VM3COP29.09 – Goods In - Booking In Returns and Repairs

Receiving the Goods

1. When packages are received, they are placed in the Goods In corridor, on the 'Goods In – Stock to be Processed' shelf. Packages on this shelf are ready to be booked into the system.

2. Begin by checking the packaging; if there is any damage, photographs need to be taken.

3. If all is well, open the box and remove the contents

4. Check the paperwork that has been returned with the product to find the repair reference number that begins with 'SRS' followed by a five digit number. E.g. SRS66234.

5. Using the PC located in the Goods In corridor, log in to IntraStats. Click on the 'Stock' icon, locate the 'Goods In' list and then click on 'Deliveries'.

6. Select the 'Shipper', 'Condition' and 'Number Boxes Delivered' from the drop down menus.

7. Open the 'SRS Returns' drop down menu and select the correct SRS number. If the customer did not provide a reference number, you will need to search the system.

- To search the system, click on the 'Returns' tab and click on 'Find Customer Repairs'.

- Enter the name of the company/hospital who has returned the item and click 'Submit'.

- You will be presented with a list of outstanding and completed returns from that customer. Locate the serial number of the unit and match it against and outstanding return.

- Return to step 7 and enter the SRS number against the, 'SRS Returns' field.

- If there are no outstanding returns, use the serial number search. From the, 'Lookup' tab, enter the serial number in the 'Serial Number' field and press the 'Enter' key or click the magnifying glass icon to the right of the field.

- A results page will be displayed, ensure the serial number matches the unit that has been returned. Click on the invoice number.

- The next page will display the customer order details; make a note of the customer account number.

ORD70307 IN134540 - 1Z9W9638DK68799802 delivery unknown

Delivery Address		Invoice Address
00011982	IN134540 23/09/2014	I0011982
Thames Medical Ltd	Emily Hanson Emailed Nikki Davies on 24 Sep 2014	Thames Medical Ltd
Thames House		Thames House
8 A Becket Gardens	Order	8 A Becket Gardens
Worthing	ORD70307	Worthing
West Sussex	(22/09/2014)	West Sussex
BN13 2BW	Log Error on Order or Invoice	BN13 2BW
01903 522911		01903 522911
UPS: 1Z9W9638DK68799802	Customer Reference	
	PO4229	

- Return to the 'Returns' tab and click on '0 Quick Generate SRS Number'.

Customer Repair Returns
- 0 Quick Generate SRS Number
- 1 Returns Receive Goods

- Click the 'ENTER/UPDATE Customer Details' button

Returns Number SRS66313 Generated

24/Nov/2017 Katie Evans

ENTER / UPDATE Customer Details

If customers are returning Equipment, Please Ask / ~Inform them to Remove All batterys before shipping.

Cancel Repair id#66313 its not needed

- Click on the '>> Search Contact <<' field.

If customers are returning Equipment, Please Ask / Inform them to Remove All batteries before shipping.

SRS Number 66313

>> Search Contact <<   Fill Fields

Company / Hospital	
Contact Name	
Department	
Position	
Company Phone	
Direct Phone	
Opera Account	
Email	
Notes	24/Nov/2017 Katie Evans
Order Number	
Sale or Return ID	
Repair / Quote	▼
Company	Viamed ▼
	Update Details

- A new window will open, type the company name into the search field and press the 'Search' button.

- A list of customers will appear, select the most appropriate account. For Viamed customers, this will be an eight digit account number beginning with 0; the account with the same number but beginning with I is for accounting only. Accounts whose accounts number has letters instead of numbers are Vandagraph accounts.

  When the correct account has been located, click on the drop down box and select the name of the person who sent the repair/return back to us, then click the 'Use' button next to their name.

- The page will close and you will be returned to the previous screen, the customer details will appear in the search field. Press the 'Fill Fields' button. This prevents any errors.

The contact detail fields below will be filled automatically.

In the 'Notes' field beneath, list the item names and serial numbers of the goods returned, if the return is for items on Sale or Return, add the SOR number. Also add any details found in the accompanying paperwork such as a quote request, warranty claim, calibration or service request; these details can be added in the 'Repair / Quote' drop down menu. Ensure the company name at the bottom is correct; this can be amended if required by clicking on the dropdown menu and selecting the correct company name. When everything has entered, click the 'Update Details' button.

- Return to step 7 and refresh the screen by pressing the, 'F5' key or clicking the refresh icon on your browser. The new SRS number will now appear in the list.

Generating the Quote

Note: *Quotes are only required for repairs.*

8. From Opera>SOP>Processing. Click 'Find' or press the 'F' key.

9. Enter the account number of the customer and press the 'Enter' key.

10. If there is a memo present, open it by clicking, 'Memo' on the left, or pressing the 'M' key. Check the memo thoroughly before proceeding, ensuring you adhere to the requirements. If you are unsure of any of the memos, consult with colleagues or the person who added the memo.

11. Click on 'Quote' or press the 'T' key.

12. 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'.

13. You will be presented with this dialog box. Click 'OK' or hit enter to proceed.

14. You will be presented with warehouse options, always choose 'MAIN * Main Warehouse'. You will then be directed to the order processing screens.

15. In the 'Cust Ref' box, enter the returns reference number. E.g. 'SRS66234'.

Change the Priority' field to '7'; this means that it is an ongoing repair and prevents it from being shipped back to the customer before completion.

16. In the 'Comments' field, enter the customers name and telephone number.

17. When you are confident that all of these details are correct, press 'F9' to continue to the next page.

18. In the reference field, enter 'SRSNUMBER'. A colon will appear in the 'Description' field. Enter the SRS number after the colon, e.g. ':66234'.

19. Press the 'Esc' key then press or click 'F9' to complete the quote.

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

21. When this message is displayed, click 'No' as an alignment check is not needed at this point.

22. The print dialog will display, choose the correct printer from the drop down box and select 1 for the 'Number of copies'.
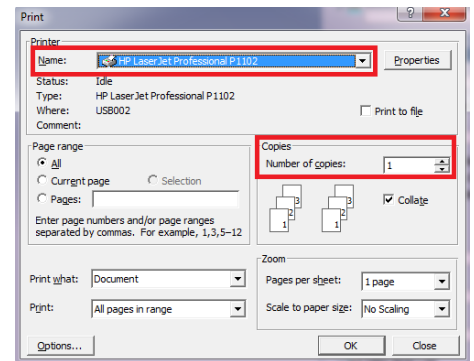
23. Return to IntraStats, in the 'Other Notes' field, enter the quote number or SOR number where required, and every item that was returned including parts and accessories.

24. Click the 'Continue' button to proceed.

25. Next, click on the 'Returns' icon and click on '1 Returns Receive Goods'.
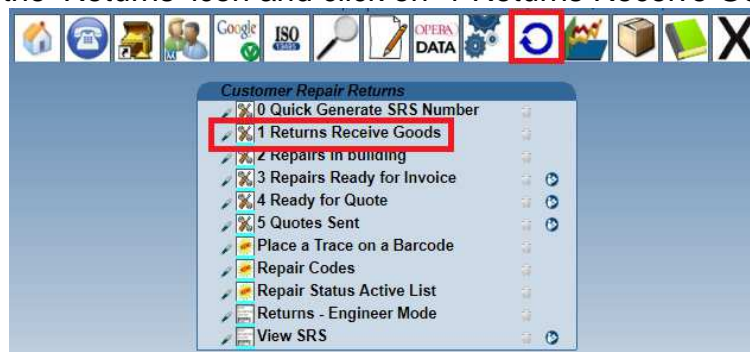
26. From the displayed list, locate the correct SRS number and click the link next to it, which says, 'Receive Goods In'.

27. Enter the 'Good In Book ID' by selecting the delivery you just entered. Enter the quote number in to the 'Opera QUOTE Reference' field if a quote has been generated. Note that the QUO part of the quote number is already there, only the numbers need to be entered. If a purchase order has been received for the full value of the repair/service, select 'Repair' from the 'Repair / Quote' drop down menu. If a purchase order has not been received, amend this field to 'Quote'. If it is a returned Sale or Return, amend the 'Repair/Quote' drop down menu to 'Test Only'.

28. Locate the serial number on the unit and enter it in to the 'Quick Search' field, then click the 'Find / Refresh' button. If the serial number is not visible or the item doesn't have a serial number, enter the barcode ID here. This will fill in the details below. If a serial number or barcode ID cannot be located, enter the details manually.

29. Check the details thoroughly whether they have been automatically filled, or you entered them yourself,

Note: *It is vital that the, 'Equipment Type' field is entered correctly.*

30. Check the 'Estimate warranty Date' field, if the date stated there has not yet passed, tick the, 'New Warranty' box.

Note: *If you are uncertain of the warranty status, confer with experienced colleagues or the technical director before proceeding. See VM3COP02.02 and VM3COP02.1 if unsure who to ask.*

31. When you are confident that the details are correct, click the 'Add To SRS *****' button.

32. When all items have been added to the SRS, click the 'SRS***** Complete' button.

33. Click the 'Print A4 Sheet' link.

34. Click the 'Print' icon and proceed through the print dialog. Two copies are required.

35. Click the 'Print (Zebra) Barcodes' link (not required for SOR, skip to step 40).

Print (Zebra) Barcodes
Print (Dymo) Barcodes
Print A4 Sheet

| SRN Number 66218	
Company / Hospital	Royal Victoria Infirmary
Contact Name	Hendrik Kant
Department	E.M.E Services
Position	EME Support Technician
Company Phone	
Direct Phone	
Opera Account	
Email	Hendrik.Kant@nuth.nhs.uk
Order Number	
Notes	26/Sep/2017 Sarah Walton
	26/Sep/2017 Sarah Walton
	V1000 Serial No GE71743931
	will not switch on/off, it◇s BPM remains 120, no intensity and no auto BPM function

36. Click on the PDF in the bottom left of the window to open it.
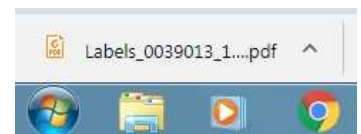
37. When it opens, click 'File' then 'Print' or press Ctrl+P to open the print dialog.
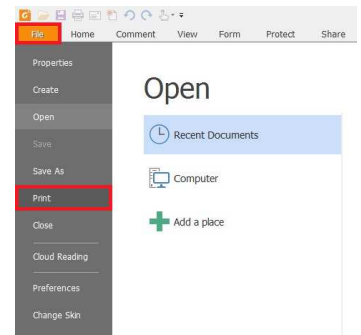
38. From the drop down menu, select 'Zdesigner ZM400 300 dpi (ZPL)' and click 'Print'. The barcode is used when tracking the repair through the system.
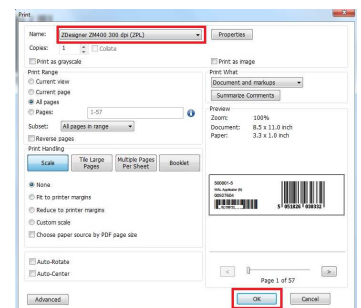
39. Staple one copy of the A4 SRS sheet to the quote and customer paperwork. Place in the 'REPAIR PAPERWORK TO FILE' tray. The tray is located in the Goods In corridor.

40. Place the goods, the barcode and the single A4 SRS sheet in to the correct colour ducket:
   UK repairs – blue
   Export repairs – orange
   Urgent repairs – red

   Note: *Empty duckets are located on the shelving in the Goods In corridor.*

41. On the front of the ducket, write the SRS number, SOR number if applicable, the customer account number and the date.
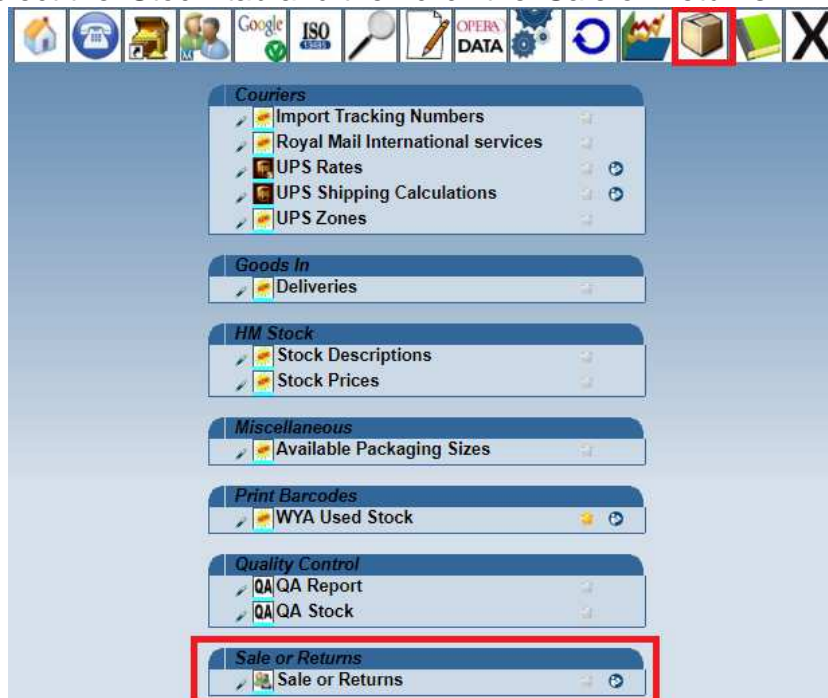

42. Take the ducket to the Workshop and place on the repair shelf in date order.

For SOR only

On IntraStats, select the 'Stock' tab and then click the 'Sale or Returns link.

From the 'Items Out on Sale / Return' list, locate the SOR number you are working with and click the 'Return' button in the 'Return' column.

All the items that were sent will be displayed in a list with tick boxes on the left. Untick any lines for items that have not been returned. When complete, press the 'Return' button.

An issue will be generated, amend the 'Issue To' drop down menu to the name within the issue stating 'Originally added by:', then click the 'Add Issue' button.