

VM3COP20.13 - Sending SOR's

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

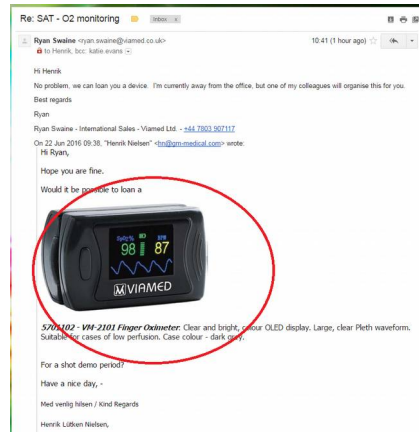
Paperwork Checklist

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



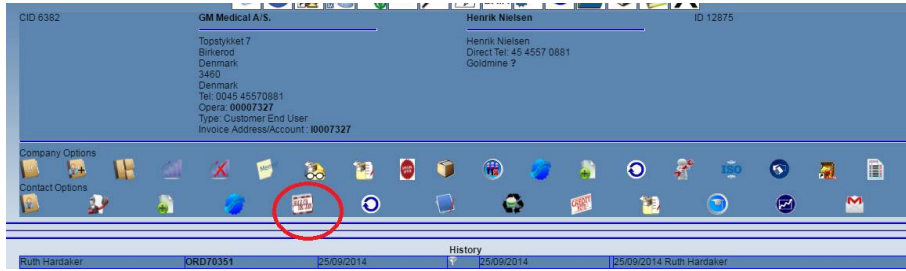
3. Click the correct account

gm medical						
search						
** Add New Company / Hospital **						
Hospital / Organisation Names						
		Contacts #6	Bluepoint Medical GmbH & Co. KG	0049 388 235488029	Supplier	Extra Search
		Contacts #5	GM Medical	4545 570 881	Customer	
		Contacts #2	GM Medical A/S	+454 557 0881	Customer End User	
		Contacts #1	GM Medical A/S	3460 0045 455 70881	Customer End User	
		Contacts #1	Lemon Medical GmbH	4900 97 327881510	Customer End User	
		Contacts #1	Mefina Medical GmbH & Co KG	4900 97 327881510	Customer End User	

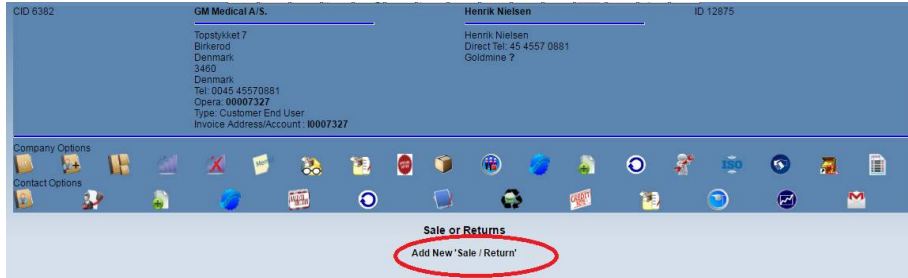
4. Click on the required name

CID 6382		GM Medical A/S	
Topstykke 7		Birkelund	
Denmark		3460	
Denmark		Tel: 0045 45570881	
Opera: 00007327		Type: Customer End User	
Invoice Address/Account: 10007327			
Company Options			
Merge Contacts			
Henrik Nielsen	Department	Position	Direct Phone
Søren Bjerre			4545 570 881
History - Switch to Condensed			
Ruth Hardaker	ORD75997	09/09/2015	Søren Bjerre
Ruth Hardaker	ORD70351	25/09/2014	Henrik Nielsen
09/09/2015 Ruth Hardaker			
25/09/2014 Ruth Hardaker			

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							
Named Product Trial Feedback Form							
Sale Returns Not Sent / In Preparation							
BOR	Account	Created	Name	Add	Shipping Notes	Send	
SOR628	00002360	01/Dec/2014	Airedale General Hospital	+	no	+	+
SOR682	00002360	03/Dec/2015	Airedale General Hospital	+	no	+	+
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	+	no	+	+
SOR705	00007995	30/Mar/2016	Cortess Medical (Euro)	+	no	+	+
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital	+	no	+	+
SOR729	00007327	22/Jun/2016	GM Medical A/S	+	no	+	+
SOR717	00007374	03/May/2016	Medivenho (color)	+	no	+	+
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	+	no	+	+
SOR722	00012966	27/May/2016	Prory Hospital Chelmsford	+	no	+	+
SOR627	00000590	24/Nov/2014	Royal Bolton Hospital	+	no	+	+
SOR671	00003220	19/Aug/2015	Royal Free Hospital	+	no	+	+
SOR692	00000009	26/Feb/2016	Staff Purchasing account	+	no	+	+
SOR693	00000009	29/Feb/2016	Staff Purchasing account - KE	+	no	+	+
SOR724	00004890	16/Jun/2016	Stepping Hill Hospital	+	no	+	+
SOR674	00002130	28/Sep/2015	University Hosp of Hartlepool	+	no	+	+
SOR716	00002002	29/May/2016	Varmed Ltd	+	no	+	+
SOR720	00002002	23/May/2016	Varmed Ltd	+	no	+	+
SOR725	00003450	16/Jun/2016	Whipps Cross University Hospital	+	no	+	+
SOR726	00003450	16/Jun/2016	Whipps Cross University Hospital	+	no	+	+
SOR727	00003450	16/Jun/2016	Whipps Cross University Hospital	+	no	+	+

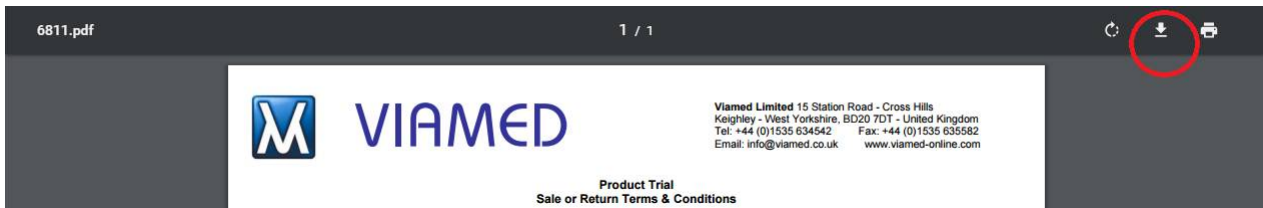
7. Click 'Product Trial – Sale or Return Terms and Conditions



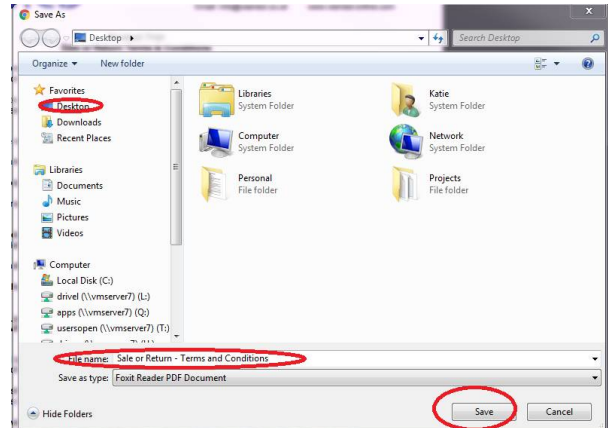
8. Click the PDF icon to open the file

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	Expires	
6811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	Details	Unrestricted	19 Feb 2010		

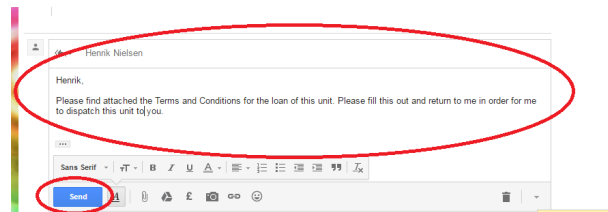
9. When the file opens, click on the download icon located at the top-right of the screen



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

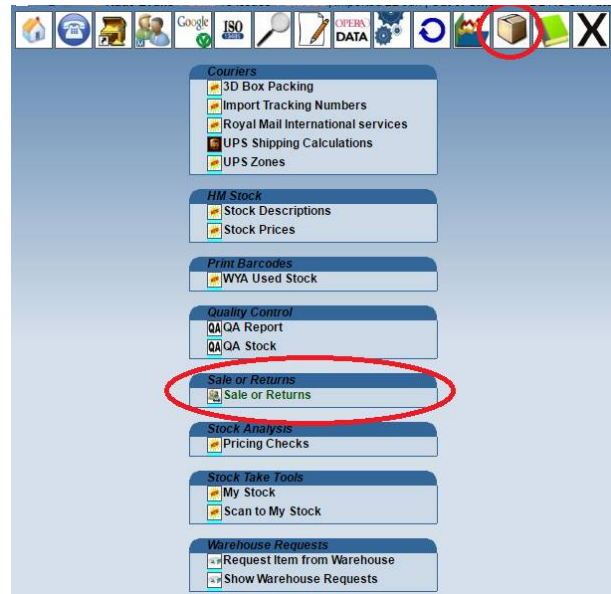


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email to the left.



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
88186	EDL83489	0014835	Pulse Oximetry Wrap Sensor
88288	Tracking1	0034993	Disposable SpO2 Sensor - Adult
88297	Tracking10	0034993	Disposable SpO2 Sensor - Adult
88298	Tracking11	0034993	Disposable SpO2 Sensor - Adult
88299	Tracking12	0034993	Disposable SpO2 Sensor - Adult
88300	Tracking13	0034993	Disposable SpO2 Sensor - Adult
88301	Tracking14	0034993	Disposable SpO2 Sensor - Adult
88397	Tracking3	3210070	Silicone Face Mask, Size 0
88423	Tracking29	3210070	Silicone Face Mask, Size 0
88424	Tracking30	3210070	Silicone Face Mask, Size 0
88425	Tracking31	3210070	Silicone Face Mask, Size 0
88436	80730145	4410500	Capnograph VM 2500-M
88552	Tracking154433_0	4420512	

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 ID34132
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

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

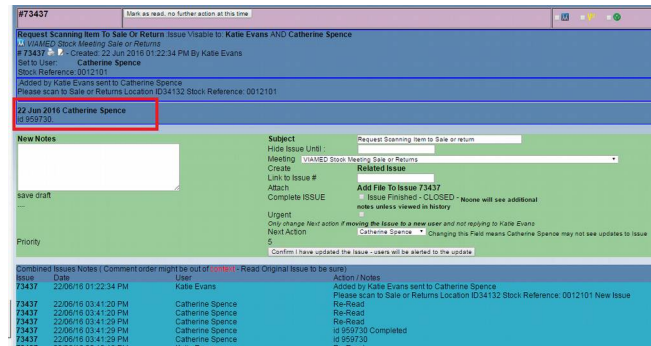
Note: if the item is urgent, also inform Goods Out verbally.

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.



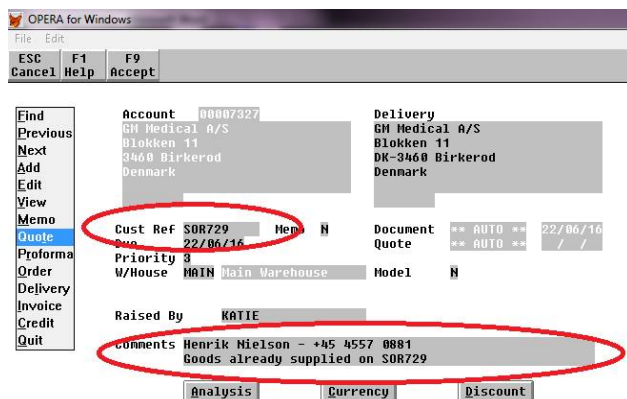
16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.

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



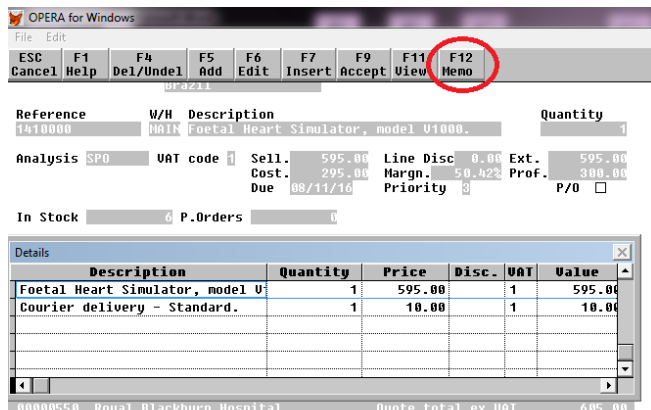
SOR	Account	Created	Name	Price
SOR628	00002360	01/Dec/2014	Airedale General Hospital	4.00
SOR682	00002360	03/Dec/2015	Airedale General Hospital	4.00
SOR642	00000490	23/Dec/2015	Birmingham Heartlands Hospital	4.00
SOR705	00007995	20/Mar/2016	Cotnam Medical (Euro)	4.00
SOR686	00001980	17/Jun/2016	Stoudeston Royal Hospital	4.00
SOR729	00007327	22/Jun/2016	BM Medical AS	4.00
SOR729	00007327	22/Jun/2016	Medivent Ltd (Euro)	4.00

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.



Description	Quantity	Price	Disc.	UAT	Value
Foetal Heart Simulator, model U1000.	1	595.00		1	595.00
Courier delivery - Standard.	1	10.00		1	10.00

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.

The screenshot shows the OPERA for Windows interface. A 'Transaction Notepad' window is open, displaying the serial number 'S/N: PR02194A10'. The background window shows a table with columns: Reference, W/H, Description, Quantity, Analysis, SP0, VAT code, Sell., 595.00, Line Disc, 0.00, Ext., 595.00. The 'Description' column contains 'Foetal Heart Simulator, model U1000.'.

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".

The screenshot shows the OPERA for Windows interface. The 'F9 Accept' button is highlighted with a red circle. The 'Transaction Notepad' window is still open, showing the serial number 'S/N: PR02194A10'.

The screenshot shows a 'Confirm' dialog box with the text 'Save Changes?'. The 'Yes' button is highlighted with a red circle.

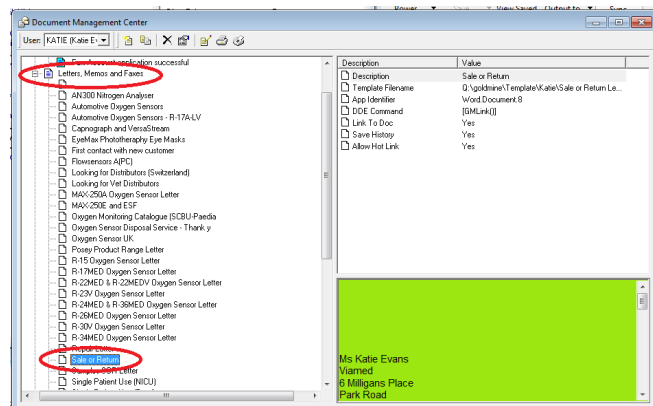
20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

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

The screenshot shows the GoldMine software interface. The 'Lookup' button is highlighted with a red circle. The 'Contact Search Center' window is open, displaying a list of contacts. The contact 'Henrik Nielsen' is highlighted in the list. The 'Write' button is also highlighted with a red circle.

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

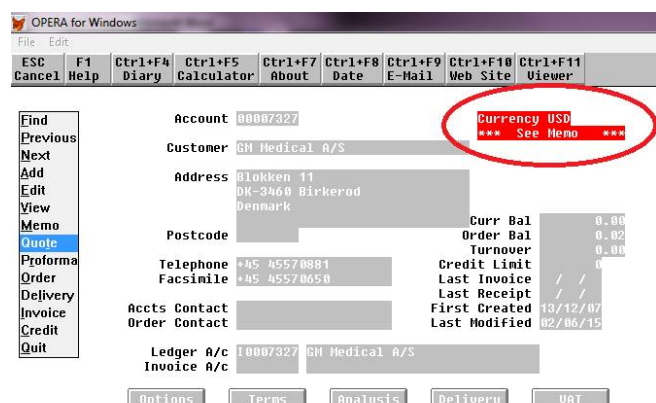
U

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.

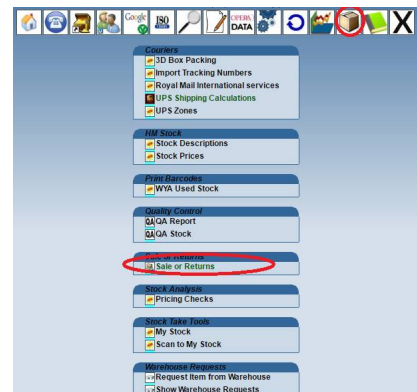
25. When complete, print one copy of this letter on letterhead and save to drive>current year>current month, with the following format:

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 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	Add	Shipping Notes	Send			
SOR628	00002360	01/Dec/2014	Airedale General Hospital						
SOR682	00002360	03/Dec/2015	Airedale General Hospital						
SOR642	00002490	23/Dec/2015	Emmingsham Heathlands Hospital						
SOR706	00007999	10/Mar/2016	Colchester Medical (Euro)						
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital						
SOR729	00007327	22/Jun/2016	GM Medical A/S						
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)						

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.

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

Company: GM Medical A/S
 Contact: Henrik Nielsen
 Department:
 Address: Topstykke 7
 Birkeroed
 Denmark
 PostCode: 3400

Barcode: 3210070 Silicone Face Mask, Size 0 Tracking3 (ID680397)
 3210070 Silicone Face Mask, Size 0 Tracking29 (ID680423)
 3210070 Silicone Face Mask, Size 0 Tracking31 (ID680424)
 3210070 Silicone Face Mask, Size 0 Tracking31 (ID680425)
 0014838 Pulse Oximetry Wrist Sensor EDL03489 (ID708186)
 0014760 SpO2 Silicone Sensor - Adult EDL00372 (ID711777)
 0012160 Pulse Oximeter VM 2101 T81000185 (ID642231)
 0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID686258)
 0034993 Disposable SpO2 Sensor - Adult Tracking10 (ID686297)
 0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID686298)
 0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID686299)
 0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID686300)
 0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID686301)
 0012101 Pulse Oximeter VM 2101 00800125 (ID69730)
 4200002 SpO2 Pulse Oximetry (ID69730)
 4300002 SpO2 Pulse Oximetry (ID69730)

Purpose of Device: The trial/testing to be undertaken by the authority (if any)

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

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

Company: GM Medical A/S
 Contact: Henrik Nielsen
 Department:
 Address: Topstykke 7
 Birkeroed
 Denmark
 PostCode: 3400

Barcode: 0012101 Pulse Oximeter VM 2101 00800125 (ID69730)
 Finger Pulse Oximeter
 Purpose of Device: The trial/testing to be undertaken by the authority (if any)
 Sale or Return trial to determine suitability prior to purchase

Current Items on sale Return id #729

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.

36. Save the PDF to U drive>Current year>Current month in the following format:

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

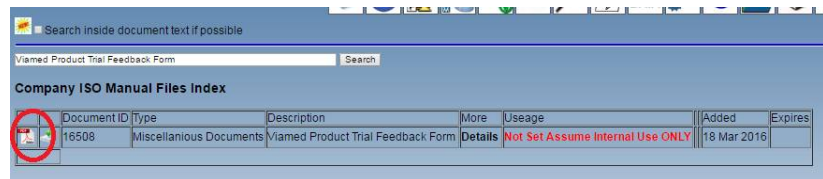
UK: "SOR Delivery Note - *Customer Name* - SOR*** - date backwards"

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`

39. Click on the PDF icon



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.

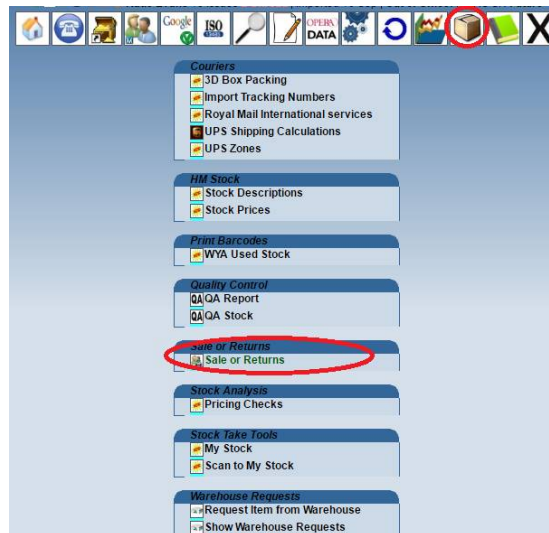
After Checking

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	Client	Date	Product	Delivery Note	Notes
SOR753	00001430	Dorset County Hospital	16/09/16	Show Delivery Note		I've chased this up
SOR754	00002020	Royal Surrey County Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR751	00005430	New Cross Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR745	00004470	Salisbury District Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR752	00002020	Royal Surrey County Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR750	00004470	Salisbury District Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR753	00004510	Southampton General Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR746	00004735	Southampton General Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR753	00001430	Dorset County Hospital	16/09/16	Show Delivery Note		I've chased this up
SOR752	00002020	Royal Surrey County Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR751	00005430	New Cross Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR750	00004470	Salisbury District Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR749	00004735	Southampton General Hospital	15/09/16	Show Delivery Note		I've chased this up
SOR748	000012969	Emergency Medical and Retrieval Transfer Service	13/09/16	Show Delivery Note	Steve Hardaker	I've chased this up
SOR747	00005130	Torbay Hospital	05/09/16	Show Delivery Note	Steve Hardaker	I've chased this up
SOR746	00007885	Jamjoom Medical Industries	05/09/16	Show Delivery Note	Ryan Swaine	I've chased this up
SOR745	00000550	Royal Blackburn Hospital	24/08/16	Show Delivery Note		I've chased this up
SOR743	00002824	Chelsea Westminster Hospital	09/08/16	Show Delivery Note	Katie Evans	02 Sep 2016 Katie Evans
SOR742	00007515	Merivaara AB	09/08/16	Show Delivery Note	Katie Evans	02 Sep 2016 Katie Evans
SOR741	00001900	Gloucestershire Royal Hospital	08/08/16	Show Delivery Note	Emily Hanson	01 Sep 2016 Emily Hanson
SOR739	00006304	Artisana Medical	27/07/16	Show Delivery Note	Emily Hanson	01 Sep 2016 Emily Hanson
SOR737	00003560	Manchester Royal Infirmary	13/07/16	Show Delivery Note	Steve Hardaker	01 Sep 2016 Katie Evans

6. 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.

XX	Production	Production Schedule		106
XX	CE Technical Files	CE Technical Files	1	29
XX	Feedback	Company Innovation		2
XX	Feedback	Customer Feedback Negative	6	157
XX	Feedback	Customer Feedback Positive		107
XX	Feedback	Product Feedback Negative	18	403
XX	Feedback	Product Feedback Positive		134
XX	Feedback	Product Innovation	1	3
XX	Feedback	Systems Innovation		2
XX	Feedback	VIAMED Feedback	1	182
XX	Product Catagories	Oxygen Hoodis		9
XX	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. Check the delivery address against the PO; it is not always known at the point of quotation but this must match the PO.

The screenshot shows the OPERA for Windows application. The 'Order' menu is highlighted with a red circle. Below the menu, the 'Account' is 00007327 and the 'Customer' is GH Medical A/S. The 'Currency' is USD. A table of documents is displayed with columns: Memo, Document, Doc Date, Type, Number, Date, Cust Ref., and Status. The first row shows a quote (DOC97323) dated 22/06/16, converted to an order (QU004278) dated 22/06/16, with a status of 'Printed'.

5. Amend the 'Cust Ref' box to the purchase order number and change the 'Due' date to the next available shipping day.

The screenshot shows the OPERA for Windows application. The 'Order' menu is highlighted with a red circle. Below the menu, the 'Account' is 00007327 and the 'Customer' is GH Medical A/S. The 'Delivery' address is GH Medical A/S, Blokken 11, DK-3460 Birkerød, Denmark. The 'Cust Ref' is SOR729 and the 'Due' date is 22/06/16. The 'Document' is DOC97323 and the 'Quote' is QU004278. The 'W/House' is MAIN Main Warehouse. The 'Raised By' is KATIE. The 'Comments' section contains the text: 'Henrik Nielson - +45 4557 0881 Goods already supplied on SOR729'.

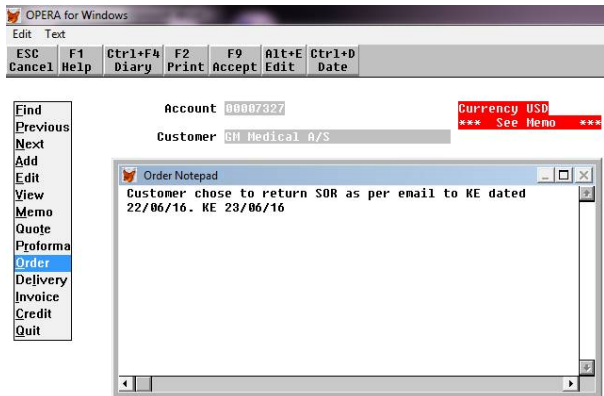
6. A note should have been added at the quote stage, in the 'Comments' section "Goods already supplied on SOR***". Ensure it is still there, if not, add this note.
7. Press F9 twice to complete the order.
8. Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR***". 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.

Note: If the customer chooses to add any additional items to the order, hand-write a note on both copies of the ORD to state which items need shipping and which only need to be invoiced. E.g. "1 x 0012160 and 1 x 0014750 already supplied on SOR***, please ship other items".

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.