

Sending SOR Checklist

- ☐ Director authorisation on SOR request paperwork
- ☐ SOR Terms and Conditions signed by customer
- ☐ SOR number
- ☐ Items been scanned to SOR
- ☐ Quotation
- ☐ 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

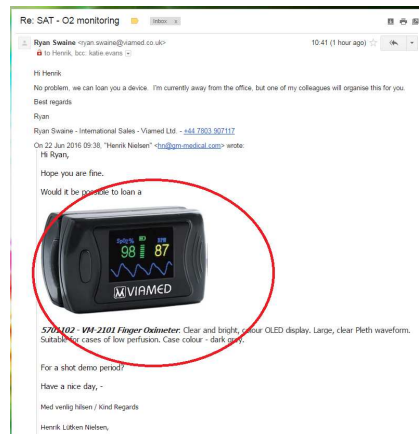
Paperwork Checklist

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

VM3COP20.13 Sending Sale or Return Orders

Beginning the Process

1. Print the Sale or Return request if requested by email, if the request was verbal/telephone, add a telephone order and print as per VM3COP27.29. Gain authorization from a Director and their signature/date on the request paperwork.



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



3. Click the correct account

Hospital / Organisation Names					
00009300	Contacts #6	Bluepoint Medical GmbH & Co. KG	0049 388 235488029	Supplier	Extra Search
00007327	Contacts #5	GM Medical	4545 570 881	Customer	-
00007327	Contacts #1	GM Medical A/S	3480 +454 557 0881	Customer End User	-
00007327	Contacts #2	GM Medical A/S	3480 0045 455 70881	Customer End User	-
00006249	Contacts #1	Lemmon Medical GmbH	D-97762	Customer End User	-
00006249	Contacts #1	Lemmon Medical GmbH	Hammelburg, Germany	Customer End User	-
00007521	Contacts #1	Mefina Medical GmbH & Co KG	40699	Customer End User	-

4. Click on the required name

CID 6382

GM Medical A/S.

Topstykket 7

Birkeroed

Denmark

3460

Denmark

Tel: 0045 45570881

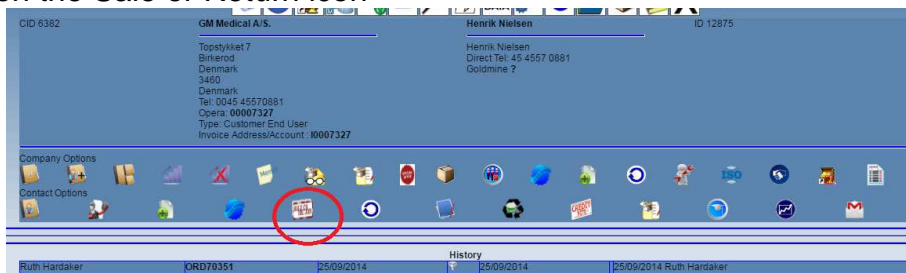
Opera: 00007327

Type: Customer End User

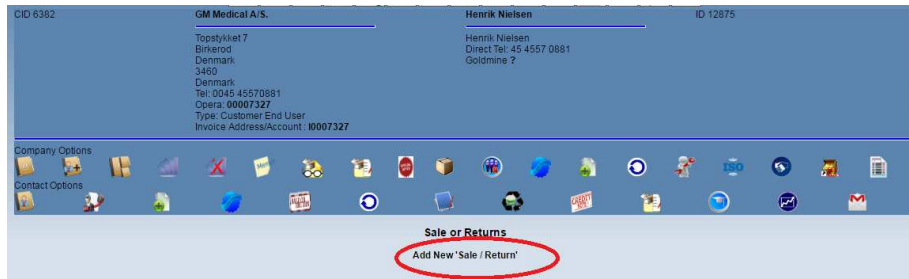
Invoice Address/Account: 00007327

Company Options

5. Click on the Sale or Return icon



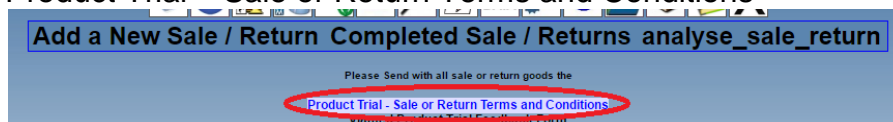
6. Click, "Add New Sale/Return"



This will direct you to the main sale/return page and create a new record 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						
Viaimed Product Trial Feedback Form						
Sale Returns Not Sent / In Preparation						
BCR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital	+	+	+
SOR682	00002360	03/Dec/2015	Airedale General Hospital	+	+	+
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	+	+	+
SOR705	00007995	30/Mar/2016	Corfessis Medical (Euro)	+	+	+
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital	+	+	+
SOR720	00007327	22/Jun/2016	GM Medical A/S	+	+	+
SOR717	00007374	23/May/2016	Mediven (C) Corcor	+	+	+
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	+	+	+
SOR722	00012966	27/May/2016	Prory Hospital Chelmsford	+	+	+
SOR627	00000590	24/Nov/2014	Royal Bolton Hospital	+	+	+
SOR671	00003220	19/Aug/2015	Royal Free Hospital	+	+	+
SOR692	00000009	26/Feb/2016	Staff Purchasing account	+	+	+
SOR693	00000009	29/Feb/2016	Staff Purchasing account - KE	+	+	+
SOR724	00004890	16/Jun/2016	Stepping Hill Hospital	+	+	+
SOR674	00002130	08/Sep/2015	University Hosp of Hartlepool	+	+	+
SOR716	00000002	09/May/2016	Viaimed Ltd	+	+	+
SOR720	00000002	23/May/2016	Viaimed Ltd	+	+	+
SOR725	00003450	16/Jun/2016	Whipps Cross University Hospital	+	+	+
SOR726	00003450	16/Jun/2016	Whipps Cross University Hospital	+	+	+
SOR727	00003450	16/Jun/2016	Whipps Cross University Hospital	+	+	+

7. Click 'Product Trial – Sale or Return Terms and Conditions



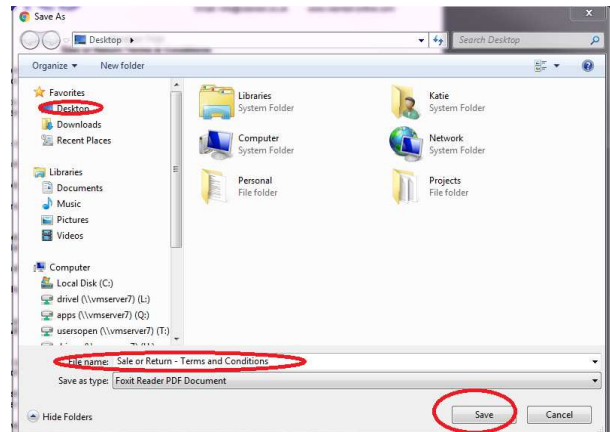
8. Click the PDF icon to open the file

Search inside document text if possible						
Product Trial - Sale or Return Terms and Conditions						
Company ISO Manual Files Index						
	Document ID	Type	Description	More	Usage	Added
	6811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	Details	Unrestricted	19 Feb 2010

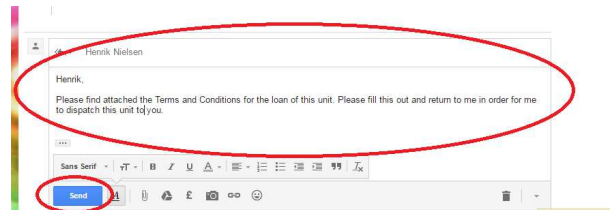
9. When the file opens, click on the download icon located at the top-right of the screen



10. When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'

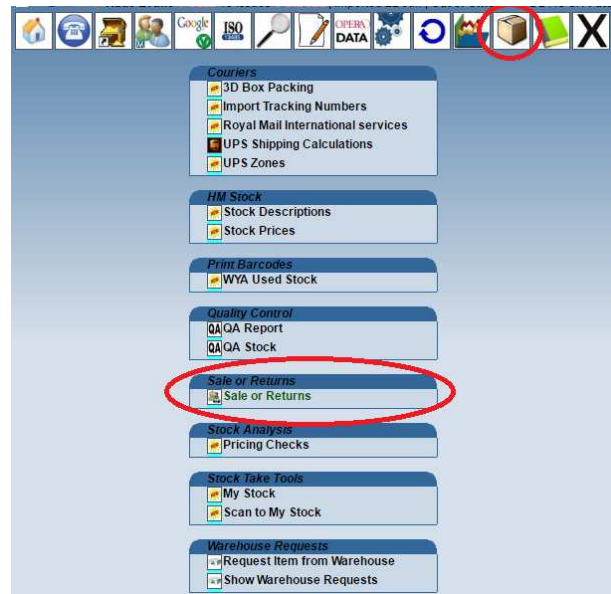


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email to the left.



Requesting Stock Movement

12. Return to Intrastats and click on the stock box icon. From this page, click on 'Sale or Returns'



13. Scroll to the bottom of the page and click "Request new stock item to be scanned to Sale or Return".

Barcode	Serialnumber	Stock Ref	Description
788186	EDL03489	0014835	Pulse Chemistry Wrap Sensor
86288	Tracking1	0034993	Disposable SpO2 Sensor - Adult
86287	Tracking10	0034993	Disposable SpO2 Sensor - Adult
86298	Tracking11	0034993	Disposable SpO2 Sensor - Adult
86299	Tracking12	0034993	Disposable SpO2 Sensor - Adult
86300	Tracking13	0034993	Disposable SpO2 Sensor - Adult
86301	Tracking14	0034993	Disposable SpO2 Sensor - Adult
86397	Tracking3	3210070	Silicone Face Mask, Size 0
86423	Tracking29	3210070	Silicone Face Mask, Size 0
86424	Tracking30	3210070	Silicone Face Mask, Size 0
86425	Tracking31	3210070	Silicone Face Mask, Size 0
86436	80730145	4410500	Clonograph VM 2500-M
86552	Tracking754433_0	4430512	

Request New Stock Item to be scanned to Sale or Return

14. Fill in the issue detailing the part number(s) and quantity required. Send this issue this to the person in Goods Out, fill in the Opera A/c number and click "Add Issue"

VIAMED Stock Meeting - Sale or Returns

Subject
Request Scanning Item to Sale or return

Please scan to Sale or Return Location 1034132
Stock Reference: 4438888

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

15. Print out the issue and place in the picking tray in Goods Out.

Note: if the item is urgent, also inform Goods Out verbally.

When Terms and Conditions are Signed / Generating Quote

When you have received the completed Terms and Conditions from the customer and once you have confirmation from Goods Out that the items have been scanned, you need to add them to the SOR record and create an Opera quote.

Confirmation from Goods Out will come in the form of an issue, in reply to the issue sent to Goods Out.

Take note of the ID number(s) provided for the product(s) scanned.

16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.

Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

Also, in the comments section beneath the name and telephone number of the customer, state "Goods already supplied on SOR***"

Next, the serial numbers need to be typed in the memo for each item sent.

17. Click on the product line and press F12 or click the "F12 Memo" button. This will open the memo.

18. Type the serial number in the format as seen to the left, e.g. "S/N: ???". There may be additional notes here, if so, add the serial number beneath them.

OPERA for Windows

Edit Text

ESC Cancel F1 Help Ctrl+F4 Diary F9 Accept Alt+E Edit Ctrl+D Date

Reference	W/H	Description	Quantity
1410000	MAIN	Foetal Heart Simulator, model U1000.	1

Analysis SP0 UAT code Sell. 595.00 Line Disc 0.00 Ext. 595.00

Transaction Notepad

S/N: PR02194A10

In Stock

Details

Des

Foetal Heart

Courier deliv

00000550 Row

19. When completed, press F9 or click the "F9 Accept" button. You will be asked if you would like to save the changes, click "Yes".

OPERA for Windows

Edit

ESC Cancel F1 Help Ctrl+F4 Diary F9 Accept Alt+E Edit Ctrl+D Date

Reference	W/H	Description	Quantity
1410000	MAIN	Foetal Heart Simulator, model U1000.	1

Analysis SP0 UAT code Sell. 595.00 Line Disc 0.00 Ext. 595.00

Transaction Notepad

S/N: PR02194A10

In Stock

Details

Des

Foetal Heart

Courier deliv

00000550 Row

Confirm

Save Changes ?

No Yes

20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

21. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button

File Edit View Lookup Contact Schedule Complete Tools Window Help

New Open Record Dial Timer Note Org Chart Find Groups Rolodex Info Write Reports Prefs Mail Ctr Calendar Activity File It Appt. Call Action Message Sale GM E-mail E-mail

Henrik Nielsen

Company: GM Medical AS
Contact: Henrik Nielsen
Dept: Product Specialist
Greeting: Mr Nielsen
Last: Nielsen
Dear: Mr
Address: Blokken 11
City: Birkedal
County: Denmark
Postal: DK-3460
Merge:

MainTel: 0045 2175 2972
Ext: Bleep: Det
Fax: E-mail: hn@gm-medical.com
Web Site

Contact Type: unused
Intrastats Code: unused
opera:

Fields: GM+View Notes Contacts Details Referrals Pending History Links

Hot Button: Dec Maker Mail List
Special: Level Open
Territory: Objective File Number

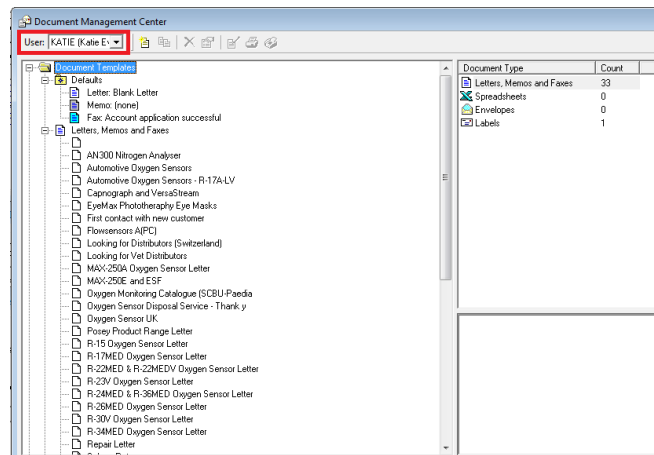
Contact Search Center

Power Search Save View Saved Output to Sync Shrink Prefs Columns

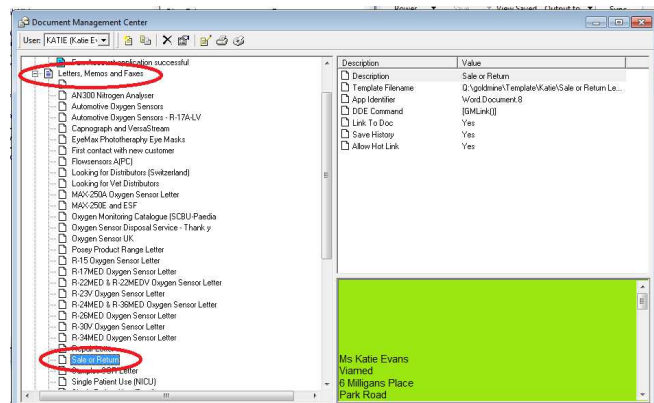
Lookup: Company that Begins with gm medical

Company	Contact	MainTel	City
GlukoMedTech AG	Brian Vestler	002 302 915 200	Witten
GM Medical	Mahmut Hacıoglu		
GM Medical	Henrik Nielsen	0045 45570881	Birkedal
GM Medical AS	Jens Gerfl	0045 45570881	Birkedal
GM Medical AS	Jesper A. Fremming	0045 45570881	Birkedal
GM Medical AS	Jesper Juul	+45 45570881	
GM Medical AS	Kirsten Fremming	0045 45570881	
GM Medical Ltd.	Guna Amar	0208 424 0054	Harlow
gmnl	Gmail Team		
GMC			
Gmredi Co., Ltd	Pete Kim	0082-2-2632-9256	West Allis
GMH	John Khwaja	004 961 027 2302	Seoul
GMH	Mr. Younes	00212 22 90 64 11	Neu-Isenburg
GMHC Corp.	Annalisa Riccio		Carablanca
GMR STRUMENTI SAS	Filippo Rossi	0099532 20 99 81	
GMS	Elena Tashkevich	0090 212346423C	
GMS	Musa Enderer	01527 889 187	
GMS - NPOWER	Kiraly	+49 341255570	Leipzig
GMS GmbH	Thu-Thuy Tran	0696300090	Frankfurt
GMT Gesellschaft fur Laborbe		003 496354 6554	
GMV Sistemas	Ana Fajardo Yuste	01704 536 010	Southport
GNW Instrumentation Ltd	Beverley Edwards		
GO Exhibitions	GO Exhibitions		
GO Exhibitions GmbH	Daniela Mayer	+49 (511) 640 72	Plymouth
Go Medic Event Medical Serv			

22. Ensure the user is set to your name



23. Click on 'Letters, Memos and Faxes' to view the list beneath and double-click the letter named 'Sale or Return'. If this letter cannot be found, speak with the marketing department and request that they add it for you.



24. When the letter opens, amend all the details as indicated in the example to the right, to include the product description, part numbers, SOR number and serial number.

Mr Henrik Nielsen
Product Specialist
GM Medical AS
Blokken 11
Birkeroed, DK-3460
Denmark

June 2016

Dear Mr Nielsen,

Re: **Product Description**, **Sale or Return**, ref **SOR???**

Further to our recent discussions **(Customer Name)** please find enclosed a **(Product Description)**, for the purpose of a trial.

- Part Number **???????** - **(Product Description)** **S/N?**

This product is brand new and unused, so if after evaluation the end user wishes to purchase it, it can just raise an official order and keep the instrument, otherwise we will require it returning in its original packaging.

I have allocated a standard trial period of 4 weeks, and have included a Delivery Note to cover the indemnity for that period. I shall contact you in due course for any feedback and decision as to whether the Trust wishes to purchase it.

Should you have any queries, or wish to discuss the instrument in further detail, please do not hesitate to contact me.

Yours sincerely

Katie Evans
Office Administrator

When complete, read through the letter and ensure the grammar is correct, i.e. if there is more than one item, the words, "This product is" may need to be changed to, "These products are" and remove the word, "Trust" if not for the NHS.

25. When complete, print one copy of this letter on letterhead and save to U drive>current year>current month, with the following format:

Sale or Return - *customer name* - SOR*** - *date backwards* e.g. "Sale or Return – GM Medical – SOR729 – 160622"

26. Print a colour price list from L:\ Drive in the correct currency as found on the customers Opera account.

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

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

Add a New Sale / Return Completed Sale / Returns analyse_sale_return									
Please be aware with all sale or return goods the Product Ref, Sale or Return Terms and Conditions Validated Product Trial Feedback Form									
Sale Returns Not Sent / In Preparation									
SOR	Account	Created	Name	Age	Product Ref	Age	Age	Age	Age
SOR828	00002360	01Dec2014	Aresdale General Hospital	40	00002360	01Dec2014	00002360	00002360	00002360
SOR862	00002360	03Dec2015	Aresdale General Hospital	40	00002360	03Dec2015	00002360	00002360	00002360
SOR842	00004000	23Feb2015	Birmingham Heartlands Hospital	40	00004000	23Feb2015	00004000	00004000	00004000
SOR705	00007695	10Mar2016	Cortess Medical (Euro)	40	00007695	10Mar2016	00007695	00007695	00007695
SOR728	00001900	17Jun2016	Gloucestershire Royal Hospital	40	00001900	17Jun2016	00001900	00001900	00001900
SOR729	00007327	22Jun2016	GM Medical A/S	40	00007327	22Jun2016	00007327	00007327	00007327
SOR717	00007374	03May2016	Medivent Ltd (Euro)	40	00007374	03May2016	00007374	00007374	00007374

29. Ensure the name and address details at the top of the screen are correct.

30. From the "Barcode" drop-down on the next page, select the item you want to send.

Ensure you choose the item with the correct ID number as per the Goods Out confirmation issue.

31. 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 "Measuring concentration of oxygen".

32. In the field entitled "The trial/testing to be undertaken by the authority (if any)" type a brief summary, for example "Sale or Return trial to determine suitability prior to purchase"

In the drop-down box next to the "Submit" button, select "Loan".

33. Repeat for all items required.

34. If the Sale or Return is for an export customer then a value needs to be entered in the, "Value for Customs if applicable". Consult with the International Sales Manager or the Commercial Director for the customs value to use.

35. 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 Vimed Product Trial Feedback Form									
Sale Returns Not Sent / In Preparation									
ROW	Account	Created	Name	Country	Region	City	Postcode	Phone	Fax
SOR130	1402154	23Jun2016	21 Brithon CR Gatta Road	GB	Wales				
SOR628	00002360	01Dec2014	Ardsale General Hospital	GB	Wales				
SOR682	00002360	03Dec2015	Ardsale General Hospital	GB	Wales				
SOR642	00008480	23Dec2015	Birmingham-Hatfield Hospital	GB	England				
SOR705	00007999	30Mar2016	Cardiff Medical (Euro)	GB	Wales				
SOR728	00001900	17Jun2016	Gloucestershire Royal Hospital	GB	England				
SOR729	00007327	23Jun2016	GM Medical A/S	GB	Denmark				
SOR817	00007374	03May2016	Heusden US (Barto)	GB	England				

36. Save the 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"

37. Print the delivery note/shipping invoice and print a second copy of the first page.

If the SOR is for a UK customer, strike through the "Form of Indemnity B" section and ask a director or sales manager to sign "Form of Indemnity A" to ensure that ownership of the unit does not pass to the customer.

38. 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 description returns via web feedback
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SUR	Account	Created	Name	Add	Shipping Notes	Send
SCR628	00002360	01Dec2014	Airedale General Hospital	430	000	0
SCR682	00002360	23Dec2015	Airedale General Hospital	430	000	0
SCR723	00007356	21May2016	Aspa A.S	430	000	0
SCR642	00000490	23Feb2015	Birmingham Heartlands Hospital	430	000	0
SCR705	00007995	30Mar2016	Corbiss Medical (Euro)	430	000	0
SCR717	00007374	03May2016	Medivent Ltd (Euro)	430	000	0
SCR681	00005172	11Nov2015	Princess Royal University Hospital	430	000	0
SCR722	00012968	27May2016	Prory Hospital Chelmsford	430	000	0

39. Click on the PDF icon

Search inside document text if possible

Viamed Product Trial Feedback Form

Company ISO Manual Files Index

Document ID	Type	Description	More	Usage	Added	Expires
16508	Miscellaneous Documents	Viamed Product Trial Feedback Form	Details	Not Set Assume Internal Use ONLY	18 Mar 2016	

40. This will open the feedback form; print one copy of this as it will be sent with the goods to allow the customer to offer feedback.

41. Gather all paperwork and secure with a paperclip, place in the checking tray for an office team member to check.

Notes

Product	Accessories	Loan/Giving
VM-2160	SpO2 sensor (0014750 as standard)	Loan
VM-2500-S/M/MG	SpO2 sensor (0014750 as standard)	Loan
	Sampling lines/airway adapters or Versastream	Giving
	If sending a wrap sensor, an additional four x Posey wraps (part number 0021012) or four x 4000 series sensor wraps (part number 0014889) are required	Giving
AX/MX300i	R-17MED	Loan

Checking an SOR

Ensure the items listed on the delivery note/shipping invoice match the items requested by the customer

Ensure the paperwork to ship with the items have been placed in a blue Viamed folder.

The folder should contain:

Delivery note/shipping invoice signed by a director
Cover letter on letterhead paper
Customer SOR feedback form
Price list for products being sent
Leaflets for products being sent
Quotation for products being sent
Relevant Sales Manager's business card

The paperwork to file should contain:

Copy of delivery note/shipping invoice
SOR request paperwork with director signature
A copy of the quotation for products being sent
Terms & Conditions signed by the customer

Stamp the filing copy of the delivery note/shipping invoice and initial/date next to it. Return to the person who added the SOR.

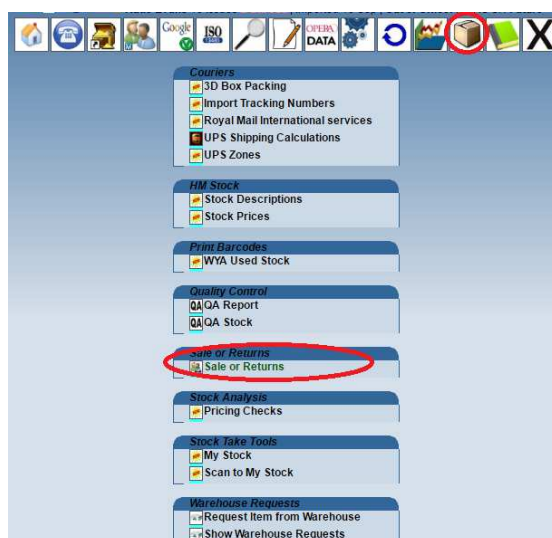
After Checking

When checked by an office team member, staple the request paperwork with director's signature, a copy of the quote, the signed Terms and Conditions to a copy of the first page of the SOR delivery note and place them in the "Active SOR's" file located in the office.

Put one copy of the **Opera quotation, letter, signed NHS Delivery Note (or shipping invoice for export customers), feedback form, leaflet, and price list** into a **blue Viamed folder** with the relevant Sales Manager's **business card** and take to Goods Out.

Following up the Evaluation

1. The sender needs to schedule themselves a follow up issue 4 weeks ahead, to discuss the product with the customer, obtain feedback and determine the outcome of the evaluation. The standard loan time for SOR is 4 weeks.
2. If following up by email, please direct the customer to the online feedback form: <http://www.viamed.co.uk/trial-feedback>.
3. 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'.



4. Click, 'analyse_sale_return'.



5. 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.

SOR	Account	Created	Name	Date	Warehouse	Notes
SOR753	00001430	18Sep2016	Dorset County Hospital	18/09/16	Show Delivery Note	I've chased this up
SOR752	00002020	15/09/16	Royal Surrey County Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR751	00005430	15/09/16	New Cross Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR750	00004470	15/09/16	Salisbury District Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR749	00004735	15/09/16	Southampton General Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR748	10012969	13/09/16	Emergency Medical and Retrieval Transfer Service	13/09/16	Show Delivery Note	I've chased this up
SOR747	00005130	05/09/16	Torbay Hospital	05/09/16	Show Delivery Note	I've chased this up
SOR746	00007885	05/09/16	Jamjoom Medical Industries	05/09/16	Show Delivery Note	I've chased this up
SOR745	00000550	24/08/16	Royal Blackburn Hospital	24/08/16	Show Delivery Note	I've chased this up
SOR743	00002824	09/08/16	Chelsea Westminster Hospital	09/08/16	Show Delivery Note	Katie Evans
SOR742	00007515	09/08/16	Merivaara AB	09/08/16	Show Delivery Note	Katie Evans
SOR741	00001900	08/08/16	Gloucestershire Royal Hospital	08/08/16	Show Delivery Note	Emily Hanson
SOR739	00006304	27/07/16	Artsana Medical	27/07/16	Show Delivery Note	Emily Hanson
SOR737	00003560	13/07/16	Manchester Royal Infirmary	13/07/16	Show Delivery Note	Steve Hardaker

- 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

SOR Purchase

If the customer chooses to purchase the SOR items, they will provide you with an official purchase order; if they have only provided an email agreement to purchase, please request an order number and an official purchase order.

1. Once received, retrieve the SOR paperwork from the SOR file.
2. Locate the account on Opera and press 'O' to open the orders menu, or click on 'Order'.
3. Click on the correct quote and press F9 to convert the quote to an order.
4. When asked if you would like to edit, click yes.

OPERA for Windows

File Edit

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

Find Previous Next ...

Account 00007327 Currency USD *** See Memo ***

Customer GM Medical A/S

Memo	Document	Doc Date	Type	Number	Date	Cust Ref	Status
Memo	Q0097323	22/06/16	Quote	Q0004278	22/06/16	SOR729	Printed

5. Amend the 'Cust Ref' box to the purchase order number and change the 'Due' date to the next available shipping day.
6. A note should have been added at the quote stage, in the 'Comments' section "Goods already supplied on SOR***". Ensure it is still there, if not, add this note.

OPERA for Windows

File Edit

ESC Cancel F1 Help F9 Accept

Find Previous Next ... Add Edit View Memo Quote Proforma Order Delivery Invoice Credit Quit

Account 00007327 Delivery GM Medical A/S

GM Medical A/S Blokken 11

3460 Birkerød Denmark

Cust Ref SOR729 * See Memo * Document Q0097323 22/06/16

Due 22/06/16 Quote Q0004278 22/06/16

Priority 3 W/House MAIN Main Warehouse

Raised By KATIE

Comments Henrik Nielson - +45 4557 0881 Goods already supplied on SOR729

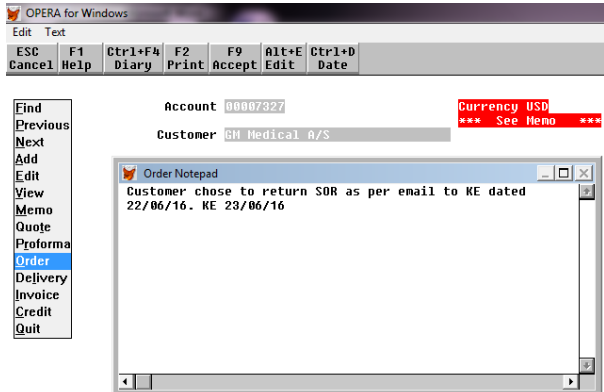
Analysis Currency Discount

7. Press F9 twice to complete the order.
8. Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR***". Place all of the paperwork in the checking tray. Once checked by a member of the office admin team, take the unticked copy of the ORD to Goods Out as per VM3COP20.05 order processing procedure. Goods Out will then invoice the order. The checked paperwork should be filed as per VM3COP20.28 Filing and Archiving.

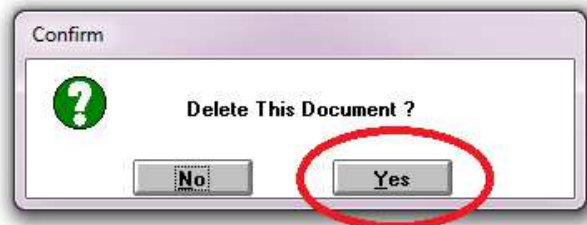
SOR Return

1. If the customer chooses to return the SOR items, issue the customer with a returns reference number (SRS) as per VM3COP20.03 Repair Intrastats Procedure. When the item is received by Goods In, you will receive an issue.

2. When this issue is received, print it. Locate the account and correct quote on Opera. Press F12 and write a memo to say that the customer did not want to purchase the goods and has returned them on SRS****. Initial and date the memo and press F9 to confirm



3. On the next screen, you will see the quote again, press F4 to delete, and click yes when asked to confirm.



4. Retrieve the SOR paperwork from the Active SOR's file located in the office. Write on the front sheet that it has been returned and reference the issue number Goods In sent you to advise it has been returned.
5. Staple all of the SOR paperwork and the printed issue, detailing the confirmation of return, together and place in the Miscellaneous file located in the office as per VM3COP20.28 - Filing and Archiving.