VM3COP29.13 – Returns – Repair Admin

Related documents:

VM3COP29.09 – Goods In - Booking In Returns and Repairs
VM3COP20.031 – Office – Processing Repairs
VM3COP29.03 – Goods Out - Shipping

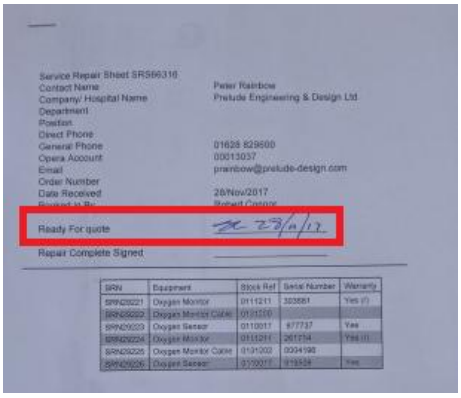
Engineers evaluation

After the engineers have evaluated the goods on an SRS, they will move the ducket containing the goods and the paperwork to the repair shelves, these are located on the Goods In corridor, at the bottom near the R&D room door.

The ‘To Be Quoted’ shelf and the ‘Waiting Letter/Repair Sheet’ should be checked daily.

To be quoted shelf

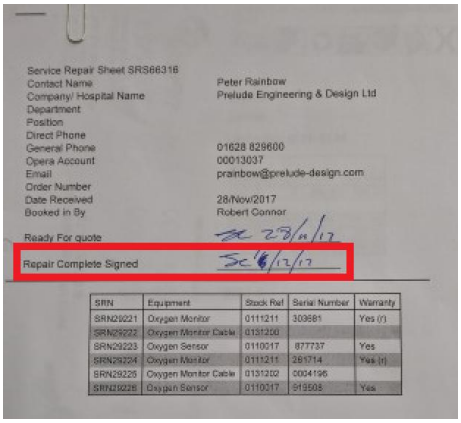
When a repair is located on the ‘To Be Quoted’ shelf, locate the SRS sheet and sign as ‘Ready for Quote’. Deliver the SRS sheet and any customer paperwork to the office; they will then return a finished quotation for checking.



When the paperwork has been taken to the office, move the ducket to the ‘Quoted – Waiting on Customer’ shelf.

Waiting Letter/Repair Sheet shelf

When a repair is located on the ‘Waiting Letter/Repair Sheet’ shelf, gather the SRS sheet and customer paperwork and sign as ‘Repair Complete Signed’. Deliver the SRS sheet and any customer paperwork to the office; they will then return a finished order and completion paperwork for checking.

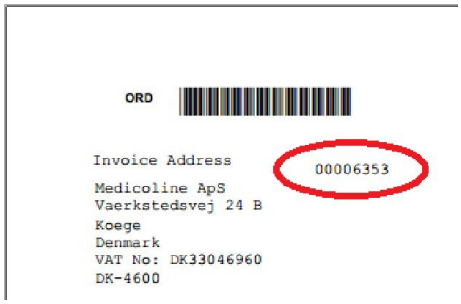


<u>Checking quotations and orders</u>

When the office has generated the quotation or order, it will be placed in the ‘REPAIR ORDERS/QUOTES TO CHECK’ tray located in Goods Out. All of the paperwork for each SRS will be paper clipped together.

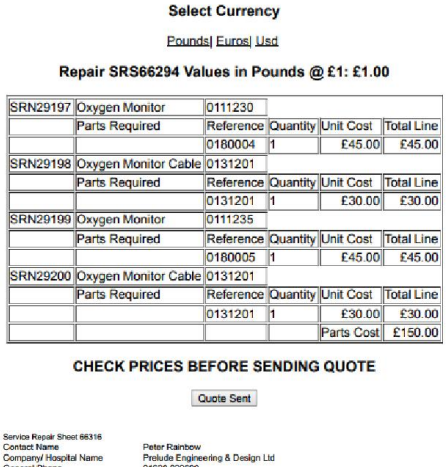
Collect an order or quotation from the tray.

Locate the account number on the ORD and locate the account on Opera.



Click on ‘Memo’, read the memos and ensure that the QUO/ORD meets any noted requirements.

For quotations, take the QUO, the customer paperwork and the quotation details (see right).



Select Currency

Pounds| Euros| Usd

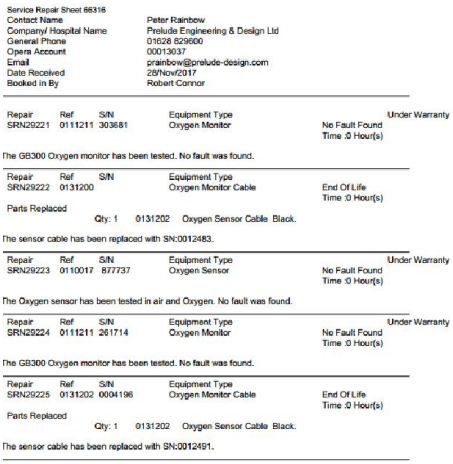
Repair SRS66294 Values in Pounds @ £1: £1.00

SRN29197	Oxygen Monitor	0111230			
	Parts Required	Reference	Quantity	Unit Cost	Total Line
		0180004	1	£45.00	£45.00
SRN29198	Oxygen Monitor Cable	0131201			
	Parts Required	Reference	Quantity	Unit Cost	Total Line
		0131201	1	£30.00	£30.00
SRN29199	Oxygen Monitor	0111235			
	Parts Required	Reference	Quantity	Unit Cost	Total Line
		0180005	1	£45.00	£45.00
SRN29200	Oxygen Monitor Cable	0131201			
	Parts Required	Reference	Quantity	Unit Cost	Total Line
		0131201	1	£30.00	£30.00
				Parts Cost	£150.00

CHECK PRICES BEFORE SENDING QUOTE

Quote Sent

For orders, take the ORD, the final report and the PO (where applicable).



Service Repair Sheet 66316
Contact Name: Peter Rainbow
Company/ Hospital Name: Prelude Engineering & Design Ltd
General Phone: 01628 829600
Opera Account: 00013037
Email: prainbow@prelude-design.com
Date Received: 28/Nov/2017
Booked in By: Robert Connor

Repair SRN29221 Ref 0111211 S/N 303681 Equipment Type Oxygen Monitor — Under Warranty — No Fault Found — Time :0 Hour(s)
The GB300 Oxygen monitor has been tested. No fault was found.

Repair SRN29222 Ref 0131200 S/N Equipment Type Oxygen Monitor Cable — End Of Life — Time :0 Hour(s)
Parts Replaced
Qty: 1 0131202 Oxygen Sensor Cable Black.
The sensor cable has been replaced with SN:0012483.

Repair SRN29223 Ref 0110017 S/N 877737 Equipment Type Oxygen Sensor — Under Warranty — No Fault Found — Time :0 Hour(s)
The Oxygen sensor has been tested in air and Oxygen. No fault was found.

Repair SRN29224 Ref 0111211 S/N 261714 Equipment Type Oxygen Monitor — Under Warranty — No Fault Found — Time :0 Hour(s)
The GB300 Oxygen monitor has been tested. No fault was found.

Repair SRN29225 Ref 0131202 S/N 0004196 Equipment Type Oxygen Monitor Cable — End Of Life — Time :0 Hour(s)
Parts Replaced
Qty: 1 0131202 Oxygen Sensor Cable Black.
The sensor cable has been replaced with SN:0012491.

Compare the delivery address to the address located on the customer paperwork or PO, tick each line if correct.

Compare the invoice address on the ORD to the PO, tick each line on the ORD to confirm it is correct. Repeat this for the delivery address. This is not required for quotations unless an invoice address has been supplied on customer paperwork.

Check each line against the quotation details or final report; there MUST be a labour/servicing/evaluation line for each SRN. Check part numbers, descriptions, quantities and prices are correct and tick if so. In the memo under each labour/servicing/evaluation line, there should be a serial number of the unit, an SRS and an SRN number.

Parts should be listed after the labour line; serial numbers should not be noted on parts except where the part has its own serial number.

Note: *Every line should have an SRS and SRN number.*

For export quotes/orders purchasing in USD, ensure there is a bank charge of $25 (if there are no instructions on the memo requesting different charges). If there is a PayPal charge instead of a bank charge, ensure the charge totals 6% of the total value of the products, insurance and carriage (total order excluding PayPal charge).

For orders outside of the UK (England, Wales, Scotland and Northern Ireland) ensure there is an insurance line (INS), the total insurance should be 1% of the total cost of the goods (not including bank, insurance or carriage charges). If the goods are under warranty, there should be a FOC insurance line. This should always be included unless the memo states otherwise. Check the price and tick if correct.

Carriage on export orders may have a different UPS service such as ‘Express’ or ‘Express Saver’. If the order or attached customer emails state a specific service, there should be a printed copy of the UPS calculation attached to the checking paperwork with a box size and prices. Ensure the box size noted matches the printed UPS calculation and tick if correct.

Ensure the correct delivery option has been determined, i.e. Royal Mail/UPS/EXW, referring to VM3COP03.011, VM3COP20.34 and IntraStats/Opera stock pages, as necessary. If details for reference cannot be found, consult with colleagues or confirm courier/pricing with Goods Out, then tick the ORD/QUO if correct.

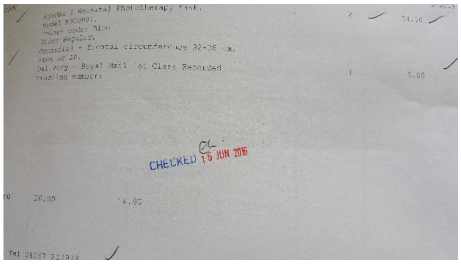
Ensure the priority is correct as per the courier and service used, then check the date due against current cut-off times as per VM3COP03.01 and tick the ORD if correct. This is not required for quotations. Tick the date due on the ORD if correct.

Note*:* *Orders must be scanned in and ORD’s taken to Goods Out before cut-off times for the order to be shipped the same day. If the time is later than the cut-off time, the due date needs to be amended to the next working day.*
Priority 1 – check with Goods Out for possible shipping date
Priority 2 – cut-off time: 11:00am
Priority 3 – cut-off time: 13:00pm
Priority 4 – cut-off time: 15:30pm

Errors - If any details are incorrect, circle them as you work through it, it would be helpful to write the correct information on the QUO/ORD to enable the office to identify the error; remember to sign and date any hand written notes. After checking the entire ORD/QUO, return all of the paperwork to the person who added the order/quote to enable them to amend any necessary details; this then needs to be re-checked.

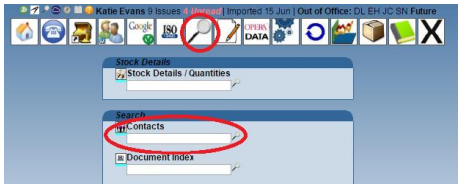
When you are satisfied that the ORD/QUO is correct, paperclip all of the paperwork together again.

Stamp the stapled copy with the ‘checked’ stamp, initial and date next to the stamp.



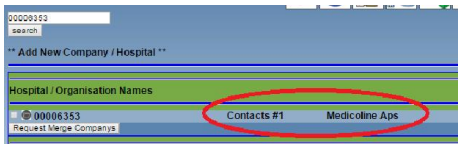
For quotations, return the checked quotation to the office; they will send it to the customer for approval.

For orders, using IntraStats, navigate to the ‘lookup’ tab and click in the ‘Contacts’ field.

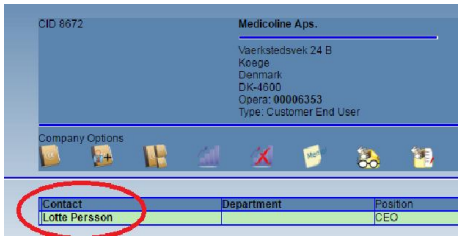


Using your barcode scanner, scan the ‘ACC’ barcode located at the top-centre of the ORD. This will enter the account number and proceed automatically to the next screen. If you do not have access to a barcode scanner, type the account number (e.g. 00006353) into this box and hit enter.

Click on the company name.

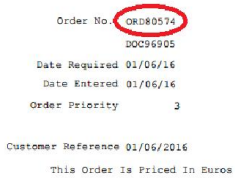


Select the contact name as seen on the bottom-left of the ORD. If the name is not listed on IntraStats, refer to VM3COP20.081 on how to add contacts to the contact management system.

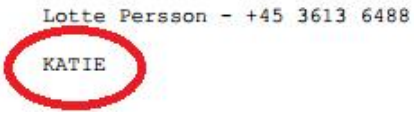


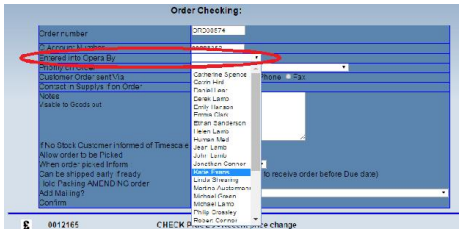
Click on the ‘Order Checking’ icon.

Working you way down the screen, input each section, starting at ‘Order number’. Using your barcode scanner, scan the ‘ORD’ barcode, this will enter the ORD number located at the top-right of the ORD paperwork. If no barcode scanner is available, type the ORD number eg. “ORD80574”, be very careful when typing the ORD and double check that you entered the correct number.

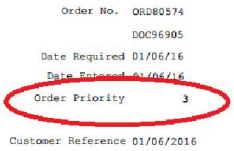


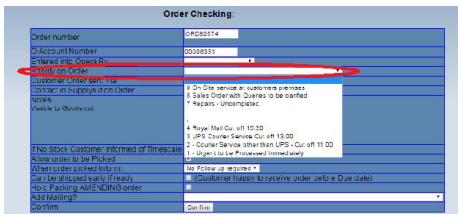
The ‘Entered into Opera by’ box needs to contain the name of the person listed at the bottom-left of the ORD in capital letters. This is the colleague who added the order to Opera



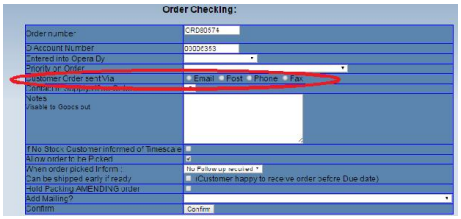


‘Priority on order’ needs to match the priority as seen at the top-right of the ORD

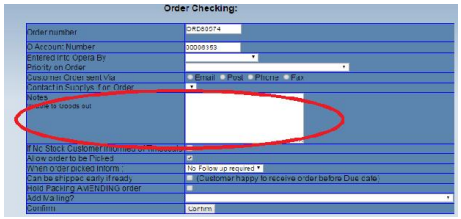




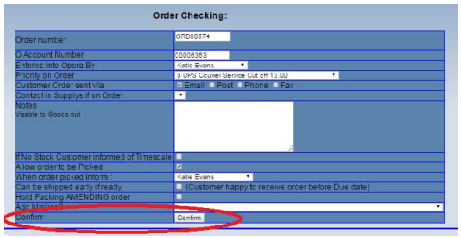
Click the appropriate button for method of how the PO was received, as per the original PO from the customer.



Any hand-written notes on the ORD must be typed here in the ‘Notes’ field.



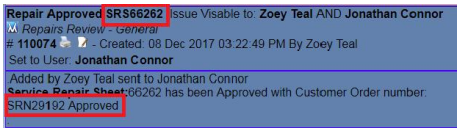
When all details are correct, click ‘confirm’.



Place the paper clipped paperwork in the ‘ORDERS’ tray located in Goods Out.

Quotation accepted

If a quotation has been accepted, an issue will be received from the office to advise you. This needs to be forwarded to the relevant engineer.

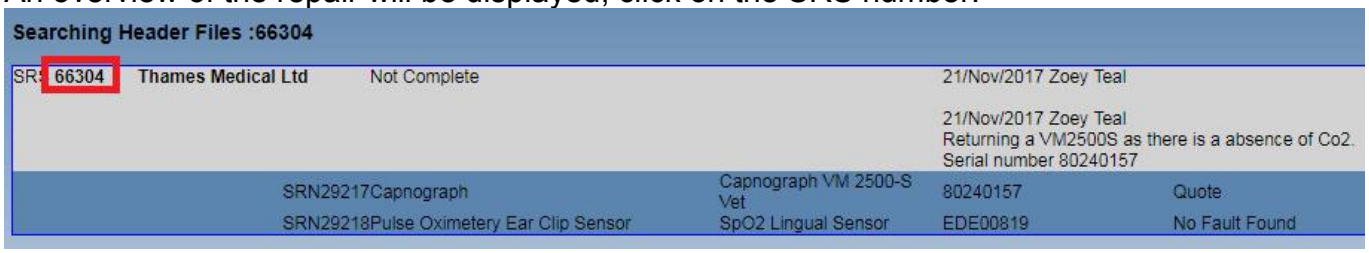


If you are uncertain of which engineer to send it to, you can check the SRS page for the engineer who added the notes. Make a note of the SRS number on the issue.

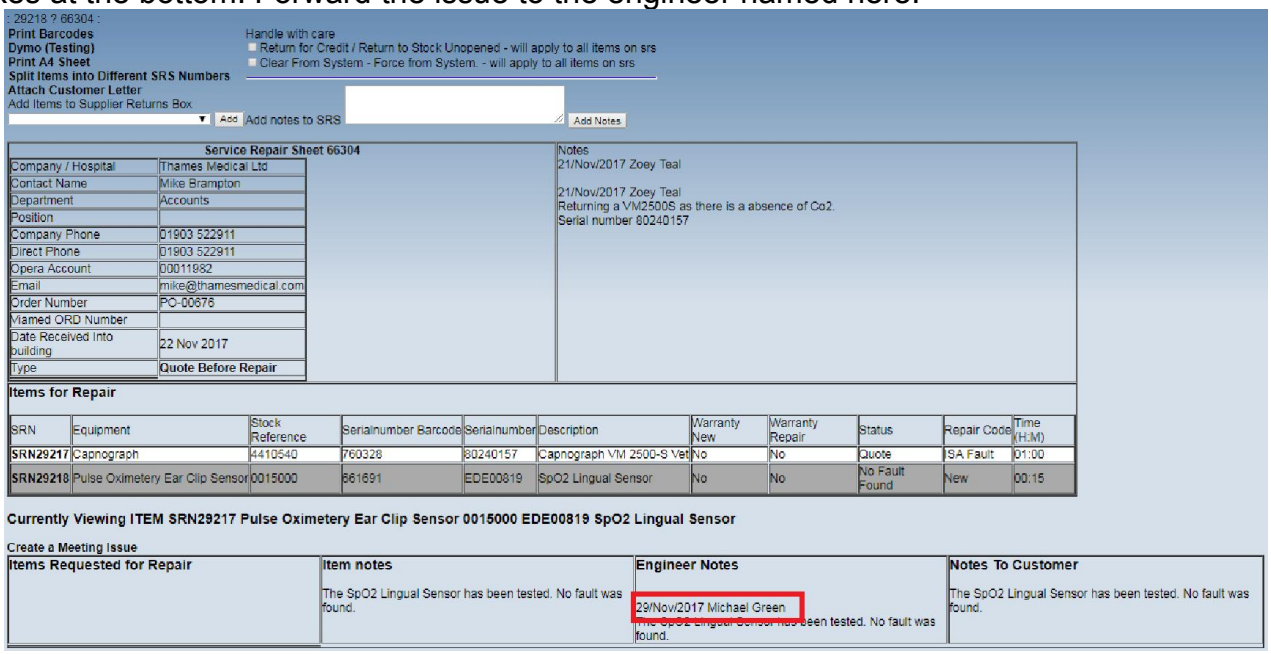
From IntraStats, click on the 'Returns' tab and select the 'Find Customer Repairs' button under the 'Search' heading.

Enter the numerals from the repair reference number; the 'SRS' prefix is not required. Then click the 'Submit' button.

An overview of the repair will be displayed, click on the SRS number.



The details of the repair will now be displayed; the engineers name will appear in one of the text boxes at the bottom. Forward the issue to the engineer named here.



Quotation declined

If a quotation has been decline, an issue will be received from the office to advise you. This needs to be forwarded to the relevant engineer.

If you are uncertain of which engineer to send it to, see the steps at the top of this page.

The issue will state whether the customer wants us to returned the faulty goods or dispose of them.

Returning goods to the customer

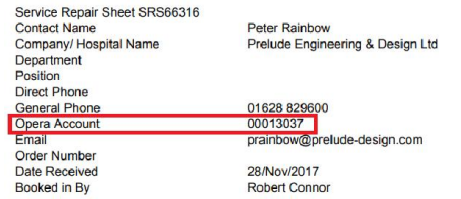
The engineer will update and close the SRS, ask the office to generate the ORD and paperwork ready to return to the customer. Check the order paperwork and place in the Goods Out ‘ORDERS’ tray.

Disposing of goods

The engineer will update and close the SRS.

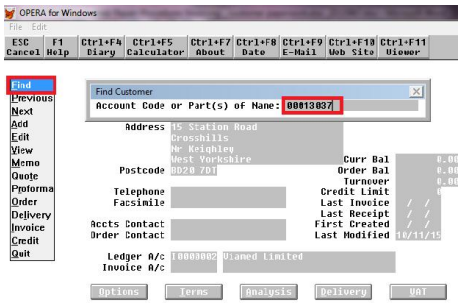
The quotation on Opera now needs to be deleted. Log into Opera as per VM3COP20.72.

Locate the account number on the SRS paperwork.



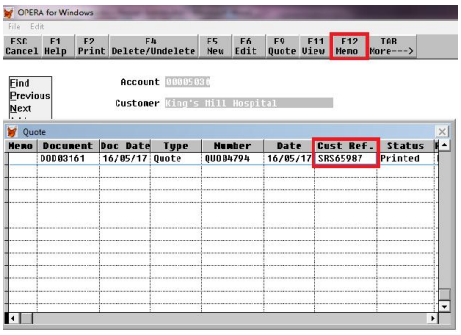
Service Repair Sheet SRS66316	
Contact Name	Peter Rainbow
Company/ Hospital Name	Prelude Engineering & Design Ltd
Department	
Position	
Direct Phone	
General Phone	01628 829600
Opera Account	00013037
Email	prainbow@prelude-design.com
Order Number	
Date Received	28/Nov/2017
Booked in By	Robert Connor

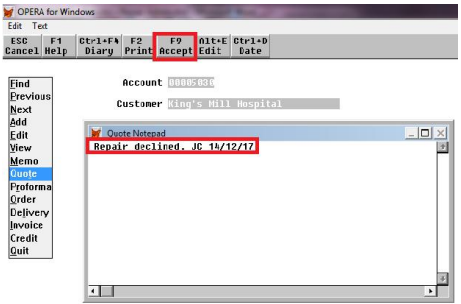
From Opera>S.O.P.>Processing, click ‘Find’ or press the ‘F’ key. Type the account number and press the ‘Enter’ key.



Click ‘Quote’ or press the ‘T’ key.

From the ‘Cust Ref.’ Column, locate the returns reference number and click on it. Click the ‘F12 – Memo’ button or press the ‘F12’ key.

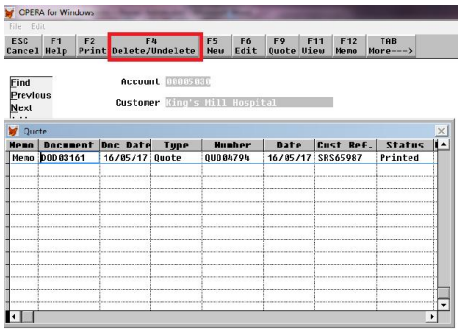




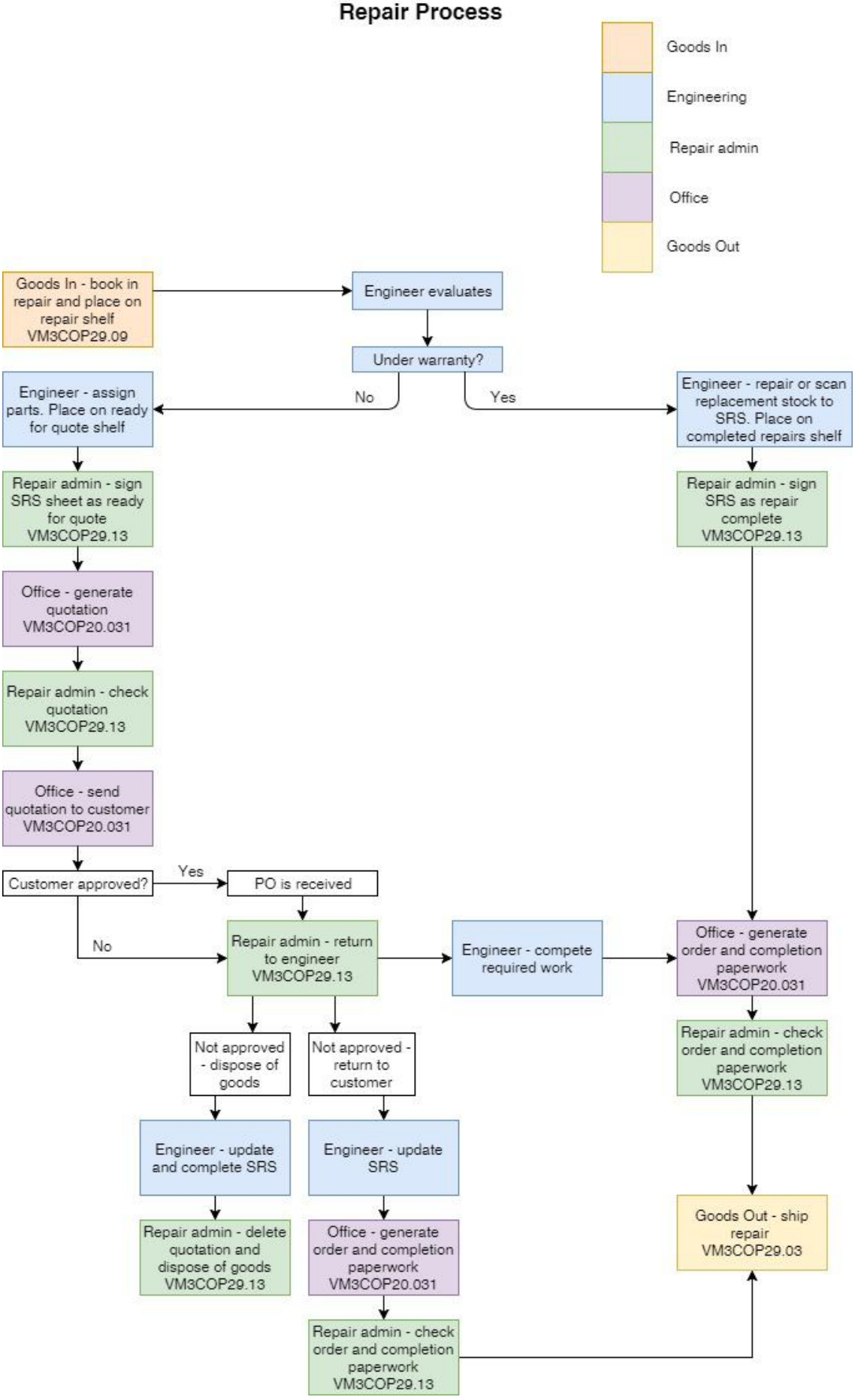
When the notepad appear, add a memo to say the repair was declined, remember to initial and date and Opera memos. Then click ‘F9 Accept’ or press the ‘F9’ key.

You will be asked if you would like to save the changes, click the ‘Yes’ button.

Click the ‘F4 Delete/Undelete’ button or press the ‘F4’ key.



You will be asked to confirm that you would like to delete the document, click the ‘Yes’ button.

Dispose of any oxygen sensors in the oxygen sensor bin located in the Goods In corridor. Any other item should be disposed of in the WEEE waste.

Repair Process