom of the page named,
   'Request new stock item to be scanned to Sale or Return'.

9. Fill in the issue, detailing part number(s) quantity required and SOR number.
   Note: ensure that you use the single sample part number if the item is normally
   supplied as a pack or use the designated sample pack part number where
   available.

   Send this issue this to the person in Goods Out, fill in the 'Opera A/c number',
   'Stock ref' and click "Add Issue".

10. When the issue has been added, this screen will be displayed. Click the issue
    number in the top left corner and print the PDF.

Alternatively, make a note of the issue number and navigate to the 'HOME' tab on
Intrastats. Click on the issue number.

Click on the print icon to print the PDF.
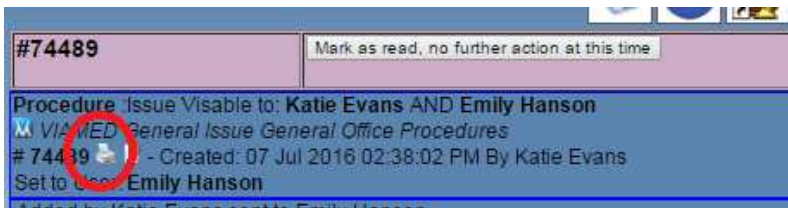
When printed, place in the picking tray in Goods Out.

N.B. if the item is urgent, also inform Goods Out verbally.

Adding Stock Items to SOR Record

When the items have been scanned to the SOR shelf, Goods Out will return the issue to you with barcode ID's; you need to add these to the SOR record.

11. Return to the main SOR page located in Intrastats>Stock icon>"Sale or Returns"

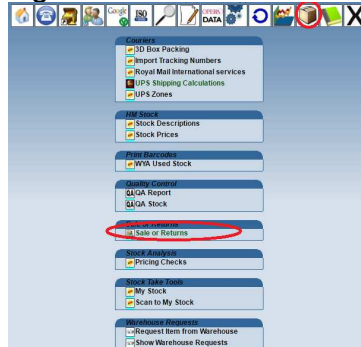12. In the top list "Sale Returns Not Sent / In Preparation" click the box icon in the 'Add' column for the correct customer/SOR number.

13. On the next page, select the item you want to send from the 'Barcode' drop-down menu using the ID's given to you in the issue from Goods Out.

14. 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".

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"

15. In the drop-down box next to the "Submit" button, select "Giving". If the samples are for an export customer then a value needs to be entered in the, "Value for Customs if applicable" field. Consult with the International Sales Manager or the Commercial Director for the customs value to use.

Click "Submit".

Shipping the Samples

16. Return 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) or Export for non-UK customers.

17. Save the delivery note/shipping invoice PDF to U drive>Current year>Current month in the following format,

Export: "SOR Shipping Invoice - *Customer Name* - SOR*** - date backwards"

UK: "SOR Delivery Note - *Customer Name* - SOR*** - date backwards"
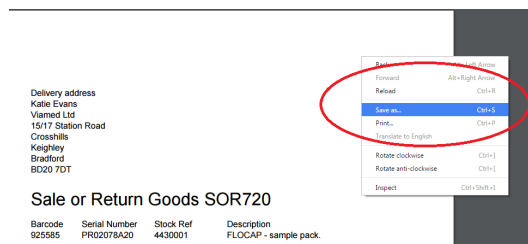
18. Print one copy of the delivery note/shipping invoice. Print a second copy of the first page of delivery note/shipping invoice for filing.

If the sample is for a UK customer, strike through the "Form of Indemnity A" section and ask a director or sales manager to sign the "Form of Indemnity B" in order to pass ownership of the sample to the customer.

If this is for an export customer, this page will not be printed.

19. On the main Sale Or Return screen, click the link `Viamed Product Trial Feedback Form`

20. Click on the PDF icon

21. This will open the feedback form; print one copy of this to send with the goods to allow the customer to provide feedback.

22. From GoldMine, navigate to the contact and click, "write", Select, "SOR – Samples" to generate a covering letter stating that the goods are being supplied as free of charge samples. Please ensure to amend as necessary and read carefully to ensure that the content is appropriate. Print on letter-headed paper.
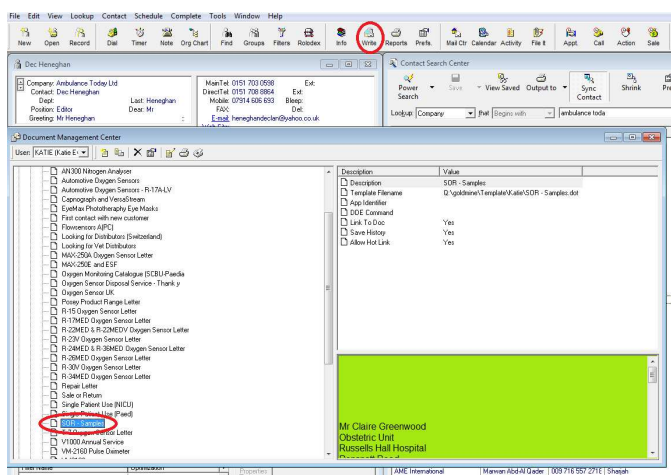
23. Place the **cover letter, signed NHS Delivery Note/shipping invoice, feedback form**, **leaflet** and **price list** (where appropriate) into a **blue Viamed folder** with the relevant Sales Manager's **business card** and take to Goods Out.

N.B. If the item is a pre-prepared sample pack, check whether it already contains a leaflet and appropriate price list.

If the samples are for an export customer or distributor, or a UK distributor, always print a price list in colour to include with the samples. Price lists can be found in L:\Medical.

24. Staple the request paperwork with director's signature to a copy of the first page of the SOR delivery note/shipping invoice and place them in the "Samples SOR Paperwork" file located in the office as per VM3COP20.28.

To File	To Ship
Copy of delivery note/shipping invoice	Signed delivery note/shipping invoice
Signed request paperwork	Cover letter
	Customer SOR feedback form
	Price list
	Leaflet
	Sales Manager's business card
	Blue folder

Following up the Evaluation

25. The sender needs to schedule themselves a follow up issue to discuss the product with the customer, obtain feedback and determine the outcome of the evaluation.

26. If following up by email, please direct the customer to the online feedback form: http://www.viamed.co.uk/trial-feedback

27. When the recipient has been followed up, return to the main Sale or Return page by clicking on the 'Stock' icon and clicking, 'Sale or Returns'

28. Click, 'analyse_sale_return'

29. Locate the SOR number for the customer you are following up, this can be identified by the SOR number on the left. Click the button on the corresponding line named, 'I've chased this up', this will then display the name and date of the person who dealt with it.

30. When feedback is received, add an issue as per 'Issues Overview' Doc ID: 12395 under the 'Feedback' meeting name, and select either 'Product Feedback Negative' or 'Product Feedback Positive' as appropriate. If the feedback relates to our service, add an issue as per 'Issues Overview' Doc ID: 12395 under the 'Feedback' meeting name, and select either 'Customer Feedback Negative' or 'Customer Feedback Positive' as appropriate.

This feedback can also be viewed for reference from the 'Add Issue' page by clicking on the number in the 'Total Inc Complete' column.

Production	Production Schedule		106
CE Technical Files	CE Technical Files	1	29
Feedback	Company Innovation		2
Feedback	Customer Feedback Negative	6	157
Feedback	Customer Feedback Positive		107
Feedback	Product Feedback Negative	18	403
Feedback	Product Feedback Positive		134
Feedback	Product Innovation	1	3
Feedback	Systems Innovation		2
Feedback	VIAMED Feedback	1	182
Product Catagories	Oxygen Hoods		9
Product Catagories	Product Catagories		1