

## 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

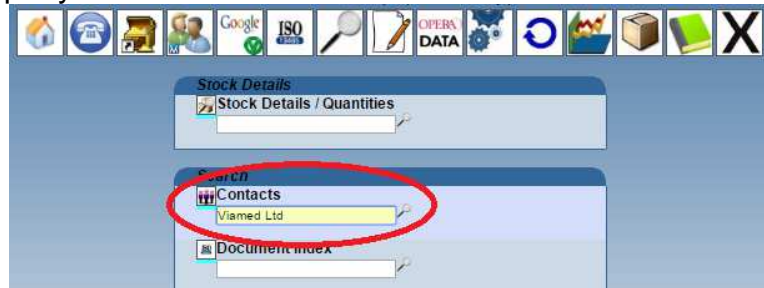
## Creating the SOR Record

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.

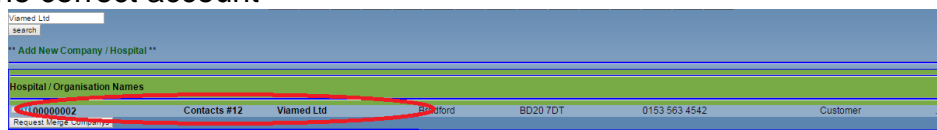
2. From the Lookup/Magnifying Glass tab in Intrastats, Click in the 'Contacts' field and type the company/contact name or account number.



Alternatively, click the CRM button and click, 'Contact Management'. You can then search from the search field



3. Click the correct account



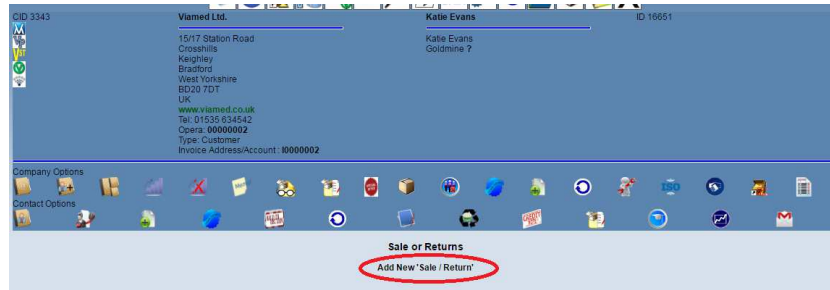
4. Click on the required name

Contact	Department	Position	Direct Phone	Email			
New Order: Cathy Green							
New Order: Catrin Hollings	Marketing	Marketing	0127 439 8359	catrin.hollings@gmail.com			?
New Order: Derek Lamb	Information Systems						
New Order: Helen Lamb	Accounts	Account manager	0153 563 4543	helen@lamb.uk.net			?
New Order: John Lamb		Chairman		john.lamb@viamed.co.uk			?
New Order: Jonathan Connor	Goods In						?
New Order: Katie Evans							?
New Order: Keith Taylor				viamed.keith.taylor@gmail.com			?
New Order: Ruth Hardaker							?
New Order: Ryan Swaine	Export Sales	Export Sales		ryan.swaine@viamed.co.uk			?
New Order: Steve Hardaker	Sales	Sales UK Manager	0153 563 4542	steve.hardaker@viamed.co.uk			?
New Order: Steve Nixon							?

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

**Add a New Sale / Return Completed Sale / Returns analyse\_sale\_return**

Please Send with all sale or return goods the  
Product Trial - Sale or Return Terms and Conditions  
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Ass	Shipping Notes	Send
SOR629	00002360	01/Dec/2014	Airedale General Hospital	+	+	+
SOR682	00002360	03/Dec/2015	Airedale General Hospital	+	+	+
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	+	+	+
SOR705	00007395	30/Mar/2016	Cortessia Medical (Euro)	+	+	+
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)	+	+	+
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	+	+	+
SOR627	00000590	24/Nov/2014	Royal Bolton Hospital	+	+	+
SOR671	00002220	16/Aug/2015	Royal Free Hospital	+	+	+
SOR692	00000009	26/Feb/2016	Staff Purchasing account	+	+	+
SOR693	00000009	26/Feb/2016	Staff Purchasing account - KE	+	+	+
SOR674	00002130	26/Sep/2015	University Hosp of Hartlepool	+	+	+
SOR718	00000002	23/May/2016	Viamed Ltd	+	+	+
SOR720	00000002	23/May/2016	Viamed Ltd	+	+	+

## Request Stock Movement

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

Barcode	Serialnumber	Stock Ref	Description
188186	82103448	0014825	Pulse Oximetry Wrap Sensor
868288	Tracking1	0034993	Disposable SpO2 Sensor - Adult
868297	Tracking10	0034993	Disposable SpO2 Sensor - Adult
868298	Tracking11	0034993	Disposable SpO2 Sensor - Adult
868299	Tracking12	0034993	Disposable SpO2 Sensor - Adult
868300	Tracking13	0034993	Disposable SpO2 Sensor - Adult
868301	Tracking14	0034993	Disposable SpO2 Sensor - Adult
868397	Tracking3	3210070	Silicone Face Mask, Size 0
868423	Tracking29	3210070	Silicone Face Mask, Size 0
868424	Tracking30	3210070	Silicone Face Mask, Size 0
868425	Tracking31	3210070	Silicone Face Mask, Size 0
868436	80720145	4410050	Camcorder VM 2000-M
868552	Tracking754433_0	4420512	

Request New Stock Item to be scanned to Sale or Returns

- 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".

VIAMED Stock Meeting - Sale or Returns

Subject  
Request Scanning Item to Sale or return  
Please scan to Stock Ref Location ID34133  
Stock Reference : 4430000

Issue To: Catherine Spence  
Related to Issue  
Stock Ref: 4430000  
PO Ref:  
Opera A/c: 00000002  
Mark as Important  
Mark as Read only  
Add Issue

Existing Open Issues in VIAMED Stock Meeting - Sale or Returns

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

#81731 New Issue Subject - Outstanding

Issue #81731  
Office Meeting Office Procedures Office Procedures  
Issued To: Katie Evans  
Created: Not Viewed  
Completed Still Outstanding

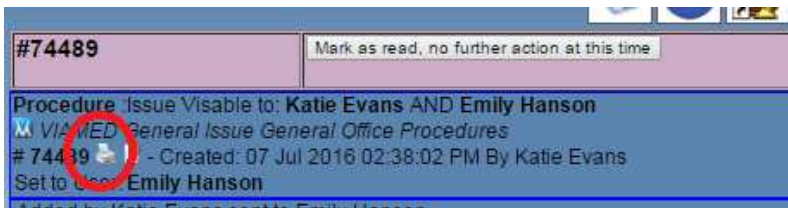
Notes  
Added by Katie Evans sent to Katie Evans  
Issue generated to demonstrate how to print for procedure

Attach File to new Issue  
Add Another Issue Related to This Issue  
Add Another Issue to Section  
Send Email to Katie Evans

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

Katie Evans	Sent to Others
Outstanding 16	Unread 2
Ready For Completion 0	Outstanding 17
Total issues waiting Katie Evans's action 16	Total issue's waiting on others 19

Click on the print icon to print the PDF.



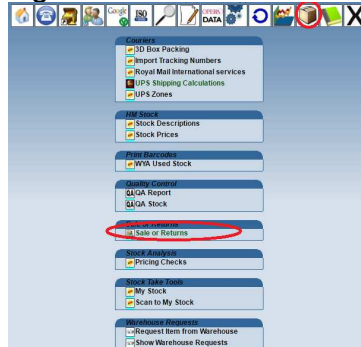
When printed, place in the picking tray in Goods Out.

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.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return									
Please send with all sale or return goods the Product Trial - Sale or Return Terms and Conditions Vatted Product Trial Feedback Form									
Sale Returns Not Sent / In Preparation									
SOR	Account	Created	Name	Age	Region	Notes	Add	Remove	Print
SOR623	00002360	31-Dec-2014	Alexandra General Hospital	499	ENG				
SOR642	00000490	23-Feb-2015	Birmingham Heartlands Hospital	499	ENG				
SOR705	00007965	30-Mar-2016	Coronaria Medical (Euro)	499	ENG				
SOR717	00007314	23-May-2016	Medwest Ltd (Euro)	499	ENG				
SOR681	00005172	11-Nov-2015	Princess Royal University Hospital	499	ENG				
SOR627	00000590	24-Nov-2014	Royal Bolton Hospital	499	ENG				
SOR671	00003220	18-Aug-2015	Royal Free Hospital	499	ENG				
SOR682	00000000	24-Feb-2016	Staff Purchasing account - KE	499	ENG				
SOR693	00000009	23-Feb-2016	Staff Purchasing account - KE	499	ENG				
SOR674	00002130	08-Sep-2015	University Hosp of Hantspool	499	ENG				
SOR718	00000002	03-May-2016	Viamed Ltd	499	ENG				
SOR720	00000002	23-May-2016	Viamed Ltd	499	ENG				

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.

Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company:   
 Contact:   
 Department:   
 Address:   
 PostCode:   
 Value for Customs if applicable:

Barcode:

Purpose of Device:

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".

Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company:   
Contact:   
Department:   
Address:   
  
  
  
  
PostCode:   
Value for Customs if applicable:

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3210070 Silicone Face Mask, Size 0 Tracking2 (ID580397)   
Disposable SpO2 Sensor - Adult  Purpose of Device   
Free of charge sample for evaluation  The trial/testing to be undertaken by the authority (if any)

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Current items on sale Return id #742

Stock Ref	Serial number	Barcode	Description	Type	
0034993	Tracking22	866309	Disposable SpO2 Sensor - Adult	g	<input type="button" value="Remove"/> <input type="button" value="Print Delivery Note (Today date)"/> <input type="button" value="Print Delivery Note (Created date)"/>

## Shipping the Samples

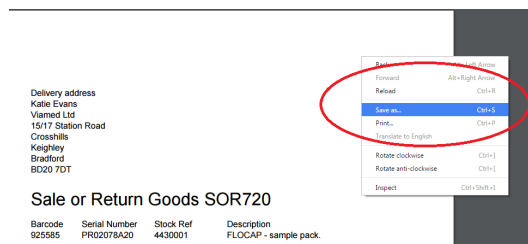
16. Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note. Depending upon the location of the customer (England, Wales and Northern Ireland use the same form, Scotland has its own) or Export for non-UK customers.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return						
Please Send with all sale or return goods the Product Trial - Sale or Return Terms and Conditions Viamed Product Trial Feedback Form						
Sale Returns Not Sent / In Preparation						
SOR	Account	Created	Name	ASL	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital	48	eng	
SOR682	00002360	03/Dec/2015	Airedale General Hospital	48	eng	
SOR723	00007356	31/May/2016	Aspa A.S	48	eng	
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	48	eng	
SOR705	00007995	30/Mar/2016	Cortess Medical (Euro)	48	eng	
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)	48	eng	
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	48	eng	
SOR722	00012966	27/May/2016	Priony Hospital Chelmsford	48	eng	
SOR627	00000550	24/Nov/2014	Royal Bolton Hospital	48	eng	
SOR671	00003220	19/Aug/2015	Royal Free Hospital	48	eng	
SOR692	00000009	26/Feb/2016	Staff Purchasing account	48	eng	
SOR693	00000009	26/Feb/2016	Staff Purchasing account - KE	48	eng	
SOR674	00002130	05/Sep/2015	University Hosp of Harlepool	48	eng	
SOR718	00000002	09/May/2016	Viamed Ltd	48	eng	
SOR720	00000002	23/May/2016	Viamed Ltd	48	eng	

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`

Add a New Sale / Return Completed Sale / Returns analyse_sale_return						
Please Send with all sale or return goods the Product Trial - Sale or Return Terms and Conditions Viamed Product Trial Feedback Form						
Sale Returns Not Sent / In Preparation						
SOR	Account	Created	Name	ASL	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital	48	eng	
SOR682	00002360	03/Dec/2015	Airedale General Hospital	48	eng	
SOR723	00007356	31/May/2016	Aspa A.S	48	eng	
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	48	eng	
SOR705	00007995	30/Mar/2016	Cortess Medical (Euro)	48	eng	
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)	48	eng	
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	48	eng	
SOR722	00012966	27/May/2016	Priony Hospital Chelmsford	48	eng	

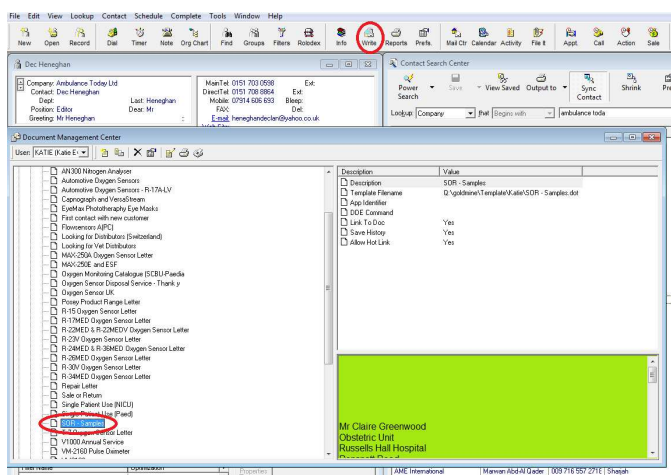


20. Click on the PDF icon



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.**

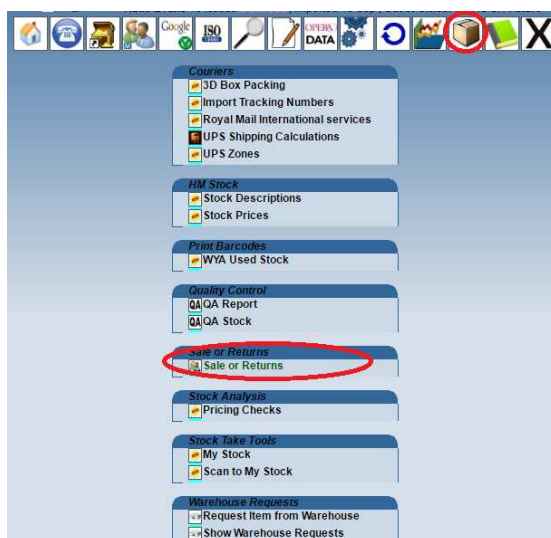
If the samples are for an export customer or distributor, or a UK distributor, always print a price list in colour to include with the samples. Price lists can be found in L:\Medical.

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

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.

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'





**Add a New Sale / Return Completed Sale / Returns analyse\_sale\_return**

Please Test with all sale or return goods the Product Trial, Sale or Return Terms and Conditions Vainmed Product Trial Feedback Form

Rate Returns Not Test / In Preparation

BOX	Account	Invoice	Name	Unit	Remaining Order	Send
SORT53	00001430	15/Sep/2016	Dorset County Hospital	400	100	
SORT54	00002662	16/Sep/2016	Liverpool Women's Hospital	400	100	
SORT51	00005430	15/Sep/2016	New Cross Hospital	400	100	
SORT45	00000050	24/Aug/2016	Royal Brompton Hospital	400	100	
SORT52	00002020	15/Sep/2016	Royal Surrey County Hospital	400	100	
SORT50	00004470	15/Sep/2016	Salisbury District Hospital	400	100	
SORT33	00004510	08/Jun/2016	Southampton General Hospital	400	100	
			Southampton General Hospital	400	100	

[illegible]

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.

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