

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 MIA Call-Off Agreement/shipping invoice
- ☐ Second copy of first page of MIA Call-Off Agreement (delivery address and summary of items)
- ☐ 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

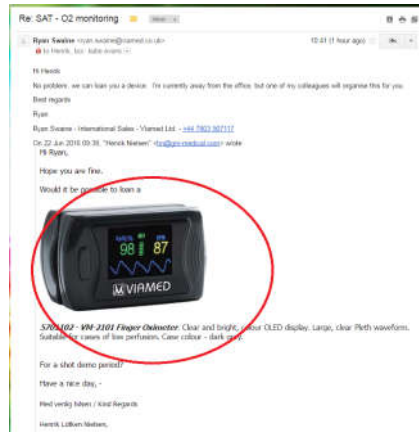
Paperwork Checklist

To File	To Ship
Copy of first page of MIA Call-Off Agreement (delivery address and summary of items)	Signed MIA Call-Off Agreement, including delivery address and summary of items)
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
Error! Not a valid embedded object.
4. Click on the required name
Error! Not a valid embedded object.
5. Click on the Sale or Return icon
Error! Not a valid embedded object.
6. Click, "Add New Sale/Return"
Error! Not a valid embedded object.

This will direct you to the main sale/return page and create a new record for the contact
Error! Not a valid embedded object.

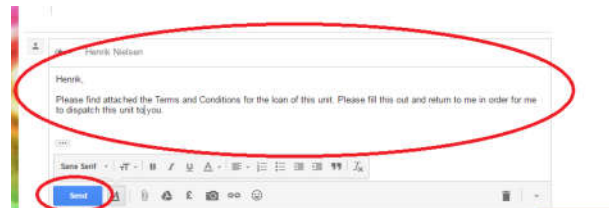
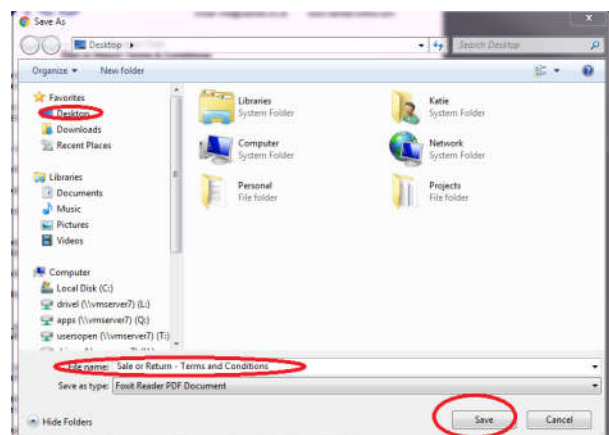
7. Click 'Product Trial – Sale or Return Terms and Conditions'
Error! Not a valid embedded object.

8. Click the PDF icon to open the file
Error! Not a valid embedded object.

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

Error! Not a valid embedded object.

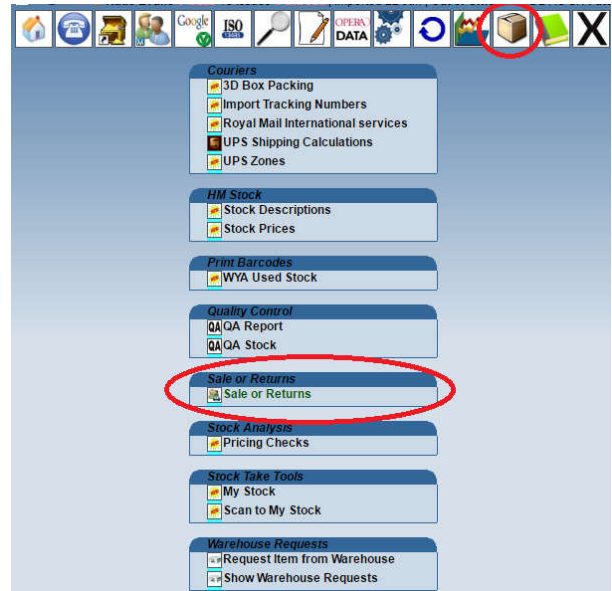
10. When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'



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".

Serial	Serialnumber	Stock Ref	Description
88188	87033489	1014991	Pulse Security Alarm Sensor
88288	Tracking1	1014991	Disposable Spill Sensor - Adult
88297	Tracking10	1014991	Disposable Spill Sensor - Adult
88298	Tracking11	1014991	Disposable Spill Sensor - Adult
88299	Tracking12	1014991	Disposable Spill Sensor - Adult
88300	Tracking13	1014991	Disposable Spill Sensor - Adult
88301	Tracking14	1014991	Disposable Spill Sensor - Adult
88307	Tracking5	1210070	Silicone Face Mask, Size 0
88425	Tracking29	1210070	Silicone Face Mask, Size 0
88424	Tracking30	1210070	Silicone Face Mask, Size 0
88426	Tracking31	1210070	Silicone Face Mask, Size 0
88436	80130142	4410000	Antibacterial VM 2000M
88552	Tracking754433_8	4430012	

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 1034132
Stock Reference 4430000

Issue To: Catherine Spence
Related to Issue
Stock Ref: 4430000
PO Ref: 00000002
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.

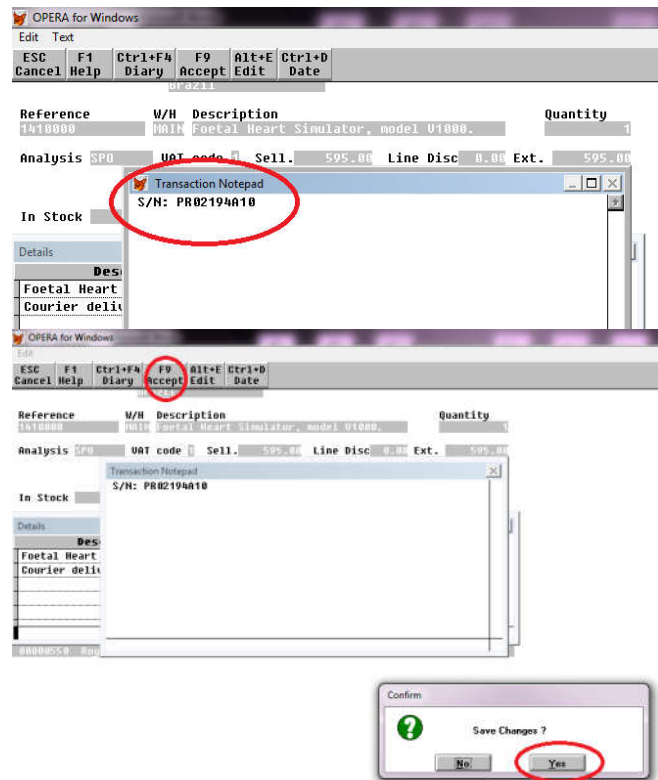
Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

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.

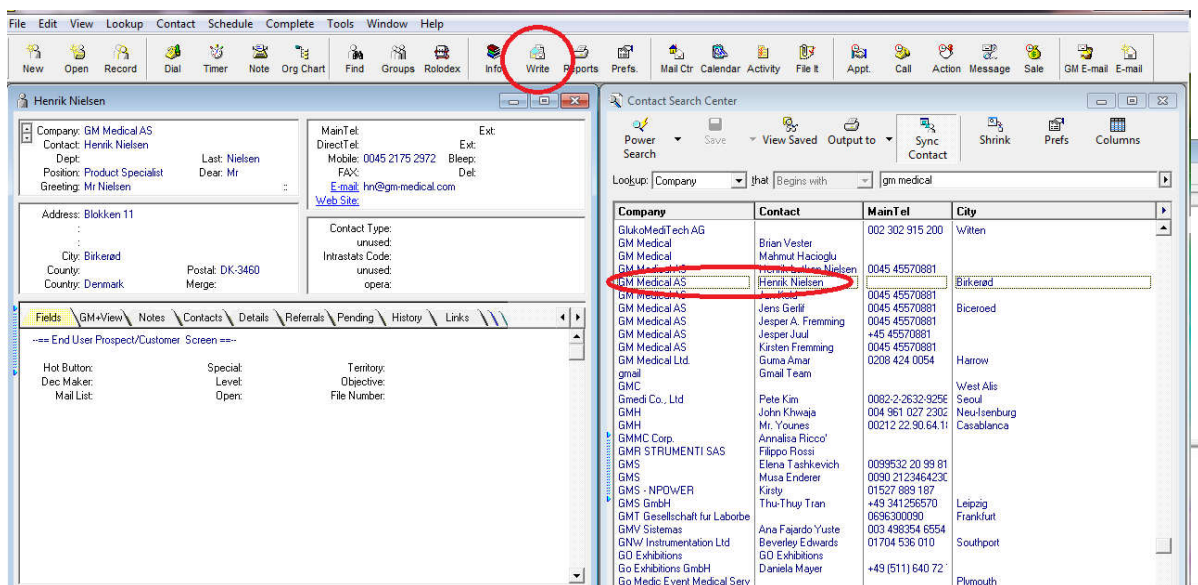
18. There may be additional notes here.



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”.

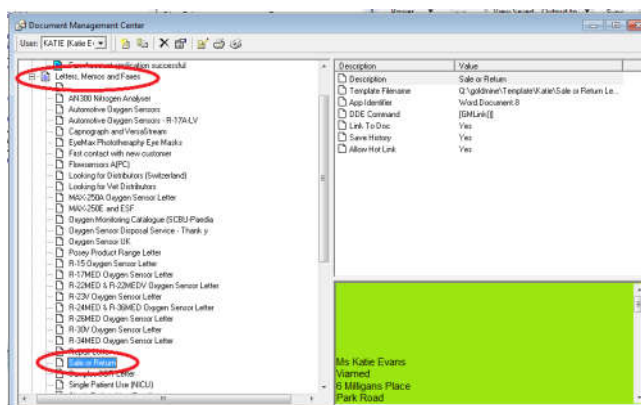
20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

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



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

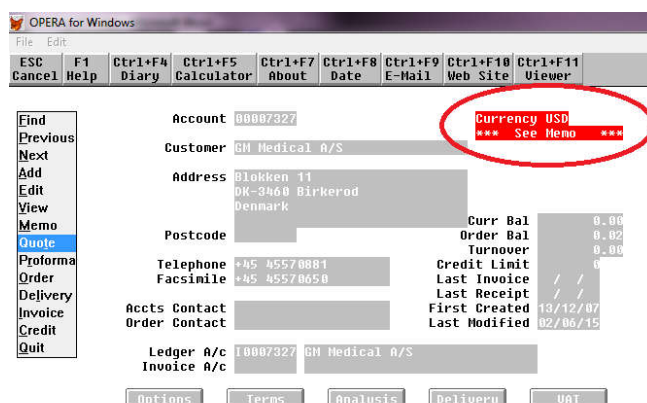
Katie Evans
Office Administrator

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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.

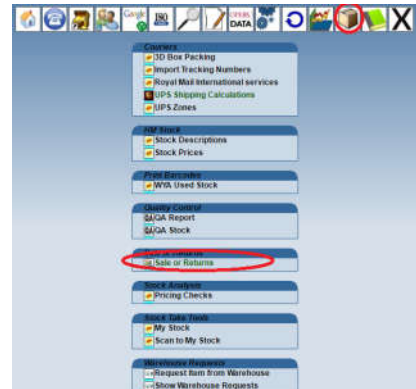
25. When complete, print one copy of this letter on letterhead and save to drive>current year>current month, with the following format:

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 Select with all sale or return goods for									
Product / Rate or Return Terms and Conditions									
Wanted Product / Trial Feedback Page									
Eos Return Not Seen in Preparation									
ID#	Product	Quantity	Name	Rate	Unit	Unit Price	Unit Cost	Unit Profit	Unit Margin
000008	00001000	10/Dec/2015	Amesley Surgical Hospital	400	100	400	100	300	75%
000009	00001000	10/Dec/2015	Amesley Surgical Hospital	400	100	400	100	300	75%
000010	00001000	10/Dec/2015	Birmingham Heartlands Hospital	400	100	400	100	300	75%
000011	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000012	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000013	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000014	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000015	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000016	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000017	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000018	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000019	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000020	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000021	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000022	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000023	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000024	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000025	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000026	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000027	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000028	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000029	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000030	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000031	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000032	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000033	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000034	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000035	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000036	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000037	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000038	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000039	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000040	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000041	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000042	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000043	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000044	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000045	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000046	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000047	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000048	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000049	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000050	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000051	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000052	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000053	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000054	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000055	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000056	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000057	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000058	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000059	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000060	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000061	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000062	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000063	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000064	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000065	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000066	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000067	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000068	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000069	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000070	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000071	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000072	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000073	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000074	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000075	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000076	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000077	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000078	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000079	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000080	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000081	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000082	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000083	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000084	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000085	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000086	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000087	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000088	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000089	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000090	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000091	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000092	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000093	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000094	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000095	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000096	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000097	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000098	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000099	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%
000100	00001000	10/Dec/2015	Cardiff Medical (Euros)	400	100	400	100	300	75%

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 SGR not the Main CRM - If address needs updating in the CRM you must UPDATE both here and there)

Company: GN Medical A/S

Contact: Henrik Nielsen

Department:

Address: Topstykke 7

Binkend

Denmark

PostCode: 3480

Update

Barcode

Purpose of Device

The trial/testing to be undertaken by the authority (if any)

3210070 Silicone Face Mask, Size 0 Tracking3 (ID690397)

3210070 Silicone Face Mask, Size 0 Tracking2 (ID680423)

3210070 Silicone Face Mask, Size 0 Tracking30 (ID690424)

3210070 Silicone Face Mask, Size 0 Tracking31 (ID690425)

0014835 Pulse Oximetry Wrap Sensor EDL03489 (D708189)

0014750 SpO2 Silicone Sensor - Adult EDM00372 (D711777)

0021260 Pulse Oximeter VM 2160 TS1000 IS (ID642231)

0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID809288)

0034993 Disposable SpO2 Sensor - Adult Tracking10 (ID809207)

0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID809289)

0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID809289)

0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID809300)

0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID809301)

0031006A MPO3000-60 Value 164907500881 (D994068)

0021201 Pulse Oximeter VM 2161 908001728 (D997670)

4330000 SpO2 Sensor - Adult Tracking10 (ID809289)

4330002 Spiro True A/PC Tracking4 (ID076162)

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".

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

Company:

Contact:

Department:

Address:

PostCode:

0121101 Pulse Oximeter-VM 2101 90800125 (iD956730) ☒ Barcode

Finger Pulse Oximeter Purpose of Device

Sale or Return that to determine suitability prior to purchase The trial/testing to be undertaken by the authority (if any)

Learn

Current items on sale Return id #729

Print **Print Picking List**

Stock Ref	Serial number	Barcode	Description	Type
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32. In the field entitled "The trial/testing to be undertaken by the authority (if 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.

Stock Ref	Serial number	Barcode	Description	Type
0034963	Tracking22	869309	Disposable SpO2 Sensor - Adult	Remove

35. Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an MIA Call-Off Agreement 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.

SOR#	Account	Date	Name	MIA	Export	Other
SCRT29	00002360	11Dec2014	Armedale General Hospital	+	+	+

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"

Part Number	Viamed Part Number	Description	Quantity	Value
0012101	0012101	Finger Pulse Oximeter Vi...	1	\$0.00

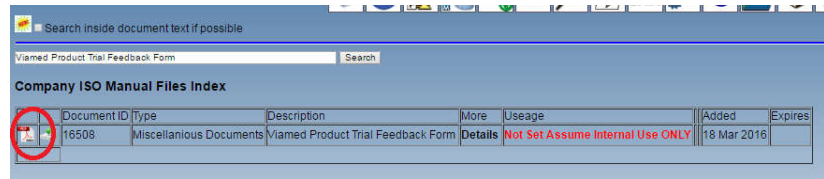
37. Print the delivery note/shipping invoice and print a second copy of the first page.

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.

SOR#	Account	Date	Name	MIA	Export	Other
SCRT29	00002360	11Dec2014	Armedale General Hospital	+	+	+

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 MIA Call-Off Agreement/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:

MIA Call-Off Agreement/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 MIA Call-Off Agreement/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 MIA Call-Off Agreement/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 MIA Call-Off Agreement and place them in the "Active SOR's" file located in the office.

Put one copy of the **Opera quotation, letter, signed MIA Call-Off Agreement (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'.

Error! Not a valid embedded object.

4. Click, 'analyse_sale_return' .

Error! Not a valid embedded object.

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.

Error! Not a valid embedded object.

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.

Error! Not a valid embedded object.

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

OPERA for Windows

File Edit

ESC Cancel F1 Help F2 Print F4 Delete/Undelete F5 New F6 Edit F9 Order F11 View F12 Memo TAB More-->

Find Previous Next ...

Account 00007327 Currency USD *** See Memo ***

Customer GH Medical A/S

Memo	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
Memo	DOC97323	22/06/16	Quote	QU004278	22/06/16	SOR729	Printed

OPERA for Windows

File Edit

ESC Cancel F1 Help F9 Accept

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

Account 00007327 Delivery GH Medical A/S

GH Medical A/S

Blokken 11

3460 Birkerød

Denmark

Cust Ref SOR729 * See Memo * Document DOC97323 22/06/16

Due 22/06/16 Quote QU004278 22/06/16

Priority 3

W/House MAIN Main Warehouse

Raised By KATIE

Comments Henrik Nielson - +45 4557 8881

Goods already supplied on SOR729

Analysis Currency Discount

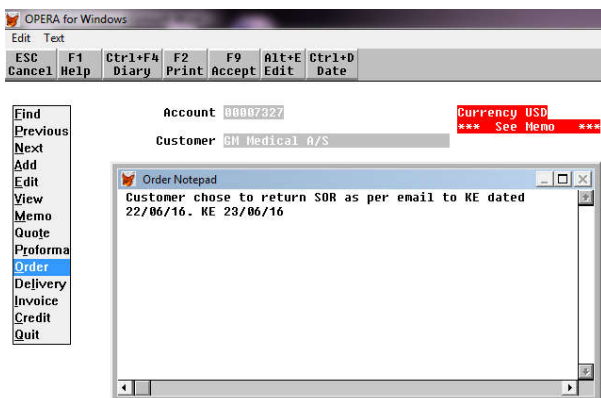
7. Press F9 twice to complete the order.
8. Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR***". Place all of the paperwork in the checking tray. Once checked by a member of the office admin team, take the unticked copy of the ORD to Goods Out as per VM3COP20.05 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".

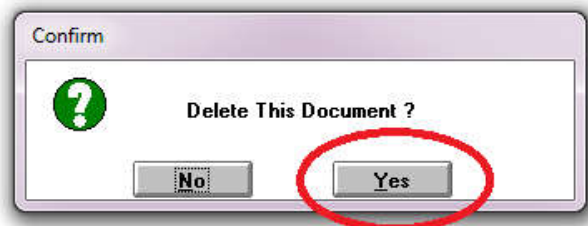
SOR Return

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.