

VOP			
Operating Sub Process			
<u>Enquiries/Orders/Contract Review</u>			
Created:	27/03/06	VOP 03	Issue 1
Revised:	27 October 2017	Viamed Ltd ISO13485:2016: 5.2 ,5.2 ,7.2.3 ,7.2.1 ,7.2.2 VST Ltd ISO9001:2015: 8.2.3.1 , 5.1.2 ,8.2.2 ,8.2.4 ,8.2.1	Page 1 of 4

SCOPE

This procedure is established to describe the system used within the company for the Control of Contract Review, Enquiries and Orders. It is used in conjunction with the individual sub procedures, which show the relevant information necessary. The purpose of this procedure is to describe the system in use at the company for the orders, review and processing of all Sales.

RESPONSIBILITIES

It is the responsibility of the Managing Director, to ensure that the contents of this procedure, and related procedures, are adhered to.

CUSTOMER ENQUIRIES

Telephone Enquiries

If the telephone, email or fax is used Viamed must assume the enquiry is urgent and any unnecessary delays could prejudice our existing goodwill and future business.

Record in Intrastats: Name, Department, Hospital, Companies Name, Company Address, Email, Telephone and Contact Details.

Technical Enquiry

If the enquiry is simple, give the answer – Use Intrastats the majority of the time, also accounts package, leaflets and data sheets. Where the enquiry is not readily answerable obtain the equipment type, serial number and the general details of problem. Record the details in Intrastats and then pass the query to an engineer or director.

If they are not available or no answer can be given take the contact details, telephone number, email address, name, department, company / hospital Equipment, serial number, warranty, description of fault. Then create an Intrastat Issue to the relevant engineer or director.

Possible equipment failure, do a warranty check using the stock book in Intrastats, check the serial number and part number. If goods are to be returned generate a SRS (Service Returns Sheet) so the customer can quote this on the return. Fill in as many details about the customer and the return as possible. Tell the customer we will raise a chargeable order to be sent with the replacement item(s), quoting the SRS and SRN numbers on it and on receipt of their item/s it will be booked in and tested. A request for credit will be raised and sent to the customer. This ensures that goods are returned to us for review. For larger items a site visit can be arranged.

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Price Enquiries

Obtain prices from Intrastats, this includes quantity discounts prices and carriage. Information can also be found on Opera or current price lists. Intrastats will be the most accurate for regularly supplied items.

Delivery Enquiries

Check the order number, outstanding orders and estimated delivery dates. Exercise caution when giving out delivery dates. Where delays are involved contact supplier for current status.

Product Information Enquiries

For simple products, consult Intrastats, leaflets and data sheets. For complex products pass to relevant person.

Trials and Demonstration

Depending on location offer to send in a sales person, time and place to be arranged by the sales person, Issue in intrastats to relevant person. Enter details into Intrastats CRM. If an urgent trial is required (or in an awkward area i.e. John O Groats) and the equipment will go via post offer to send the item, preferably the same day depending current stock levels.

Inform the sales person responsible. Fill in the Intrastats Sale or Returns / Issue so goods can be chased up. These must be sent to a named individual. Must be for 14 days only without permission of Directors.

Email, Letter and Fax Enquiries

Forward the email on to the relevant person/s, if you are unsure they can be cc'ed to more than one person. If unsure ask.

Give letters to the addressee or person most suitable.

Faxes should be give to the addressee or person most suitable. If a payment notification this should be copied and then passed to accounts, the copy is attached to the customer order.

QUOTATIONS

Verbal quotations can be given over the phone and written quotations can be prepared by any member of staff, authorisation will be by a director and is required for quotes above a stipulated level set by financial director. This is currently £10000.00. Quotes are filed in the Quotes File. Intrastats CRM should be filled in or the stock item ticked.

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CONTRACT REVIEW

After an order has been put on the system it is checked, stamped On System, initialled and dated. The office staff then the put order put onto the accounts package and order ORD printed. These are then checked initialled and dated by Another member of staff.

Picking is carried out by warehouse staff via Intrastats they raise the invoice/dispatch documentation.

ORDERS

Telephone orders

All telephone orders must be recorded in Intrastats. At the time of recording the order, the office staff must check item codes and descriptions against manufacturers specifications and stock levels. The callers full name, address, email, telephone and order number are recorded and the customer is asked to confirm the order to us. The order is then stamped, initialled and dated. Any further contact is to be noted and information added to Intrastats. The orders are checked by another member of staff then a copy sent to goods out and the original filed in ORD number order, for easy retrieval.

Written, emailed or faxed orders

The office staff must check item codes and descriptions against manufacturers specifications and stock levels. The customers full name, address, email, telephone and order number are recorded. The order is then stamped, initialled and dated. Any further contact is to be noted and information added to Intrastats. The orders are checked by another member of staff, then a copy sent to goods out and the original filed in ORD number order, for easy retrieval.

Internet Orders, Ebay and Paypal

Enter order into accounts package and order printed signed and checked by another member of staff, as above. Use the Paypal reference as the order number. Fill in Intrastats.

If the order is a confirmation

Check if the Order has already been processed on Opera.

If the Order is not a Confirmation

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Check the quantity and which goods are required. Any queries on the order, contact the relevant department and note the conversation on the order and Intrastats, details are fully filled in and details logged.

Confirmation Email confirming the order are sent to export customers, orders received by email and others that confirmation has been requested. Delivery notifications are also sent.

Customers ordering non -standard or none part number specific items which are not covered by ISO9001 suppliers should be informed and give permission before order is accepted.

ORDER AMENDMENTS

Where an order is amended prior to picking the ongoing order will be endorsed with the amendment details, the full name of the contact, telephone number, date and the signature of the person taking the amendment. The notes on the active list are added / updated. So goods out informed.

All order amendment details should be entered into intrastats, customers full name and address to be checked. If Possible ask the customer to confirm the amendments via E-Mail.

If the amendment is after dispatch, a separate order will be raised and the customer will be invoiced separately and, where appropriate, a Credit Note issued for unwanted items on the original order upon return of the goods.

When updating accounts package or converting a quote / and or proforma the 'Rasied by' field needs to be updated with the initials of the current user.