

## **VM3COP20.31 - Viamed Export Order Processing Procedure**

### **We CANNOT sell any items to the following countries:**

Syria  
Iran  
Cuba  
North Korea  
South Sudan  
Myanmar

*Consult with the International Sales Manager if you receive any enquiries*

### **We CANNOT sell products from the USA (Teledyne, Maxtec, Posey, etc) to the following countries:**

Cuba  
Iran  
North Korea  
Sudan  
Syria  
Libya

*Consult with the International Sales Manager if you receive any enquiries*

USA – direct enquirer to the original manufacturer

### **Products we CAN sell to the USA:**

V1000 Foetal Heart Simulator

APGAR Timer – through our exclusive distributor, Bimeco group

### **Things to remember:**

Check if customer is a proforma or account customer

How are they paying? Do you need bank or PayPal charge?

PayPal charge is 6% of the proforma/order total

Bank charges are \$25 as standard – check Opera memos

Insurance is 1% of goods total

Correct Incoterms (EXW for customers own account, CIP/CPT for courier that we arrange on customers behalf, not including UPS)

EXW need customer courier account number and service required (where applicable) on ORD

If turning a proforma into an order, write box size on both ORD's

Check if any documentation is needed

UPS require a post/zip/area code for all orders

The contact on the ORD must be the contact's name, not the company name

Applicable Opera memos must be written on ORD

Orders most frequently arrive via email, but they may also be faxed; some customers also order over the telephone or upload directly to the website.

## Telephone Orders

**Telephone Order ID 5447**

Contact Name: Caroline Apin  
Contact Department:  
Contact Email: S00005130\_@fakemail.com  
Contact Telephone: 01803 655458

**Delivery Address**  
Torbay Hospital  
Stock Control - Medical Elec  
Laws Bridge  
Devon  
Torquay  
TQ2 7AA

**Invoice Address**  
Torbay & South Devon NHS  
Foundation Trust Accounts  
Payable Dept, Regent House  
Regent Close  
Torquay  
TQ2 7AN  
01803 653393

Order Notes:  
3X 0021013  
Order Number:  
1204291  
Credit Card Details:  
Card Type:  
Name On Card:  
Card No.  
Card Type:  
Issue Number:  
Security Number:  
Start Date:  
End Date:  
Registered House number  
Registered Post Code

A telephone order will appear as shown to the left. The delivery and invoices addresses are noted, as are the contact name, order number and product details. If you have taken the order yourself, this needs to be printed before processing. Please see VM3COP27.29 for details on how to take a telephone order.

## Fax Orders

PURCHASE ORDER

Order No: 1204291  
Order Date: 22/01/2012  
Order Time: 10:00:00  
Order Status: OPEN  
Order Type: FAX  
Order Source: FAX  
Order Reference: 1204291  
Order Description: FAX  
Order Notes: FAX

Customer: 1204291  
Customer Name: 1204291  
Customer Address: 1204291  
Customer Contact: 1204291  
Customer Email: 1204291  
Customer Phone: 1204291  
Customer Fax: 1204291  
Customer Mobile: 1204291  
Customer Email: 1204291  
Customer Phone: 1204291  
Customer Fax: 1204291  
Customer Mobile: 1204291

Line	Item	Qty	Unit	Price	Total	Order
1.000	1204291	1	EA	10.00	10.00	1204291
2.000	1204291	1	EA	10.00	10.00	1204291
3.000	1204291	1	EA	10.00	10.00	1204291

Total Order: 30.00  
VAT TOTAL: 3.00  
TOTAL: 33.00

Orders which arrive via fax will appear the same way as an email PDF order and should be processed normally. Please remember to acknowledge the order and advise of expected dispatch date by email if an email address has been supplied, or by fax if no email address is available on the purchase order or GoldMine/contact management.

## Uploaded Orders

Stock Details / Quantities

Search

Document Index

Find Next Available Order Account

PO, Update Log

Repair Codes

Repair Search

Search Issues

Serial Number

Telephone Orders

IP's / CRD Tracking Numbers

Planned Emails

Search Issues

Invoice / Customer Reference

Linked Delivery Addresses

Order Internal Document

Search Territory

Delivery Notifications

Invoices to be Emailed List

Office Jobs

Open/Advanced Ring, PDF

Uploaded Files

Website Questions

There are no notifications to advise you when an order has been uploaded via the website, so this must be checked daily. From the magnifying glass tab in Intrastats, click 'Uploaded Files'

You will be presented with this screen, completed orders will have a name in the 'Completed By' column, unprocessed orders need to be downloaded.

Uploaded Files ALL FILES download will need to be scan for viruses				
File ID Reference	Date Uploaded	Completed on	Completed By	Download
33224	22 Jun 2016	Click as Processed		Download
2	27 May 2016	27 May 2016	Derek Lamb	Download
1	26 May 2016	27 May 2016	Derek Lamb	Download

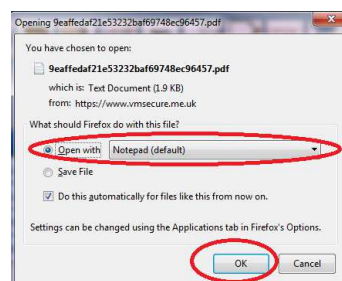
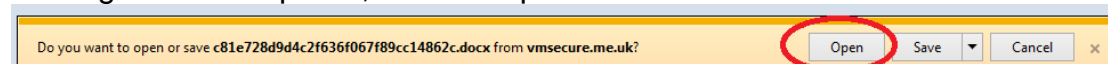
Click 'Download' on the unprocessed order line and the file will be downloaded to your computer. Click the newly downloaded file to open it.

Uploaded Files ALL FILES download will need to be scan for viruses				
File ID Reference	Date Uploaded	Completed on	Completed By	Download
33224	22 Jun 2016	Click as Processed		Download
2	27 May 2016	27 May 2016	Derek Lamb	Download
1	26 May 2016	27 May 2016	Derek Lamb	Download

9eaffedaf21e53232b...pdf

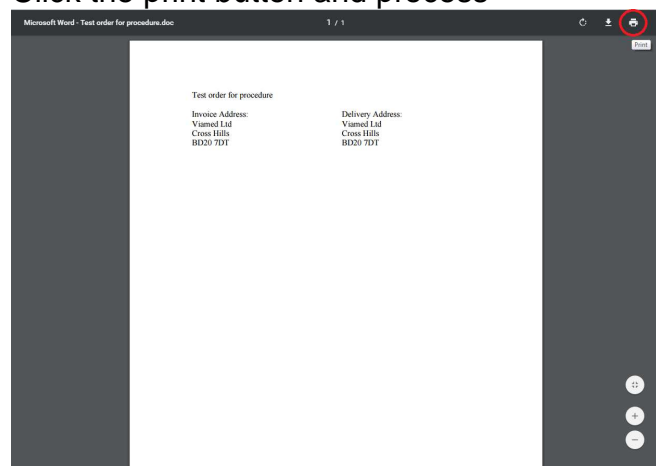
Show all downloads...

If using Internet Explorer, click on Open



If using Firefox, select the program you wish to open the document with and click open

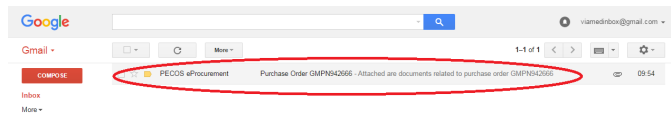
Click the print button and process



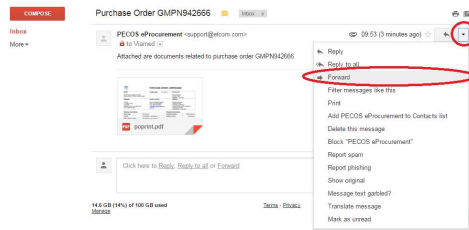
Click 'Click as Processed' and continue as below.

Uploaded Files ALL FILES download will need to be scan for viruses				
File ID Reference	Date Uploaded	Completed on	Completed By	Download
33225	22 Jun 2016	Click as Processed		Download
33224	22 Jun 2016	22 Jun 2016	Emily Hanson	Download
2	27 May 2016	27 May 2016	Derek Lamb	Download
1	26 May 2016	27 May 2016	Derek Lamb	Download

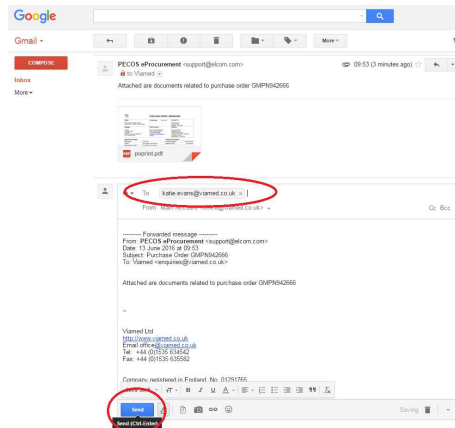
## Email Orders



When an order is seen in the main inbox, click on it to open it.

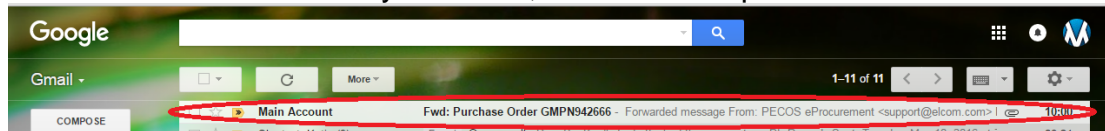


Click the arrow on the right and click forward.

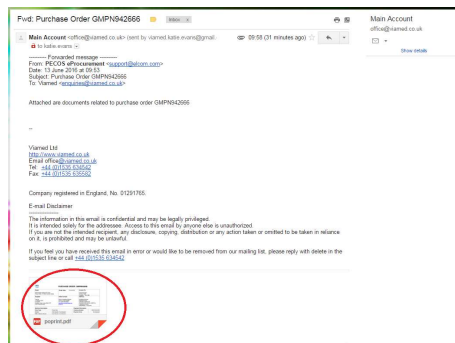


Type your email address in to the 'To:' field and click send.

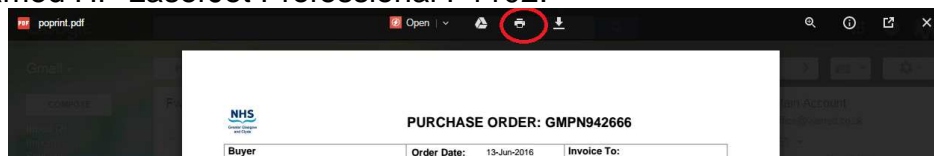
When the email arrives in your inbox, click on it to open it



Click on the attachment to open it.



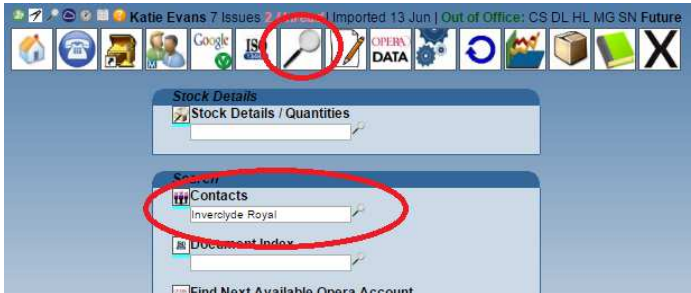
Click the print button at the top of the page and print to the printer located on your desk. Current printers are named HP LaserJet Professional P1102.





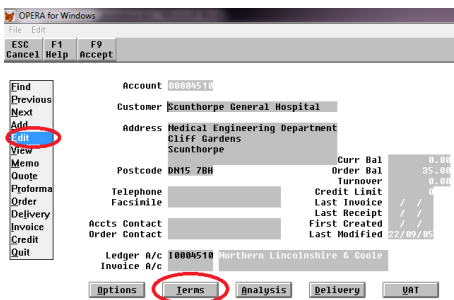
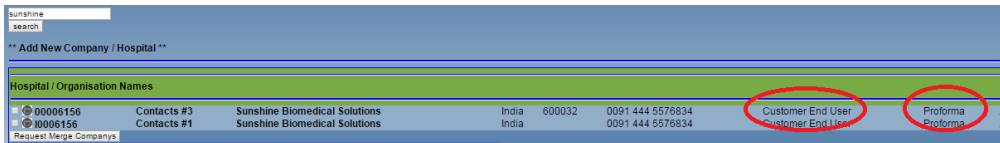
Export orders may often be just an email with an order request. Print the email and use the date and your initials as the 'Cust Ref' number. E.g. 16/06/16KE

## Order Processing

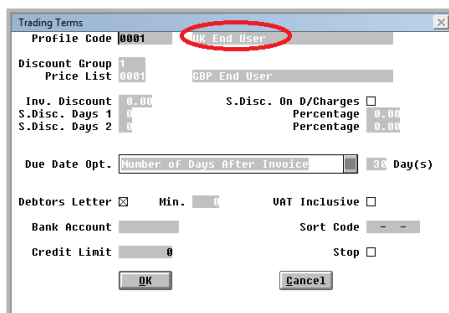


On Intrastats, click on the magnifying glass and enter the company/hospital name into the 'Contacts' box

Locate the correct account and look at the far right of the screen to see if they are an end user or a distributor, this also shows if the customer is a proforma or account customer. If the end column says 'Proforma, please stop here and proceed as per VM3COP27.31 Processing Proforma Invoices and Quotations.



To check the Opera account, locate account as above. Click 'Edit' and then click 'Terms'



In white text, next to the 'Profile Code' you will find the type of customer.

Press 'Cancel' then 'Esc' to continue.

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11

Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

**Find**

Account 00020009 \*\*\* See Memo \*\*\*

Customer R Bulworthy

Address

Postcode

Telephone 01295 768373

Facsimile 01295 768351

Accts Contact

Order Contact

Ledger A/c 00020009 R Bulworthy

Invoice A/c

Options Terms Analysis Delivery VAT

From Viamed Opera, click 'SOP' and then 'Processing'. Click 'Find' or press the F key.

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11

Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

**Find**

00007374 Medivent Ltd (Euro) Unit 10

00007375 Medivent Limited (Dollar) Unit 10

00007374 Medivent Ltd (Euro) Unit 10

00007375 Medivent Limited (Dollar) Unit 10

Previous

Select Customer

Address

Postcode

Telephone 00968 24814501

Facsimile 00968 24815201

Accts Contact

Order Contact

Ledger A/c 00007374 Medivent Ltd (Euro)

Invoice A/c

Options Terms Analysis Delivery VAT

Locate the delivery address for the company/hospital on the printed PDF email attachment and enter it into the search bar in Opera. Some companies have several accounts, in this case, check the address and currency and click on the correct one ensuring it is an account beginning with '0' e.g. 000\*\*\*\*. You must NOT place an order on an account beginning in 'I' as this is for accounting.

	Total Ex VAT	VAT	Total Incl VAT
Euro	794.40	0.00	794.40

Produced By Advanced Business Manager

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11

Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

**Find**

Account 00007883

Customer Oxylink (EURO)

Address

Postcode

Telephone 0048 483221752

Facsimile

Accts Contact

Order Contact

Ledger A/c 00007883 Oxylink (EURO)

Invoice A/c

Options Terms Analysis Delivery VAT

If there is a memo present, check this thoroughly first, ensuring you adhere to the requirements. If you are unsure of any of the memos, consult with office colleagues or the person who added the memo

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11

Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

**Find**

Account 00001955

Customer Inverclyde Royal Hospital

Address

Postcode PA16 0XN

Telephone

Facsimile

Accts Contact

Order Contact

Ledger A/c 00001955 NHS Greater Glasgow & Clyde

Invoice A/c

Options Terms Analysis Delivery VAT

Click on 'Invoice'

OPERA for Windows

File Edit

ESC F1 F2 F3 F4 F5 F6 F9 F11 F12 TAB More-->

Cancel Help Print Delete/Undelete New Edit Invoice View Memo

Find Previous Next ...

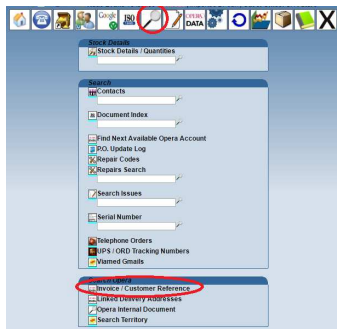
Account 00001955

Customer Inverclyde Royal Hospital

Invoice

Memo	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
	DOC93201	16/11/15	Invoice	IN141406	16/11/15	GHPN760836	Printed
	DOC93982	21/12/15	Invoice	IN142855	21/12/15	GHPN793798	Printed
	DOC94449	22/01/16	Invoice	IN142551	25/01/16	GHPN817491	Printed
	DOC95261	07/03/16	Quote	QU004129	07/03/16	07.03.16	Printed
	DOC95648	24/03/16	Ord	ORD79438	24/03/16	GPG873652	Printed
	DOC96132	21/04/16	Quote	QU004187	21/04/16	21/04/2016	Printed
	DOC96415	06/05/16	Invoice	IN144371	06/05/16	GHPN909529	Printed

Check the 'Cust Ref.' Column and check the last 6 months to ensure the purchase order number which is listed on the printed purchase order, has not already been entered.



If there are many accounts with the same company/hospital name, check for duplicated orders on IntraStats. From the magnifying glass, click the 'Invoice / Customer Reference' link

**Search Customer References**

Account	
Invoice Number	
Customer Reference	
Company / Hospital	
Value (£)	
Value (non £)	
Only Show outstanding	<input type="checkbox"/>
search	

Enter the PO number into the 'Customer Reference' field and click search. If the PO has already been entered, a result will be found, do not proceed to process the order. Instead, locate the order which is already on the system and compare the lines to ensure it is the same order.

Choose

Display Invoice ?

Status Header Lines Totals

From the same 'Invoice' screen, click on any of the orders and press F11, then click on 'Header' in order to view the invoice address. If this address is correct, proceed. If the address is incorrect, check to see if there is another account for the same company/hospital with a different invoice address. If the correct account still cannot be found, check with the accounts department or email the customer to see if this is a permanent change.

Some purchase orders do not specifically mention a delivery or invoice address, and some orders are just an email with no purchase order attached. In this case, while the header of previous orders is open, check the previously used addresses, if the addresses differ for the last 6 months, email the customer and confirm the address.

OPERA for Windows

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11

Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

Find Previous Next Add Edit View Memo Quote Order

Account 00001955

Customer Inverclyde Royal Hospital

Address Central Stores  
Larkfield Road  
Greenock

Postcode PA16 0HL

Telephone

Facsimile

Accts Contact

Order Contact

Ledger A/c 00001955 NHS Greater Glasgow & Clyde

Invoice A/c

Options Terms Analysis Deliverys DNT

Press the Esc key to exit the invoice view and click 'Order'; this will display any outstanding orders, quotes and proformas.

Click the 'F5 New' button or hit F5 on the keyboard. You may be presented with the printer dialogue box. From the drop-down menu, select the printer named in the image, 'HP SN M1212nf' and click 'Printer'.

You will be presented with this dialog box

Click 'OK' or hit enter to proceed.

You will be presented with warehouse options, always choose 'MAIN \* Main Warehouse'

Here is where we enter the address details from the purchase order. To start, check the invoice address in the left-hand box matches the invoice address listed on the received purchase order.

The delivery address in the right-hand box may display an incorrect department; if so, amend it to match the purchase order. A company name, street, town/city and postcode/zip code are required for all orders. All export orders must also have a country noted on the delivery address.

In the 'Cust Ref' box, enter the purchase order number from the purchase order.

If the purchase order number has more than 10 characters, the 'Cust Ref' box must contain '#xxxxxxxx' using the last 9 digits of the purchase order number. If no purchase order or purchase order number has been supplied, use the date and your initials, e.g. "17/05/17KE"

This does not apply to eBay and Amazon orders, follow the steps on VM3COP20.16 (Doc ID: 15530) for eBay and VM3COP20.23 (Doc ID: 16191) for Amazon.

If the customer would like to use their own courier, enter the 'Priority' as '2' and enter the 'Due' date as per cut-off times listed on the Customer Postage Pricing document VM3COP03.011. Export orders are shipped via UPS (priority 3) unless advised otherwise by the customer.



Priority 1 – Urgent order to be processed immediately (only to be used when the order has been confirmed as urgent)

Priority 2 – Courier other than UPS or Royal Mail

Priority 3 – UPS – all services

Priority 4 – Royal Mail – all services

In the 'Comments' box, enter the name and telephone number (including any extension) of the contact listed on the purchase order. If a contact name or phone number is not listed, check the CRM on IntraStats or GoldMine for the details. ALL export orders must have a contact name, the company name or a department name cannot be used.

When you are confident that all of these details are correct, press 'F9' to continue to the next page. If the purchase order number had more than 10 characters, beneath the name and telephone number, state the full purchase order number beginning with '#', eg. '#xxxxxxxxxxxxxx'.

If no purchase order number has been provided, enter the date in the 'Cust Ref' box. Eg. '16/06/16'. If the customer is paying via PayPal or credit/debit card, use PP followed by the date. Eg, 'PP16/06/16' if payment is made via PayPal or 'CC16/06/16' for credit or debit card. If paying by credit/debit card, add a note beneath the name/phone number stating 'Payment received with thanks'.

**NEVER accept a credit or debit card for export orders unless instructed to do so by the accounts department. Please note, we cannot accept American Express cards under any circumstances.**

Return to the magnifying glass/ 'Lookup' on IntraStats and search for the part number in the 'Stock Details / Quantities' field and hit enter.

Ref	Stock Reference	Opera Description	Search	UK End User
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00
2520000	Microsoft DB3 - Patient Lead	Microsoft DB3 - Patient Lead	2520000	£115.00

Click on the '£' button to display all of the prices. Locate the price for the correct currency and customer type (end user/distributor)

If the prices match the purchase order, proceed to Opera to enter the details.

Check these details for all products listed on the purchase order.

If the prices on the purchase order are incorrect, return to the first screen and change the priority to '8', contact the customer before proceeding. Contact the customer by email and print the sent email. Make a note on the paper copy of the purchase order of any contact you have had with the customer and their response. Fill in as many of the order details as possible, including all parts but insert correct pricing, print one copy of the ORD and place in tray 7 in the office labelled, 'Tray 7 – Sales Orders - Awaiting Action'.

When the customer answers the queries and the order can proceed, collect order from tray 7 and proceed, ensuring any applicable notes are written on the original order paperwork and any relevant emails are printed and attached.

When you are satisfied that all the prices are correct or have been accepted by the customer, return to Opera.

Enter the part number in the 'Reference' box.

Hit the down arrow or the tab key on the keyboard, this should fill in the description as per the purchase order. If a dialog box appears, read the notes to ensure nothing is missed and press Esc to proceed.

Enter the quantity noted on the purchase order in the 'Quantity' box and press F9.

Ensure the pricing and quantity is correct before proceeding.

When all items on the purchase order have been entered, bank/PayPal charges, insurance and carriage must be added.

## Bank Charges and Insurance

If the customer is paying in USD's the standard bank charge is \$25 unless the memo states otherwise. Customers paying with EUR's do not receive a bank charge.

The screenshot shows the OPERA for Windows interface. The 'Reference' box contains 'W/H' and the 'Description' box contains 'Bank Charges'. The 'Quantity' box is set to 1. The 'Analysis' box is set to 'CC'. The 'VAT code' is empty. The 'Sell' box is set to 21.85. The 'Line Disc' is 0.00. The 'Ext.' is 21.85. The 'Cost' is 0.00. The 'Margin' is 100.00%. The 'Prof.' is 10.00%. The 'Due' date is 04/02/10. The 'Priority' is 3. The 'P/O' is empty. The 'In Stock' box is checked. The 'P.Orders' box is empty. The 'Details' table shows the following data:

Description	Quantity	USD Price	Disc.	VAT	USD Value
Oxygen sensor, MAX-25 BE	5	69.00	E		345.00
PayPal Charges	1	21.85	E		21.85
International signed	1	19.37	E		19.37

Use the 'Reference' BC, the description will automatically change to 'Bank Charges'. If the customer is paying with PayPal, amend the description to, 'PayPal Charge' see page 14 to calculate PayPal charge. Enter the 'Quantity' as 1 and add the appropriate charge to the 'Sell' box. Then hit F9 to proceed.

The screenshot shows the OPERA for Windows interface. The 'Reference' box contains 'INS' and the 'Description' box contains 'Insurance'. The 'Quantity' box is set to 1. The 'Analysis' box is set to 'CC'. The 'VAT code' is empty. The 'Sell' box is set to 15.10. The 'Line Disc' is 0.00. The 'Ext.' is 15.10. The 'Cost' is 0.00. The 'Margin' is 100.00%. The 'Prof.' is 10.00%. The 'Due' date is 16/06/16. The 'Priority' is 3. The 'P/O' is empty. The 'In Stock' box is checked. The 'P.Orders' box is empty. The 'Details' table shows the following data:

Description	Quantity	USD Price	Disc.	VAT	USD Value
Oxygen sensor, T-1	10	37.75	E		377.50
Oxygen sensor, R-36MFD	30	37.75	E		1132.50
Insurance	1	15.10	E		15.10
Courier delivery - Standard.	1	24.89	E		24.89
Courier delivery - Standard.	1		E		

Next, enter the insurance. Unless advised otherwise by the memo, all customers require insurance. In the 'Reference' box, type 'INS', the description will automatically change to 'Insurance', enter the 'Quantity' as 1 and amend the 'Sell' box to 1% of the total goods value. E.g. if the customer orders \$600 or €600 of products, the insurance charge would be \$/€6.

## Carriage

The screenshot shows the OPERA for Windows interface. The 'Reference' box contains 'PPH0' and the 'Description' box contains 'Delivery - Royal Mail 1st Class Recorded'. The 'Quantity' box is set to 1. The 'Analysis' box is set to 'PP'. The 'VAT code' is empty. The 'Sell' box is set to 5.00. The 'Line Disc' is 0.00. The 'Ext.' is 5.00. The 'Cost' is 0.00. The 'Margin' is 0.00%. The 'Prof.' is 0.00%. The 'Due' date is 13/06/16. The 'Priority' is 3. The 'P/O' is empty. The 'In Stock' box is checked. The 'P.Orders' box is empty. The 'Details' table shows the following data:

Description	Quantity	USD Price	Disc.	VAT	USD Value
Delivery - Royal Mail 1st Class Recorded	1	5.00	E		5.00

All export orders are shipped via UPS unless advised otherwise by the memo. For customers with a credit account, enter the 'Reference' as 'PPUPS6' for delivery addresses in the EU or 'PPUPS7' for delivery addresses outside of the EU. Enter the quantity as 1 and leave the 'Sell' box empty and press F9 to complete the line. PPUPS6 refers to UPS Standard service which is not always available outside of the EU, check Opera Memo and previous orders for correct UPS service.

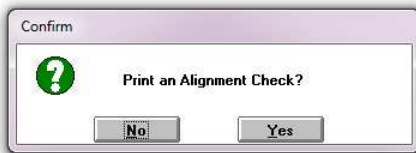
ENSURE you hand-write a note on both copies of the ORD to say, 'Carriage to be added'. You must initial and date any hand-written notes.

If a customer requires shipping via Royal Mail, add insurance to the order but advise the customer that it can only be tracked while in the UK. There is a 2kg limit to this service. Ask Goods Out for the service and price and check if the price given includes the 10% Viamed surcharge. If not, add 10% to the price given and add this price to the sell box on the carriage line. See VM3COP20.36 for sending goods via Royal Mail

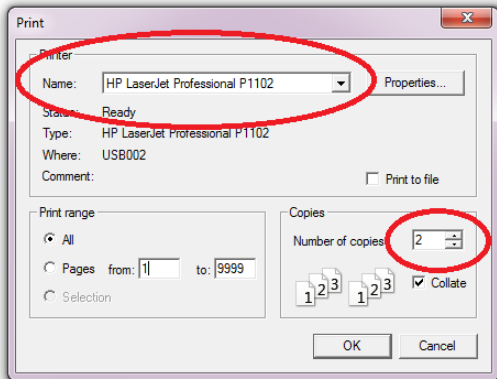
When you have all of the products, appropriate bank and insurance charges and one carriage line entered into Opera, press 'F9 Accept' to complete the order.

The screenshot shows a 'Choose' dialog box with a question mark icon. The text inside the dialog box says 'Update Document - Value 60.00 ?'. There are two buttons: 'Yes' and 'No'.

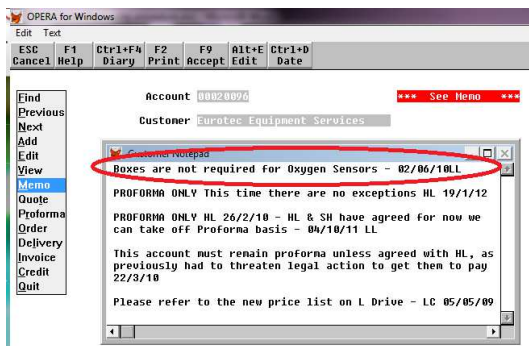
This message will be displayed, click 'Yes' to confirm the order is correct.



When this message is displayed, click 'No' as an Alignment Check is not needed at this point.



The print dialog will display, choose the correct printer from the drop down box and select 2 for the 'Number of copies'. 2 copies are needed, one is kept with the purchase order after checking and the other is taken to Goods Out after checking has been completed.



If the memo or purchase order state any specific requirements that Goods Out need to know, such as the customer needs their own labels adding to sensors, hand-write a note on both copies of the ORD.

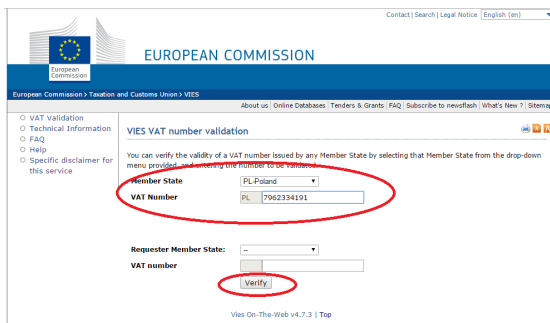
Secure the purchase order, both copies of the ORD and any correspondence together with a paperclip and place in tray 4, 'Tray 4 – Sales Orders – Checking'

Acknowledge the order and advise customer of lead time.

If an order is over \$/€10,000, this must be signed off by a director.

## V.A.T.

If you are entering an order for a new customer from an EU country, you MUST acquire a V.A.T. number from the customer in order to remove V.A.T charge. Place the order on Opera but ensure the priority is stated as '8' until the V.A.T. number is received. Once received, navigate to [http://ec.europa.eu/taxation\\_customs/vies/vieshome.do](http://ec.europa.eu/taxation_customs/vies/vieshome.do) on your browser.



In the 'Member State' box, click on the appropriate country, using the first two characters of the V.A.T. number to guide you. Click 'Verify'.

EUROPEAN COMMISSION

VIES VAT number validation

**Yes, valid VAT number**

Member State: PL  
 VAT Number: PL7962334191  
 Date when request received: 2016/06/17 18:11:59  
 Name: PIOTR PODKOWA  
 Address: GROSZOWICE 343  
 26-630 JEDLINA-LETNISKO  
 Consultation Number: [blank]

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If the V.A.T. number is correct, this message will be displayed. Print this and keep with the customer purchase order.

EUROPEAN COMMISSION

VIES VAT number validation

**No, invalid VAT number (please refer to FAQ, questions 7, 11, 12, 13 and 20 for more information).**

Member State: PL  
 VAT Number: PL541643121  
 Date when request received: 2016/06/17 18:13:06  
 Name: [blank]  
 Address: [blank]  
 Consultation Number: [blank]

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If the V.A.T. number is incorrect, you will receive this message. Send a copy of this to the customer and advise them that their VAT number is incorrect. Ask them for the correct version, if a valid V.A.T. number cannot be provided, ensure V.A.T. is charged.

OPERA for Windows

File Edit

ESC F1 F9 Cancel Help Accept

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

Account: 00007883 Currency: EUR \*\*\* See Memo \*\*\*

Customer: Oxylink (EUR0)

Address: Groszowice 343  
 26-630 Jedlnia-Letnisko  
 Woj Mazowieckie  
 Poland

Postcode: [blank] Curr Bal: 0.00  
 Order Bal: 7044.49  
 Turnover: 0.00

Telephone: 0048 483221752 Credit Limit: [blank]  
 Last Invoice: [blank]  
 Last Receipt: [blank]  
 First Created: 02/09/12  
 Last Modified: 09/06/16

Accts Contact: [blank]  
 Order Contact: [blank]

Ledger A/c: 00007883 Oxylink (EUR0)  
 Invoice A/c: [blank]

Options Terms Analysis Delivery **VAT**

If the V.A.T. number is correct, it must be entered into the 0 and I account in Opera. To do this, locate the customer's ordering and invoice account, e.g. 00007883 and I0007883. Click 'Edit' then click 'V.A.T.'

OPERA for Windows

File Edit

ESC F1 F9 Cancel Help Accept

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

Account: 00007883 Currency: EUR \*\*\* See Memo \*\*\*

Customer: Oxylink (EUR0)

Address: Groszowice 343  
 26-630 Jedlnia-Letnisko  
 Woj Mazowieckie  
 Poland

Postcode: [blank] Curr Bal: 0.00  
 Order Bal: 7044.49  
 Turnover: 0.00

Telephone: 0048 483221752 Credit Limit: [blank]  
 Last Invoice: [blank]  
 Last Receipt: [blank]  
 First Created: 02/09/12  
 Last Modified: 09/06/16

Accts Contact: [blank]  
 Order Contact: [blank]

Ledger A/c: 00007883 Oxylink (EUR0)  
 Invoice A/c: [blank]

VAT Registration Number: PL7962334191

OK Cancel

Enter the customer's full V.A.T. number including the first two letters to identify the country.

OPERA for Windows

File Edit

ESC F1 F11 F12 Cancel Help Stock Memo

Reference: 0520007 W/H Description: Microstin DB3 - Patient Lead. Quantity: 3

Analysis: UN VAT cod: E Sell: 15.00 Line Disc: 0.00 Ext: 45.00  
 Cost: 2.85 Margin: 81.00 Prof: 36.45  
 Due: 13/06/16 Priority: 3 P/O: [blank]

Due order: [blank]  
 In Stock: 1160 P.Orders: 0 Disc: [blank] P/Ords: [blank]

Details

Description	Quantity	Price	Disc.	VAT	Value
Microstin DB3 - Patient Lead.	3	15.00		1	45.00
Delivery - Royal Mail 1st Class	1	5.00		1	5.00

00000002 Oxylink Ltd (UK) Order total ex VAT: 50.00

Ensure the V.A.T. is removed from all lines by editing each line and ensuring the 'VAT code' box states 'E'.

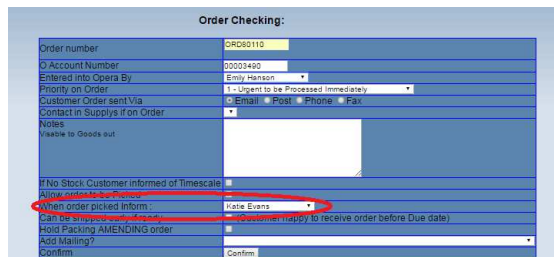
If the customer cannot provide a V.A.T. number, change the 'V.A.T. code' box from 'E' to '1'.

## Editing an Order

If an order needs editing, for example if the priority needs to be changed. Click 'Find' on Opera and navigate to the correct account, click 'Order' and click on the order you wish to edit and press F6. Change the priority or date as required.

If an order line needs to be edited, continue to the next page, click on the line required and click F6, edit as appropriate and press F9, press F9 again to complete the order. After editing any details, print 2 copies out again and place in the checking tray with original paperwork to be re-checked, as Goods Out will need a new copy of the ORD.

## Priority 1



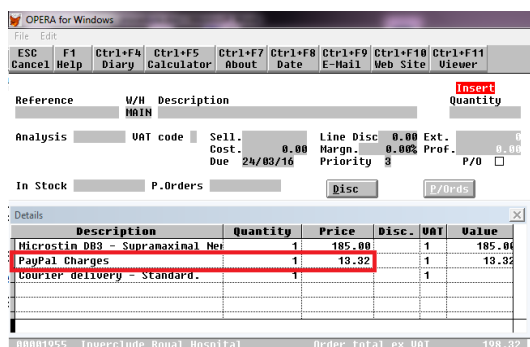
If the purchase order states that the order is urgent, set the priority as '1'. Ask a director to sign both copies of the ORD and hand the order to an office staff member for checking, ensuring they amend the box stating, 'When order picked inform:' to \*Your name\*.

Once checked, inform Goods Out that there is a priority 1 order coming over and ask them to carry out a mini update. Place one copy of the ORD in the hand of a Goods Out staff member.

## Discounts

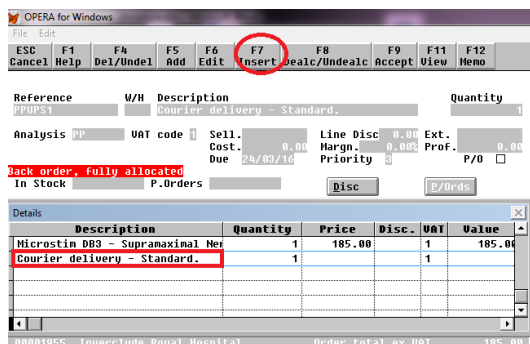
If any order has a discount applied or has any free of charge items/carriage (lines which would normally be chargeable), ask a director to sign both copies of the ORD before the checking stage.

## PayPal



On occasion, a customer may wish to pay via PayPal. Should this occur, add a line above the carriage line. Use reference 'PAYPAL', and calculate 6% of the total cost of the order including V.A.T. (excluding this PayPal charge). Add this calculated charge to the 'Sell' box.

E.g. Products, any applicable bank charges, insurance and carriage totalling \$792 The PayPal charge would be 6% of the total, therefore the PayPal charge in this example is \$47.52.



If a line needs to be inserted to accommodate the PayPal charge, select the line that you would like the new line to appear above and press F7, type the reference number as described above and press F9 to confirm, then press Esc.

Using 'Insert' will always add the new line above the selected line.



## Western Union Payments

The screenshot shows the OPERA for Windows application. At the top, there is a menu bar with options like File, Edit, and a toolbar with function keys (F1, F2, etc.). Below this is a form with fields for Reference, W/H, Description, and VAT. The VAT field is set to 'MAIN'. There are also fields for Analysis, VAT code, Sell, Line Disc, 0.00 Ext., Cost, 0.00, Margn, 0.00%, Prof, 0.00, Due 24/03/16, Priority 3, and P/O. Below the form is a table with columns: Description, Quantity, Price, Disc., VAT, and Value. The table contains three rows: 'Microstin DB3 - Supranaxinal Net' with Quantity 1, Price 185.00, VAT 1, and Value 185.00; 'PayPal Charges' with Quantity 1, Price 13.32, VAT 1, and Value 13.32; and 'Courier delivery - Standard' with Quantity 1, Price, Disc., VAT, and Value all blank. At the bottom, there is a status bar showing '00001955 Inverclyde Royal Hospital Order total ex VAT 198.32'.

Description	Quantity	Price	Disc.	VAT	Value
Microstin DB3 - Supranaxinal Net	1	185.00		1	185.00
PayPal Charges	1	13.32		1	13.32
Courier delivery - Standard	1				

On occasion, a customer may wish to pay via Western Union. Should this occur, add a line above the carriage line. Use reference 'BC', amend the description to 'Western Union Charge'. The charge is £15, exchange to the correct currency and add the correct value to the 'Sell' box.

If a line needs to be inserted to accommodate the Western Union charge, select the line that you would like the new line to appear above and press F7, type the

reference number as described above and press F9 to confirm, then press Esc. Using 'Insert' will always add the new line above the selected line.

If no PO number is used when a customer chooses to pay via Western Union, the customer reference should be WU followed by the date, e.g. 'WUDD/MM/YY'

**Note:** The customer will need the full name (including any middle names) of the person who collects the payment; this would normally be Helen. Helen's full name is Helen Jean Lamb, please ensure the customer uses this when making their payment.

## Additional Notes

For orders that are solely for calendars or posters, hand write a note on the ORD's stating to ship with next order.