

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 delivery note/shipping invoice
- ☐ Second copy of first page of delivery note/shipping invoice
- ☐ 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

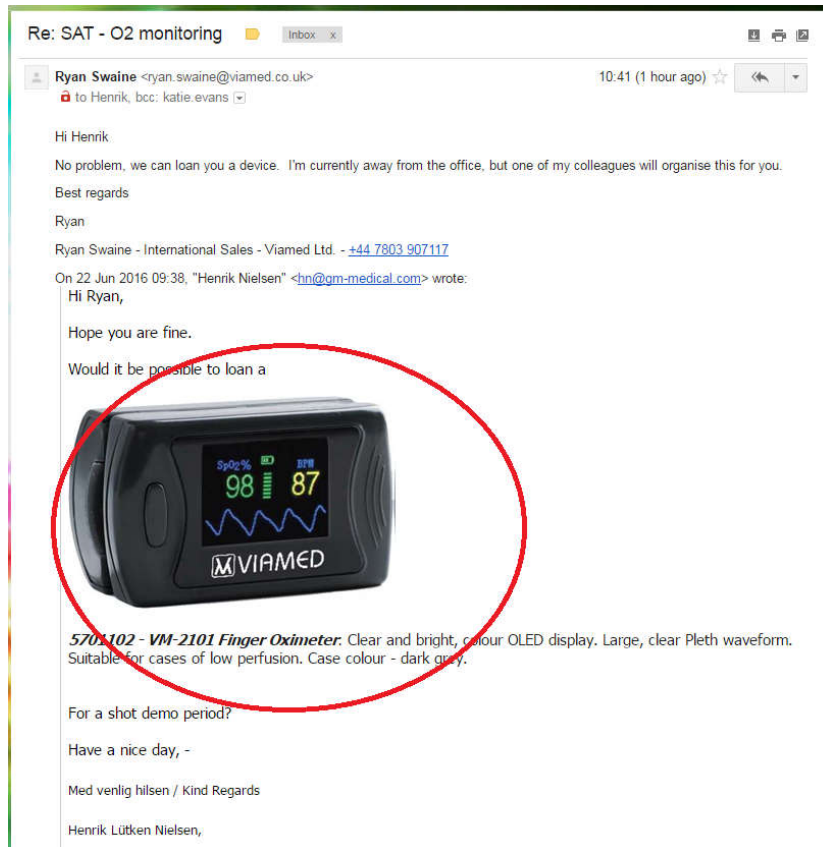
Paperwork Checklist

To File	To Ship
Copy of delivery note/shipping invoice	Signed delivery note/shipping invoice
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

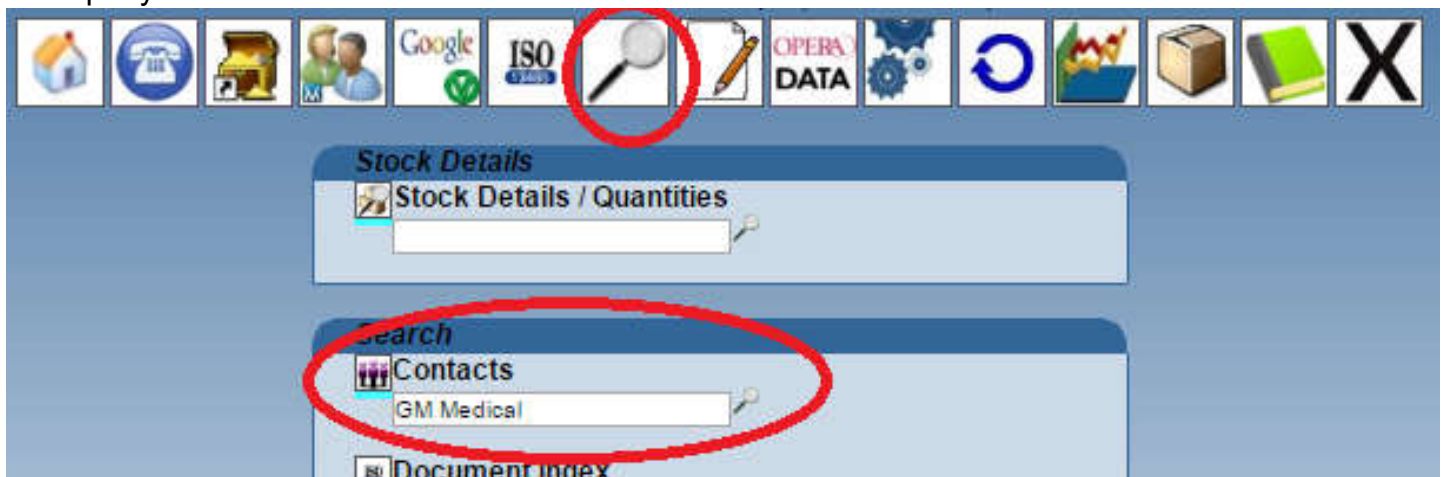
VM3COP20.13 Sending Sale or Return Orders

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

gm medical
search

** Add New Company / Hospital **

Hospital / Organisation Names						
<input type="checkbox"/> 00009300	Contacts #6	Bluepoint Medical GmbH & Co. KG		0049 388 235488029	Supplier	Extra Search
<input checked="" type="checkbox"/> 00007327	Contacts #5	GM Medical		4545 570 881	Customer	
<input checked="" type="checkbox"/> 00007327	Contacts #5	GM Medical A/S	3460	+454 557 0881	Customer End User	
<input checked="" type="checkbox"/> 00007327	Contacts #2	GM Medical A/S	3460	0045 455 70881	Customer End User	
<input checked="" type="checkbox"/> 00006249	Contacts #1	Lemon Medical GmbH	Hammelburg, Germany	D-97762 49(0) 97 327881510	Customer End User	
<input checked="" type="checkbox"/> 00006249	Contacts #1	Lemon Medical GmbH	Hammelburg	49(0) 97 327881510	Customer End User	
<input checked="" type="checkbox"/> 00007521	Contacts #1	Mefina Medical GmbH & Co KG	Germany	40699	Customer End User	

Request Merge Companies

4. Click on the required name

CID 6382

GM Medical A/S.

Topstykket 7
Birkerød
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 00007327

Company Options

Merge Contacts				
Contact	Department	Position	DirectPhone	Email
Henrik Nielsen			4545 570 881	
Søren Bjerre			4545 570 881	

History - Switch to Condensed

Ruth Hardaker	ORD75997	09/09/2015	Søren Bjerre	09/09/2015 Ruth Hardaker
Ruth Hardaker	ORD70351	25/09/2014	Henrik Nielsen	25/09/2014 Ruth Hardaker

5. Click on the Sale or Return icon

CID 6382

GM Medical A/S.

Henrik Nielsen

ID 12875

Topstykket 7
Birkerød
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 00007327

Company Options

Contact Options

History

Ruth Hardaker	ORD70351	25/09/2014	25/09/2014	25/09/2014 Ruth Hardaker
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6. Click, "Add New Sale/Return"

CID 6382 **GM Medical A/S.** **Henrik Nielsen** ID 12875

Topstykke 7
Birkeroed
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 10007327

Henrik Nielsen
Direct Tel: 45 4557 0881
Goldmine ?

Company Options

Contact Options

Sale or Returns
Add New 'Sale / Return'

This will direct you to the main sale/return page and create a new record for the contact

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the

Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital			
SOR682	00002360	03/Dec/2015	Airedale General Hospital			
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital			
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)			
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital			
SOR729	00007327	22/Jun/2016	GM Medical A/S			
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)			
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital			
SOR722	00012966	27/May/2016	Priory Hospital Chelmsford			
SOR627	00000590	24/Nov/2014	Royal Bolton Hospital			
SOR671	00003220	19/Aug/2015	Royal Free Hospital			
SOR692	00000009	26/Feb/2016	Staff Purchasing account			
SOR693	00000009	29/Feb/2016	Staff Purchasing account - KE			
SOR724	00004890	16/Jun/2016	Stepping Hill Hospital			
SOR674	00002130	08/Sep/2015	University Hosp of Hartlepool			
SOR718	00000002	09/May/2016	Viamed Ltd			
SOR720	00000002	23/May/2016	Viamed Ltd			
SOR725	00003450	16/Jun/2016	Whipps Cross University Hospital			
SOR726	00003450	16/Jun/2016	Whipps Cross University Hospital			
SOR727	00003450	16/Jun/2016	Whipps Cross University Hospital			

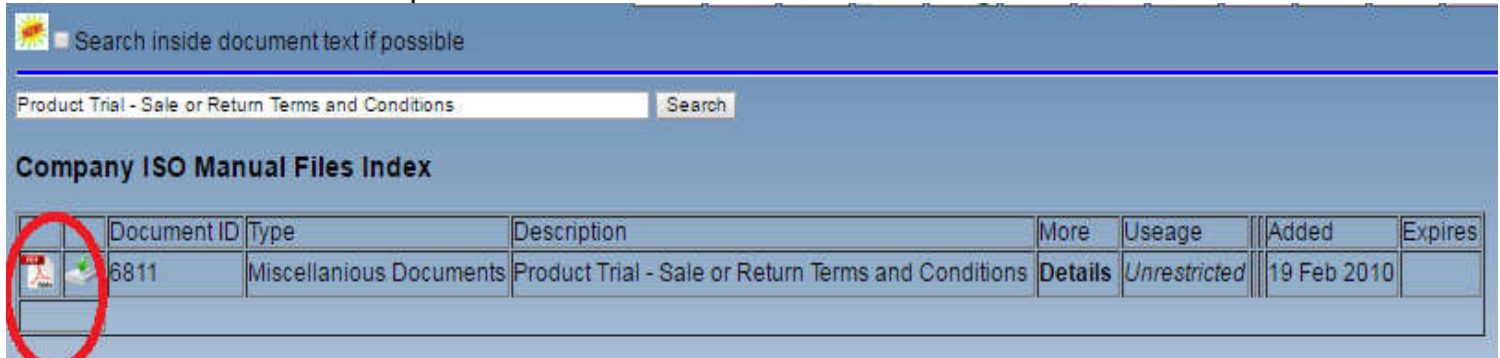
7. Click 'Product Trial – Sale or Return Terms and Conditions

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

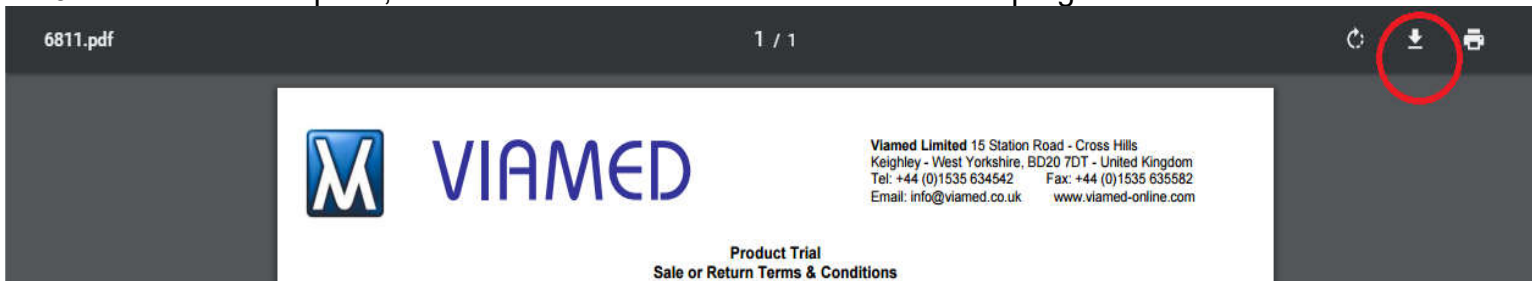
Please Send with all sale or return goods the

Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

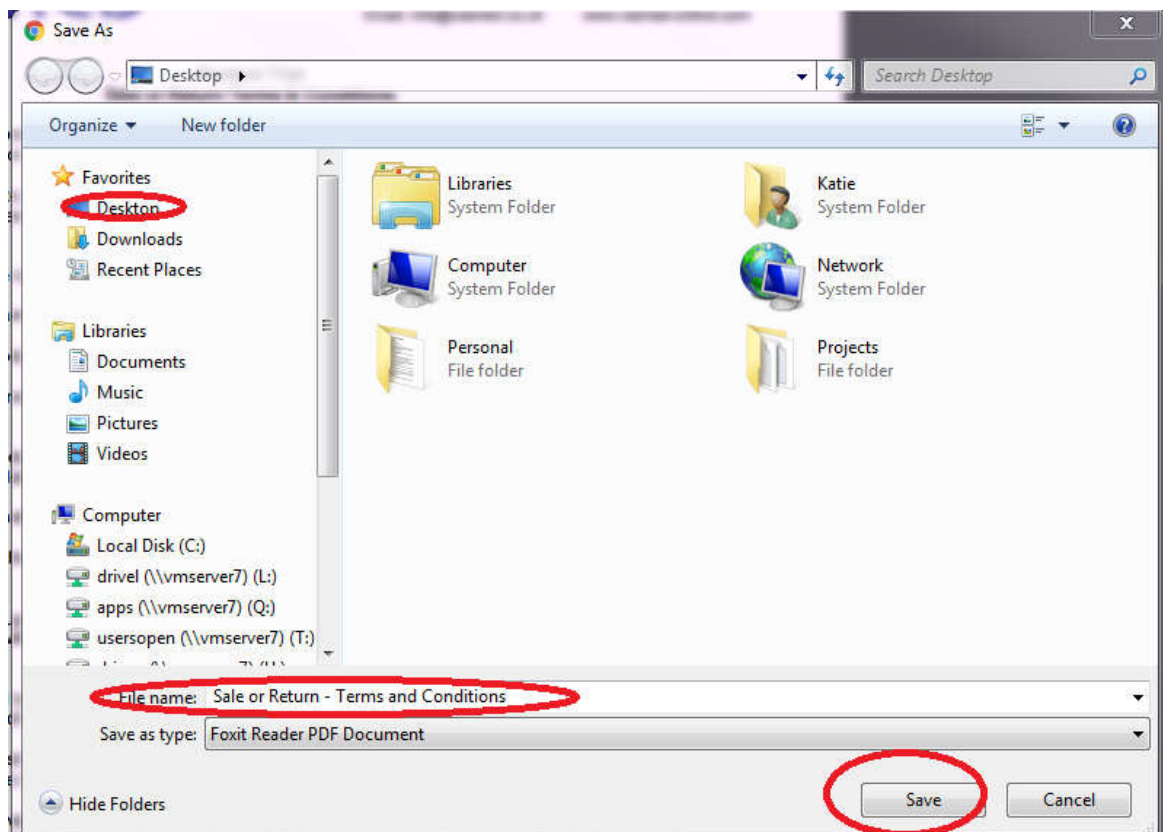
8. Click the PDF icon to open the file



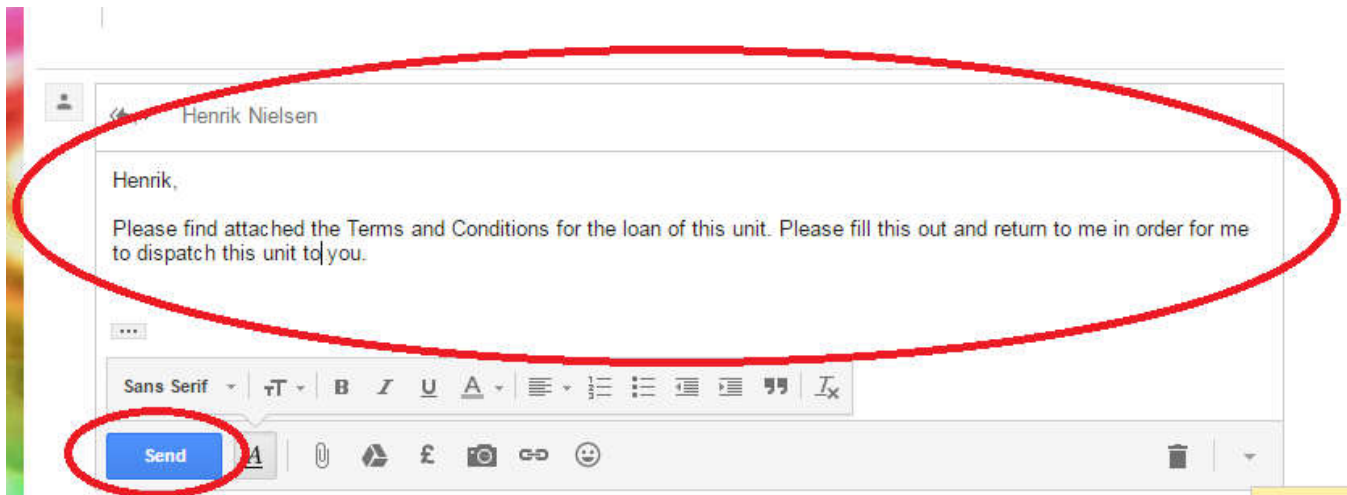
9. When the file opens, click on the download icon located at the top-right of the screen



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

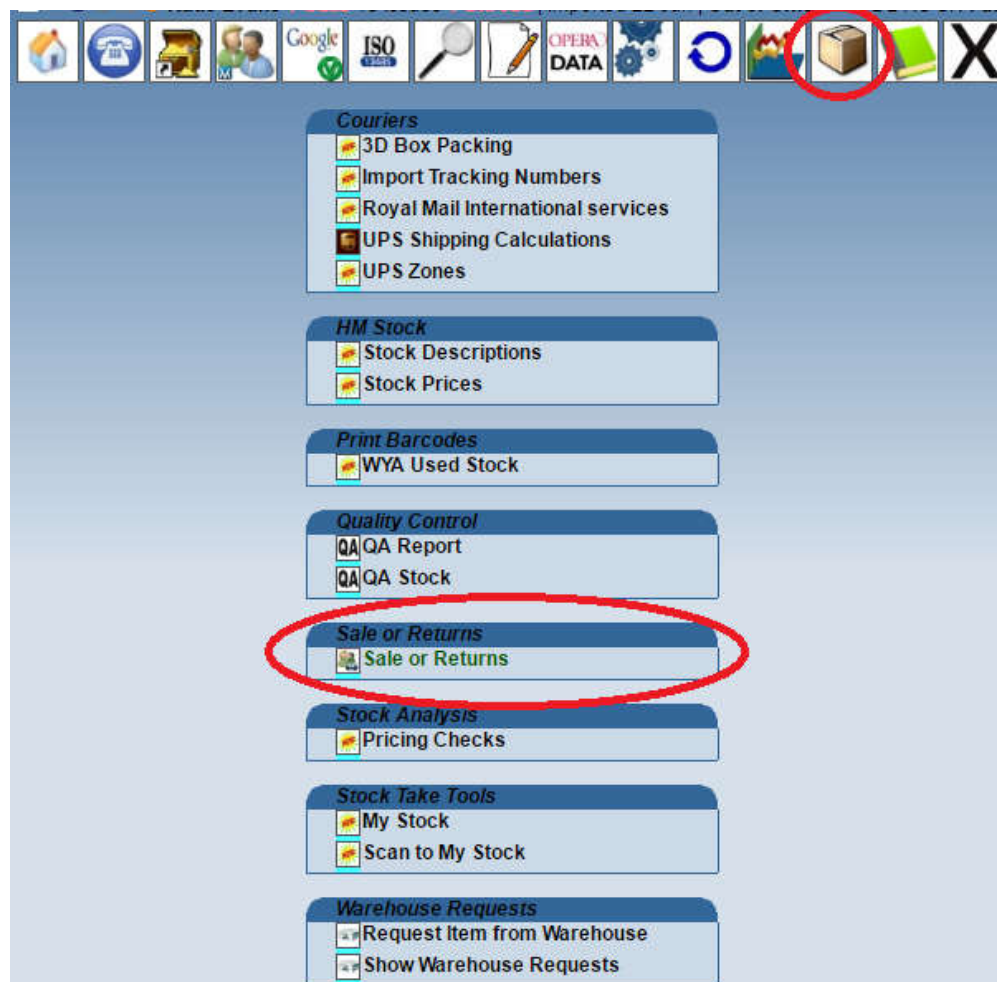


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email below.



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".

Stock currently allocated and available to send Sale or Return

Barcode	Serialnumber	Stock_Ref	Description
708186	EDL03489	0014835	Pulse Oximetry Wrap Sensor
866288	Tracking1	0034993	Disposable SpO2 Sensor - Adult
866297	Tracking10	0034993	Disposable SpO2 Sensor - Adult
866298	Tracking11	0034993	Disposable SpO2 Sensor - Adult
866299	Tracking12	0034993	Disposable SpO2 Sensor - Adult
866300	Tracking13	0034993	Disposable SpO2 Sensor - Adult
866301	Tracking14	0034993	Disposable SpO2 Sensor - Adult
880397	Tracking3	3210070	Silicone Face Mask, Size 0
880423	Tracking29	3210070	Silicone Face Mask, Size 0
880424	Tracking30	3210070	Silicone Face Mask, Size 0
880425	Tracking31	3210070	Silicone Face Mask, Size 0
908436	90730145	4410500	Capnograph VM 2500-M
965552	Tracking754433_0	4420512	

Request New Stock Item to be scanned to Sale or Returns

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 ID34132
Stock Reference: 4430000

Issue To: Catherine Spence

Related to Issue

Stock Ref: 4430000

PO Ref:

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.

#73437 Mark as read, no further action at this time

Request Scanning Item To Sale Or Return : Issue Visable to: Katie Evans AND Catherine Spence
VIAMED Stock Meeting Sale or Returns
73437 - Created: 22 Jun 2016 01:22:34 PM By Katie Evans
Set to User: Catherine Spence
Stock Reference: 0012101
Added by Katie Evans sent to Catherine Spence
Please scan to Sale or Returns Location ID34132 Stock Reference: 0012101

22 Jun 2016 Catherine Spence
id 959730.

New Notes

save draft

.....

Priority

Subject

Request Scanning Item to Sale or return

Hide Issue Until :

Meeting VIAMED Stock Meeting Sale or Returns

Create

Link to Issue #

Attach

Complete ISSUE

Urgent

Next Action

5

Confirm I have updated the Issue - users will be alerted to the update

Related Issue

Add File To Issue 73437

Issue Finished - CLOSED - Noone will see additional notes unless viewed in history

Only change Next action if moving the Issue to a new user and not replying to Katie Evans

Catherine Spence

Changing this Field means Catherine Spence may not see updates to Issue

Combined Issues Notes (Comment order might be out of context - Read Original Issue to be sure)

Issue	Date	User	Action / Notes
73437	22/06/16 01:22:34 PM	Katie Evans	Added by Katie Evans sent to Catherine Spence
73437	22/06/16 03:41:20 PM	Catherine Spence	Please scan to Sale or Returns Location ID34132 Stock Reference: 0012101 New Issue
73437	22/06/16 03:41:20 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:29 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:29 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:29 PM	Catherine Spence	id 959730 Completed
73437	22/06/16 03:41:29 PM	Catherine Spence	id 959730
73437	23/06/16 05:13:19 PM	Katie Evans	Re-Read

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.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return					
Please Send with all sale or return goods the					
Product Trial - Sale or Return Terms and Conditions Viamed Product Trial Feedback Form					
Sale Returns Not Sent / In Preperation					
SOR	Account	Created	Name	Add	Shipping Notes
SOR628	00002360	01/Dec/2014	Airedale General Hospital		EXPORT
SOR682	00002360	03/Dec/2015	Airedale General Hospital		EXPORT
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital		EXPORT
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)		EXPORT
SOR736	00001900	17/Jun/2016	Gloucestershire Royal Hospital		EXPORT
SOR729	00007327	22/Jun/2016	GM Medical A/S		EXPORT
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)		EXPORT

Also, in the comments section beneath the name and telephone number of the customer, state “Goods already supplied on SOR***”

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

Account00007327

GM Medical A/S

Blokken 11

3460 Birkerod

Denmark

Delivery

GM Medical A/S

Blokken 11

DK-3460 Birkerod

Denmark

Cust RefSOR729

MemN

Document** AUTO **

22/06/16

22/06/16

Quote** AUTO **

/ /

Priority3

W/HouseMAINMain Warehouse

ModelN

Raised ByKATIE

CommentsHenrik Nielson - +45 4557 0881

Goods already supplied on SOR729

Analysis

Currency

Discount

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.

OPERA for Windows

File Edit

ESC Cancel F1 Help F4 Del/Undel F5 Add F6 Edit F7 Insert F9 Accept F11 View F12 Memo

Brazil

Reference1410000

W/HMAIN

DescriptionFoetal Heart Simulator, model U1000.

Quantity1

AnalysisSP0

VAT code1

Sell.595.00

Line Disc0.00

Ext.595.00

Cost.295.00

Margn.50.42%

Prof.300.00

Due08/11/16

Priority3

P/O

In Stock6

P.Orders0

Details

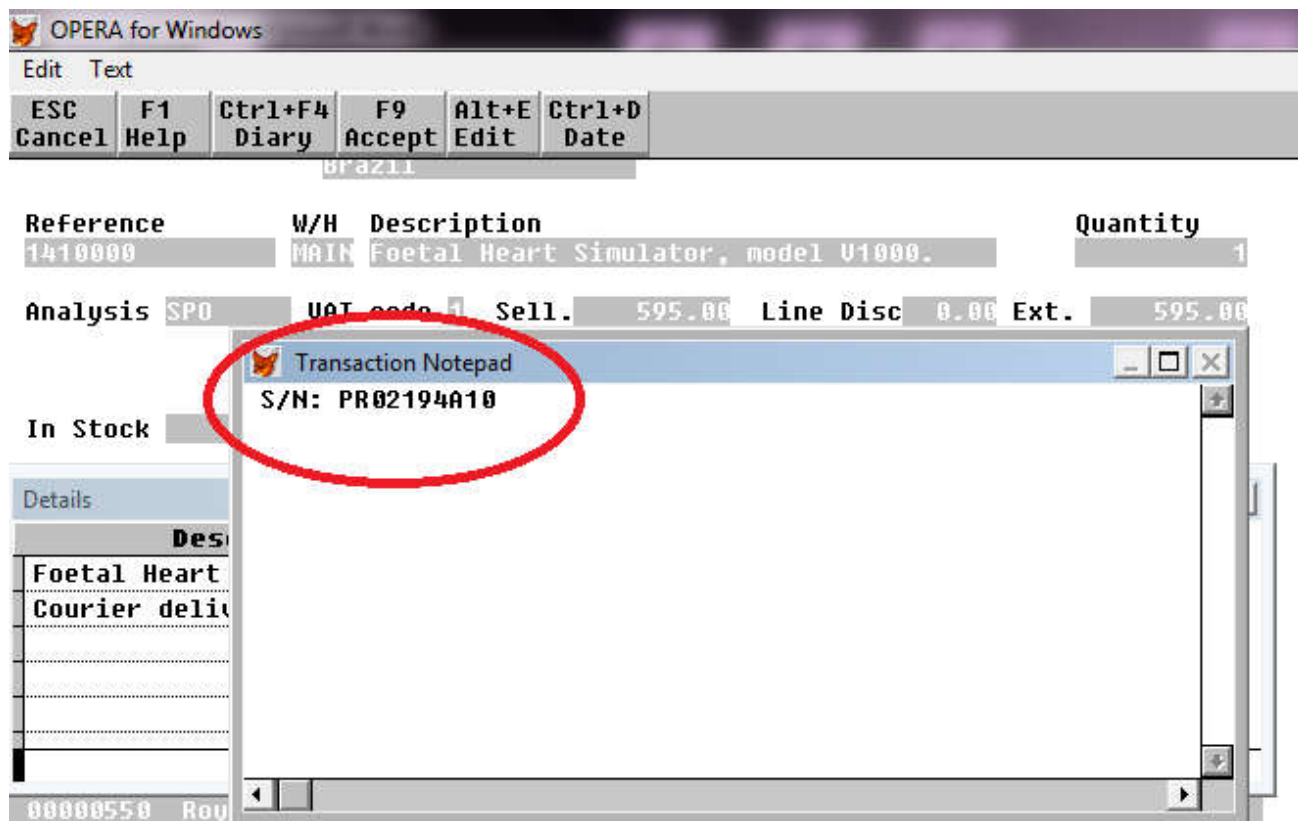
Description	Quantity	Price	Disc.	VAT	Value
Foetal Heart Simulator, model U1000.	1	595.00		1	595.00
Courier delivery - Standard.	1	10.00		1	10.00

00000550 Royal Blackburn Hospital

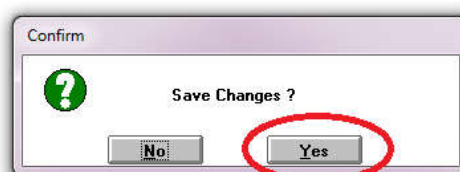
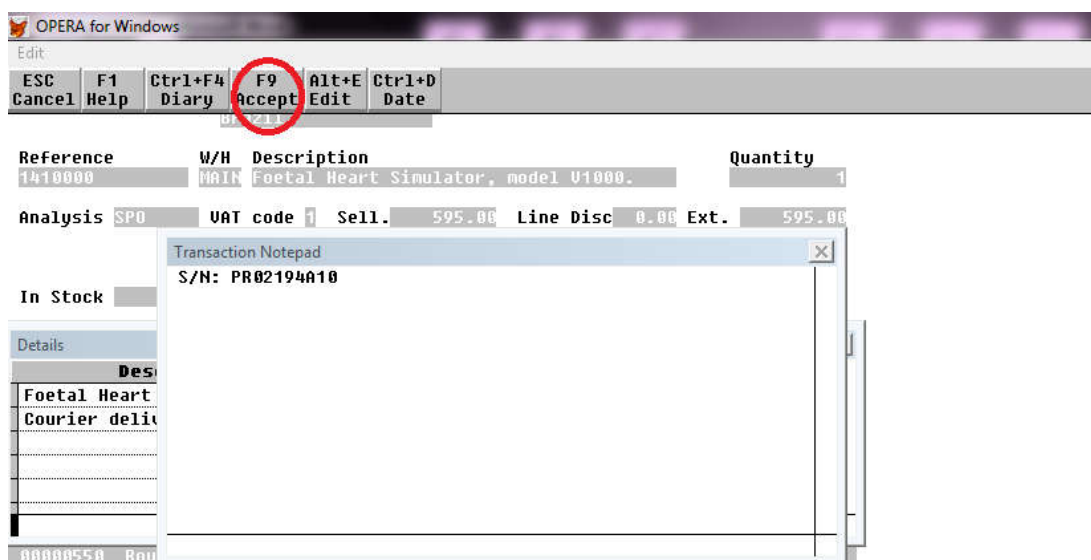
Quote total ex VAT

605.00

18. Type the serial number in the format as seen to the left, e.g. "S/N: ???". There may be additional notes here, if so, add the serial number beneath them.

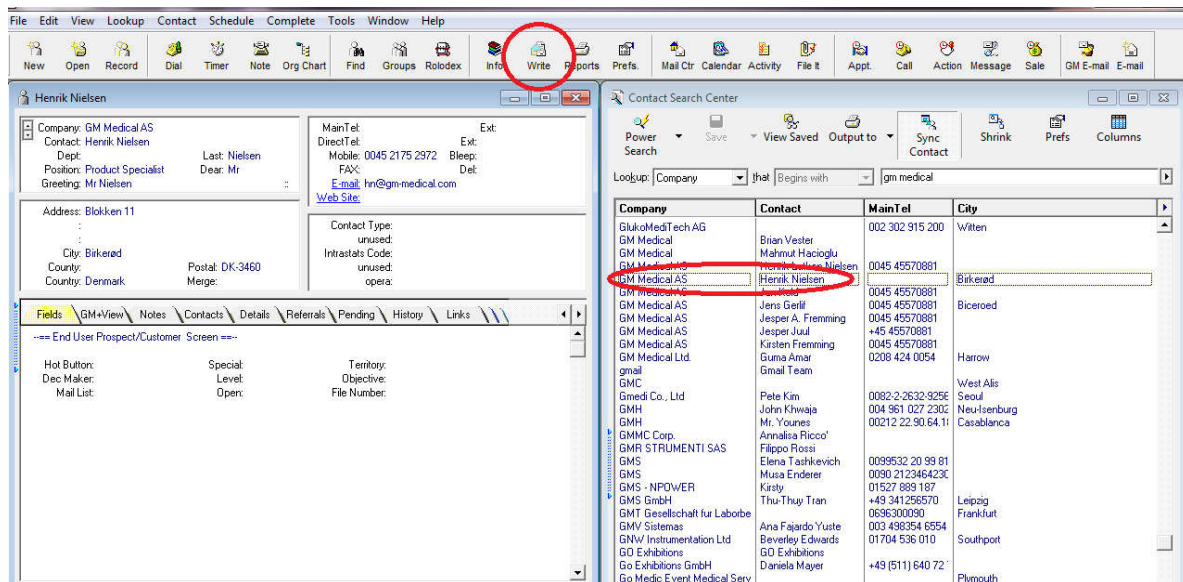


19. When completed, press F9 or click the "F9 Accept" button. You will be asked if you would like to save the changes, click "Yes".



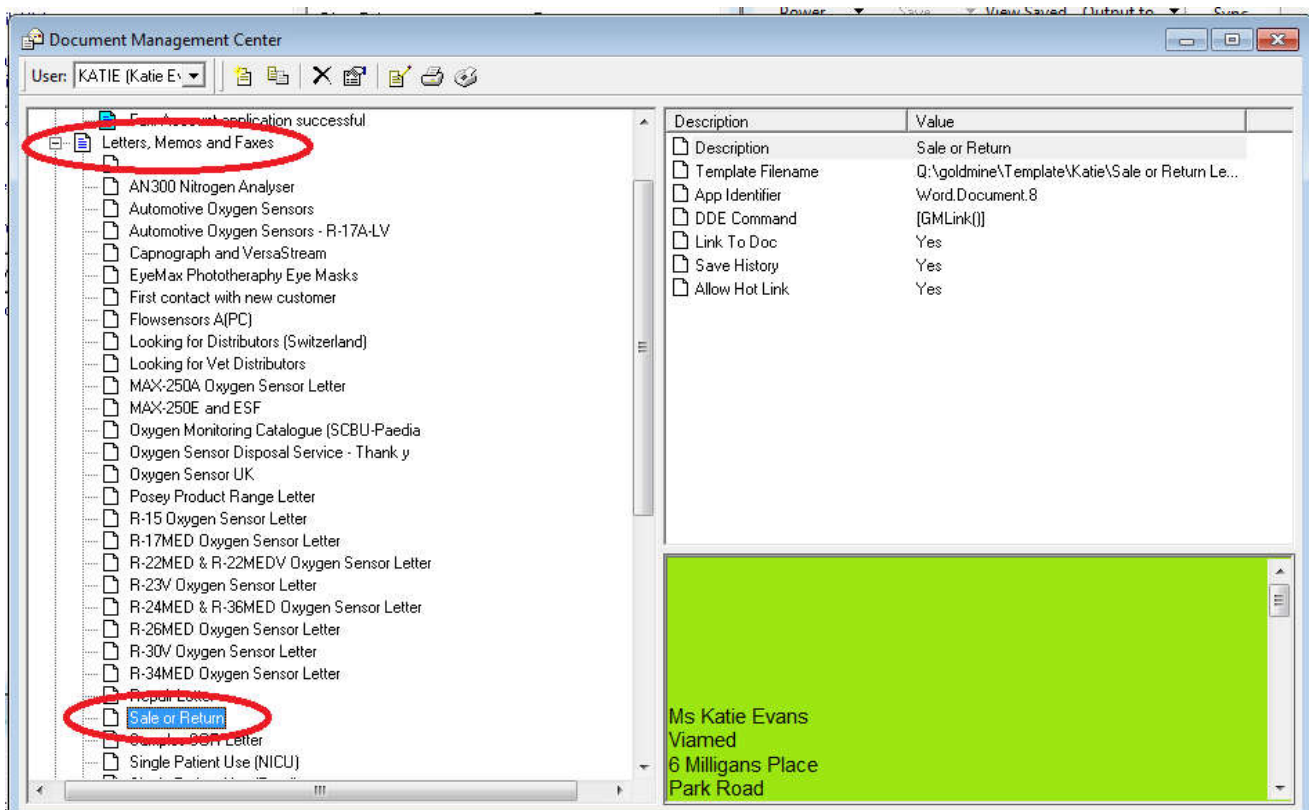
20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

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.

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.

Mr Henrik Nielsen
Product Specialist
GM Medical AS
Blokken 11
Birkerød, 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

25. When complete, print one copy of this letter on letterhead and save to U 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.

OPERA for Windows

File Edit

ESC Cancel F1 Help Ctrl+F4 Diary Ctrl+F5 Calculator Ctrl+F7 About Ctrl+F8 Date Ctrl+F9 E-Mail Ctrl+F10 Web Site Ctrl+F11 Viewer

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

Account: 00007327
 Customer: GM Medical A/S
 Address: Blokken 11
 OK-3460 Birkerød
 Denmark
 Postcode:
 Telephone: +45 45570881
 Facsimile: +45 45570650
 Accts Contact:
 Order Contact:
 Ledger A/c: I0007327 GM Medical A/S
 Invoice A/c:
 Currency: USD
 *** See Memo ***
 Curr Bal: 0.00
 Order Bal: 0.02
 Turnover: 0.00
 Credit Limit:
 Last Invoice: / /
 Last Receipt: / /
 First Created: 13/12/07
 Last Modified: 02/06/15
 Options Terms Analysis Delivery VAT

27. Return to the main SOR page located in Intrastats>Stock icon>"Sale or Returns"

OPERA DATA

Couriers
 3D Box Packing
 Import Tracking Numbers
 Royal Mail International services
 UPS Shipping Calculations
 UPS Zones

HM Stock
 Stock Descriptions
 Stock Prices

Print Barcodes
 WYA Used Stock

Quality Control
 QA QA Report
 QA QA Stock

Sales Returns
 Sale or Returns

Stock Analysis
 Pricing Checks

Stock Take Tools
 My Stock
 Scan to My Stock

Warehouse Requests
 Request Item from Warehouse
 Show Warehouse Requests





























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 Send with all sale or return goods the

Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital		EXPORT  	
SOR682	00002360	03/Dec/2015	Airedale General Hospital		EXPORT  	
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital		EXPORT  	
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)		EXPORT  	
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital		EXPORT  	
SOR729	00007327	22/Jun/2016	GM Medical A/S		EXPORT  	
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)		EXPORT  	

29. Ensure the name and address details at the top of the screen are correct.

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

Company: GM Medical A/S

Contact: Henrik Nielsen

Department:

Address: Topstykke 7

Birkerød

Denmark

PostCode: 3460

Update

Barcode

Purpose of Device

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

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397)

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397)

3210070 Silicone Face Mask, Size 0 Tracking29 (ID580423)

3210070 Silicone Face Mask, Size 0 Tracking30 (ID580424)

3210070 Silicone Face Mask, Size 0 Tracking31 (ID580425)

0014835 Pulse Oximetry Wrap Sensor EDL03489 (ID708186)

0014750 SpO2 Silicone Sensor - Adult EDM00372 (ID711777)

0012160 Pulse Oximeter VM 2160 T81000185 (ID842231)

0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID866288)

0034993 Disposable SpO2 Sensor - Adult Tracking10 (ID866297)

0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID866298)

0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID866299)

0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID866300)

0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID866301)

2810008 MD3000C52 Yellow 154902500981 (ID924098)

0012101 Pulse Oximeter VM 2101 90800125 (ID959730)

4330002 SpiroTrue A(PC) Tracking3 (ID978161)

4330002 SpiroTrue A(PC) Tracking4 (ID978162)

30. From the "Barcode" drop-down on the next page, select the item you want to send.

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".

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".

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

Company: GM Medical A/S

Contact: Henrik Nielsen

Department:

Address: Topstykket 7

Birkerød

Denmark

PostCode: 3460

Update

0012101 Pulse Oximeter VM 2101 90800125 (ID959730) Barcode

Finger Pulse Oximeter Purpose of Device

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

Loan Submit

Current Items on sale Return id #729

Print [Print Picking List](#)

Stock Ref	Serial number	Barcode	Description	Type
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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.

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

Company: Merivaara AB

Contact: Michael Baumann

Department:

Address:

PostCode:

Value for Customs if applicable: \$5

Update

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397) Barcode

Disposable SpO2 Sensor - Adult. Purpose of Device

free of charge sample for evaluation The trial/testing to be undertaken by the authority (if any)

Loan Submit

Current Items on sale Return id #742

Print [Print Picking List](#)

Stock Ref	Serial number	Barcode	Description	Type			
0034993	Tracking22	866309	Disposable SpO2 Sensor - Adult.	g	Remove	Print Delivery Note (Today date)	Print Delivery Note (Created date)

35. Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note 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.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the

Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR730	MEDITEX	23/Jun/2016	70 Bir utton CR datta Road		EXPORT	
SOR628	00002360	01/Dec/2014	Airedale General Hospital		EXPORT	
SOR682	00002360	03/Dec/2015	Airedale General Hospital		EXPORT	
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital		EXPORT	
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)		EXPORT	
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital		EXPORT	
SOR729	00007327	22/Jun/2016	GM Medical A/S		EXPORT	
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)		EXPORT	

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"

Viamed Shipping Invoice

Delivery Address:
GM Medical A/S
Henrik Nielsen
Topstykket 7
Birkerød
Denmark

3460

Date: 23 Jun 2016
Invoice:# SOR00729

Shipper Address:
Viamed
15 Station Road
Cross Hills
Keighley
West Yorkshire
BD20 7DT
+44 (0) 1535 634542
+44 (0) 1535 635582
info@viamed.co.uk

Demo products not for resale Value for Customs : \$100.00

Part Number	Viamed Part Number	Description	Quantity	Value
0012101	0012101	Finger Pulse Oximeter Vi ...	1	\$0.00
Tariff Code: 90181990-00				

Back Alt+Left Arrow

Forward Alt+Right Arrow

Reload Ctrl+R

Save as... Ctrl+S

Print... Ctrl+P

Translate to English

Rotate clockwise

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.

38. On the main Sale Or Return screen, click the link ‘Viamed Product Trial Feedback Form’

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the

Product Trial - Sale or Return terms and Conditions
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital		EXPORT	
SOR682	00002360	03/Dec/2015	Airedale General Hospital		EXPORT	
SOR723	00007356	31/May/2016	Asqa A.S		EXPORT	
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital		EXPORT	
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)		EXPORT	
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)		EXPORT	
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital		EXPORT	
SOR722	00012966	27/May/2016	Priory Hospital Chelmsford		EXPORT	

39. Click on the PDF icon

Search inside document text if possible

Viamed Product Trial Feedback Form Search

Company ISO Manual Files Index

Document ID	Type	Description	More	Useage	Added	Expires
16508	Miscellaneous Documents	Viamed Product Trial Feedback Form	Details	Not Set Assume Internal Use ONLY	18 Mar 2016	

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 delivery note/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:

Delivery note/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 delivery note/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 delivery note/shipping invoice and initial/date next to it. Return to the person who added the SOR.

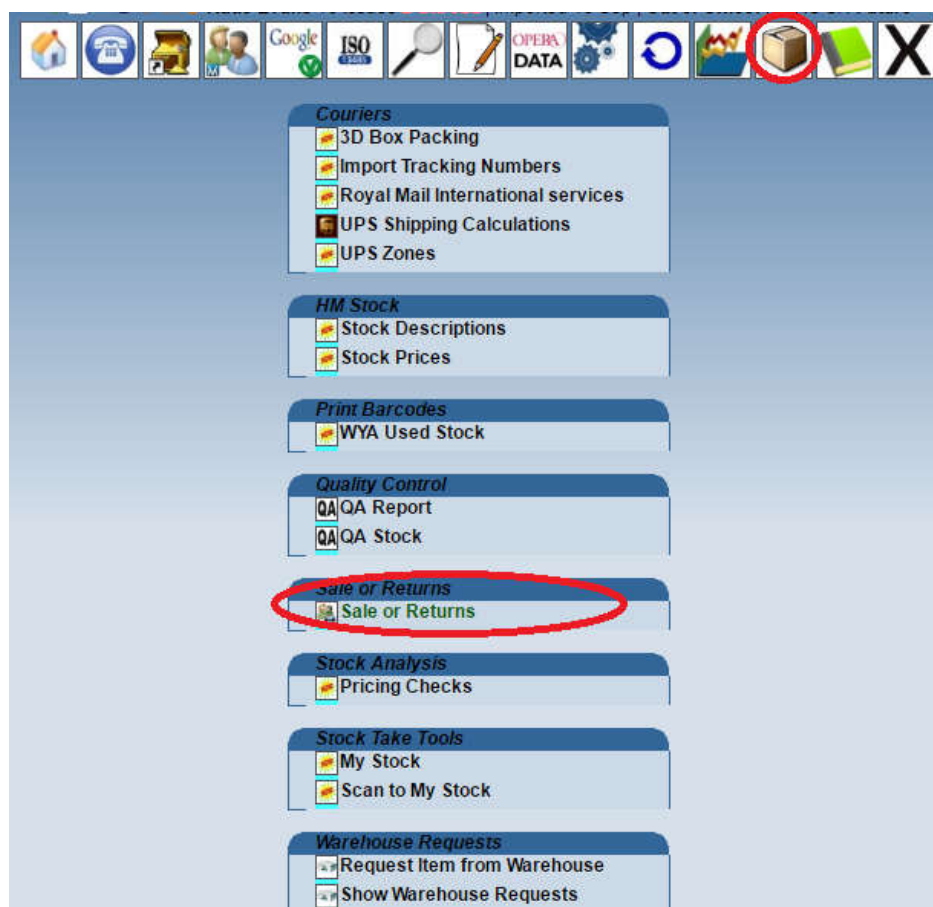
After Checking

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 delivery note and place them in the "Active SOR's" file located in the office.

Put one copy of the **Opera quotation, letter, signed NHS Delivery Note (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'.



4. Click, 'analyse_sale_return' .

The screenshot shows a software interface with a top navigation bar containing various icons. Below the icons is a header section with the text "Add a New Sale / Return Completed Sale / Returns" and a button labeled "analyse_sale_return" which is circled in red. Below this header, there is a section titled "Please Send with all sale or return goods the" followed by "Product Trial - Sale or Return Terms and Conditions" and "Viamed Product Trial Feedback Form". Below this is a section titled "Sale Returns Not Sent / In Preparation" which contains a table with columns: SOR, Account, Created, Name, Add, Shipping Notes, and Send. The table lists several sales returns with their respective details.

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR753	00001430	16/Sep/2016	Dorset County Hospital		EXPORT	
SOR754	00002662	16/Sep/2016	Liverpool Womens Hospital		EXPORT	
SOR751	00005430	15/Sep/2016	New Cross Hospital		EXPORT	
SOR745	00000550	24/Aug/2016	Royal Blackburn Hospital		EXPORT	
SOR752	00002020	15/Sep/2016	Royal Surrey County Hospital		EXPORT	
SOR750	00004470	15/Sep/2016	Salisbury District Hospital		EXPORT	
SOR733	00004510	06/Jul/2016	Scunthorpe General Hospital		EXPORT	
SOR749	00004735	15/Sep/2016	Southampton General Hospital		EXPORT	











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.

The screenshot shows a software interface with a top navigation bar containing various icons. Below the icons is a search bar with a "Submit" button. Below the search bar is a table with columns: SOR, Name, Account, Created, Name, Date, Show Delivery Note, Name, and Date. The table lists several sales returns with their respective details. A red box highlights the "I've chased this up" button in the last column of the table.

SOR	Name	Account	Created	Name	Date	Show Delivery Note	Name	Date
SOR753	Crystal Durrow	00001430	16/09/16	Dorset County Hospital	16/09/16	Show Delivery Note	I've chased this up	
SOR752	Sam Jones	00002020	15/09/16	Royal Surrey County Hospital	15/09/16	Show Delivery Note	I've chased this up	
SOR751	Pathy Lowes	00005430	15/09/16	New Cross Hospital	15/09/16	Show Delivery Note	I've chased this up	
SOR750	Michelle McQuillin	00004470	15/09/16	Salisbury District Hospital	15/09/16	Show Delivery Note	I've chased this up	
SOR749	AO: Janine Campbell	00004735	15/09/16	Southampton General Hospital	15/09/16	Show Delivery Note	I've chased this up	
SOR748	Jo Rhyon Curtin	10012969	13/09/16	Emergency Medical and Retrieval Transfer Service	13/09/16	Show Delivery Note	I've chased this up	
SOR747	Mark Elliott	00005130	05/09/16	Torbay Hospital	05/09/16	Show Delivery Note	I've chased this up	
SOR746	Foldan Cruz	00007885	05/09/16	Jamjoom Medical Industries	05/09/16	Show Delivery Note	I've chased this up	
SOR745	Ahani Suliman	00000550	24/08/16	Royal Blackburn Hospital	24/08/16	Show Delivery Note	I've chased this up	
SOR743	Loya Ward	00002824	09/08/16	Chelsea Westminster Hospital	09/08/16	Show Delivery Note	02 Sep 2016	Katie Evans
SOR742	Michael Baumann	00007515	09/08/16	Merivaara AB	09/08/16	Show Delivery Note	02 Sep 2016	Katie Evans
SOR741	Helen Clark	00001900	08/08/16	Gloucestershire Royal Hospital	08/08/16	Show Delivery Note	01 Sep 2016	Emily Hanson
SOR739	Silvia Nedeia	00006304	27/07/16	Artisana Medical	27/07/16	Show Delivery Note	01 Sep 2016	Emily Hanson
SOR737	Tommy Muirhead	00003560	13/07/16	Manchester Royal Infirmary	13/07/16	Show Delivery Note	01 Sep 2016	Katie Evans

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.

	Production	Production Schedule		 106
	CE Technical Files	CE Technical Files	1	 29
	Feedback	Company Innovation		 2
	Feedback	Customer Feedback Negative	6	 157
	Feedback	Customer Feedback Positive		 107
	Feedback	Product Feedback Negative	18	 403
	Feedback	Product Feedback Positive		 134
	Feedback	Product Innovation	1	 3
	Feedback	Systems Innovation		 2
	Feedback	VIAMED Feedback	1	 182
	Product Catagories	Oxygen Hoods		 9
	Product Catagories	Product Catagories		 1

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.

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
Customer GM Medical A/S *** See Memo ***

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

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.

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
GM Medical A/S
Blokken 11
3460 Birkerod
Denmark

Delivery
GM Medical A/S
Blokken 11
DK-3460 Birkerod
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 0881
Goods already supplied on SOR729

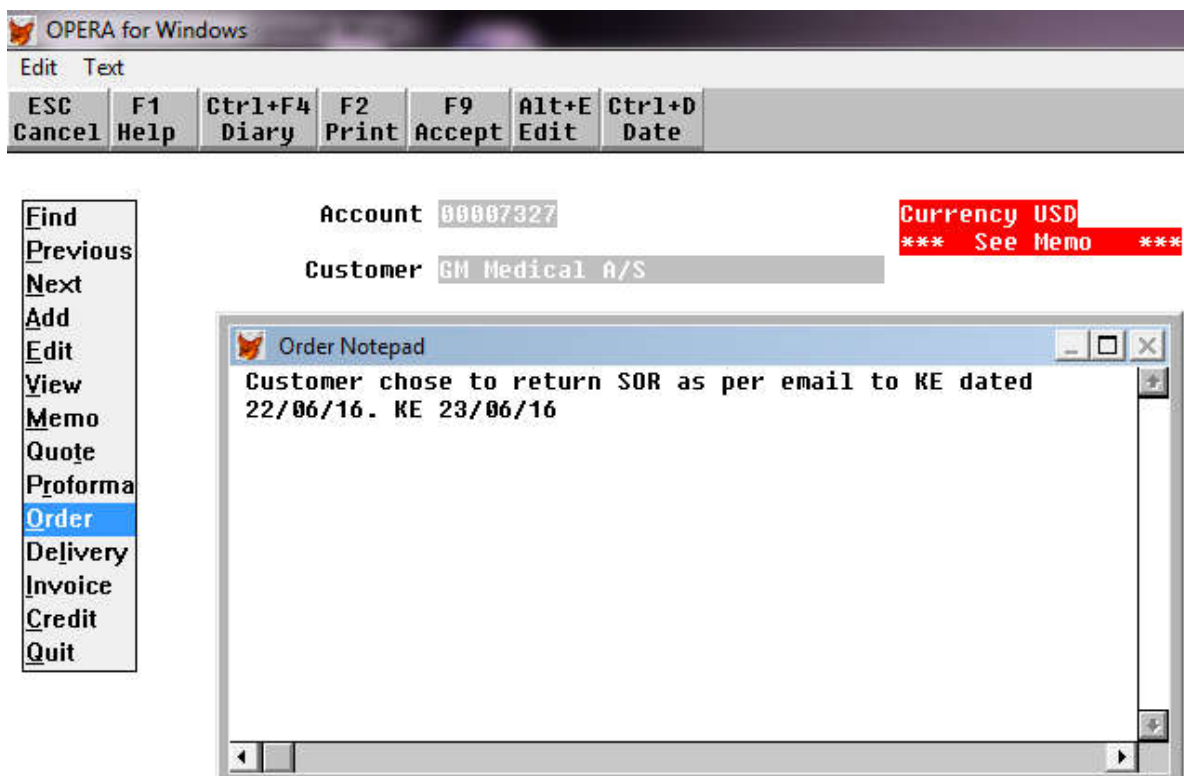
Analysis Currency Discount

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.
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.