

COMPANY OPERATING PROCEDURES				
Enquiries/Orders/Contract Review				
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CUSTOMER ENQUIRIES

1.1 Telephone Enquiries

- 1.1.1 If the Telephone, Fax or email) is used Viamed must assume the enquiry is urgent and any unnecessary delays could prejudice our existing goodwill and future business.
- 1.1.2 Record in your diary and/or Intrastats:-
Name : Department : Hospital;
Companies Name : Company Address
- 1.1.3 Enter into Goldmine

1.2 Technical Enquiry

- 1.2.1 If the enquiry is simple give answer - Use Data Sheets/Intrastats where applicable
- 1.2.2 Possible equipment failure, do a Warranty Check using the Stock Book/Intrastats .
- 1.2.3 If failed under warranty:
Small items e.g. sensors Offer replacement same day on no charge Invoice.
Customer to be informed that a chargeable invoice will be raised if on receipt no fault is found. Alternatively the customer must send goods to Viamed first. If a large item, ask for it to be returned. If customer is reluctant promise to send engineer or sales engineer as soon as possible.
If urgent Bleep or 'phone relevant person with regard to area normally covered.
Raise Intrastat Issue to relevant person.
Enter into Goldmine
- 1.2.4 For a non-warranty repair, request the customer returns items to Viamed or offer an on site visit.
Obtain Order number and any special instructions.
- 1.2.5 Where the enquiry is not readily answerable:-
Obtain Equipment Type, and general details of problem. Record in Diary/Intrastats:
Pass on to Engineer or Director.
When no answer can be given take Telephone number and pass written message on to MD/FD and/or relevant Engineer ensuring it contains the following: Date : Name : Department : Customer : Telephone : Equipment
Serial No: : Warranty Y/N : Description of fault.
Enter into Goldmine
- 1.2.6 Customer Returning Goods, Generate a SRS Number from Intrastats and fill in appropriate fields. SRS number can be quoted to the customer to place on packaging

1.3 Price Enquiries

- 1.3.1 Obtain prices from Opera (stock items)or Standard Price Guides or Intrastats .
- 1.3.2 Opera / Intrastats will be the most accurate for regularly supplied items.

1.4 Delivery Enquiries

- 1.4.1 Check Order number, outstanding orders, and estimated delivery dates.
- 1.4.2 Where delays are involved contact supplier for current status.

1.5 Product Information Enquiries

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

1.6 **Trials and Demonstration**

- 1.6.1 Depending on location offer to send in a sales person, time and place to be arranged by the sales person, Issue in intrastats to relevant person.
Enter into Goldmine
- 1.6.2 If an urgent trial is required (or awkward area i.e. John O Groats) and the equipment will go via post offer to send the item, preferably the same day depending current stock levels.
- 1.6.3 Inform the sales person responsible.
Where appropriate fill in the Intrastats Sale or Returns
Must be sent to a named individual
Must be for 14 days only without permission of Directors.

2. **LETTER AND FAX AND EMAIL ENQUIRIES**

- 2.1 Give COPY of letter/fax to person most fitted to answer.
File original in Hospital File.
- 2.2 Appropriate Copies of enquiry documentation to be sent to the sales person/engineer and the reply is filed in the Customer file.

3. **QUOTATIONS**

- 3.1 Written quotations can be prepared by any member of staff . Authorisation will only be by the Managing Director or Financial Controller or by designation the Office Manager, with a copy sent to the appropriate Sales Person.
- 3.2 Authorisation is required for quotes above a stipulated level set by financial director

4. **ORDERS**

4.1 **Telephone Orders**

All telephone orders must be recorded in Intrastats. At the time of recording the order, the office staff must check item codes and descriptions against manufacturers specifications. The callers full name and address and telephone number are recorded and the customer is asked to confirm the order to us. The order is then initialled, processed and filed to await confirmation. (See section 4.3).

- 4.1.1 Office staff generally take orders with reference to the Director or Engineer on technical matters, who will countersign the order .(Ref. Section 5.1)
- 4.1.1 Customers ordering Non -Standard or none Pt.No. specific items which are not covered by ISO9000 suppliers should be informed and give permission before order is accepted.

4.2 **Written/Faxed Orders**

All written/faxed orders are checked by the office staff and date stamped in.
(Ref. Section 5.1)

4.3 **If the order is a confirmation:-**

Look in the outstanding orders file under telephone orders, check the *photocopy* invoice.
Check the order Number

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Invoice Number

Hospital

Number of items are correct

Retrieve all other existing paperwork from the pink copies file and check the invoice address.

Paperwork has to be checked

4.4 If the Order is not a Confirmation

Check the quantity and which goods are required.

Any queries on the order; contact the relevant department and note the conversation on the order.

4.5 Internet Orders / Paypal.

- a) Enter Order Into Opera and Opera Order Printed – Signed and Checked by another member of staff. - Use the Paypal Reference as the Order Number
- b) The Contact/Customers details Added / updated in Goldmine.
- c) Confirmation Email confirming the order to be emailed to the customer.

5. CONTRACT REVIEW

5.1 After an order has been checked as in section 4.4, it is stamped 'Accepted' and initialled and the Office Staff then:-

- a) Order put onto Opera and Opera Order Printed Signed and Checked by Another member of staff.
- b) Picking is carried out by warehouse staff via Intrastats (see procedure VM/COP/06)
- c) Raise the invoice/despatch documentation,

5.2 The office staff then checks the invoice/despatch note set and initials it.

6. ORDER AMENDMENTS

6.1 Where an order is amended prior to picking the ongoing order will be endorsed with the amendment details, the name of the contact, the date, and the signature of the person taking the amendment.

6.2 If the amendment is after despatch, a separate order will be raised and the customer will be invoiced separately and, where appropriate, a Credit Note issued for unwanted items on the original order.

7 Review

7.1 A weekly review of outstanding orders and production schedules will be held via intrastats

7.2 Records will be kept