NEW ORDERS

1. Purchase orders will either be received by fax, post, email or telephone.
2. Enter OPERA, SOP, Processing.
3. Click on Find and enter the customer name in the Find box. Always search for the delivery address first and then check the invoice address is correct. As long as the Hospital / Company name and postcode are correct on both the delivery and invoice addresses the account should be right. If you are unsure ask.
4. Stamp the order with the Opera stamp and write the Opera account number and your initials in the stamped box.
5. Check the order has not already been inputted in the system by going into Invoices and then Orders looking at the Customer Ref. column, checking for the same purchase order number.
6. Before proceeding you must read any memos that are on the account.
7. If the order is not on the system, click on Orders, then press F5 New Order. "The Send Report to" box will appear, ensure the correct printer is selected, and then click on the Printer button and select "Main Warehouse"
8. Change the delivery address so it matches what is stated on the purchase order, with the department under the Hospital / Company name.
9. Enter the customer purchase order in the "Cust Ref box", if this is too long for the box put the end part in the "Cust Ref box" and reference the whole Order Number in the comments box. Add any additional comments specific to the order in the comments box and always put in the order contact name and telephone number.
10. Arrow down to the second page and enter the product code in the Reference box.
11. Enter the number of products ordered in the Quantity box, arrow down until the details appear in the Details box. If there are any differences or queries in the prices or part numbers the customer should be contacted and informed of the differences, notes should be written on the original paperwork then initialed and dated, also note should be added to Goldmine.
12. Normally, nothing will be entered in the boxes between the Quantity and Details boxes. However, if the customer is registered as VAT exempt, or the customer has a discount or a special price, then enter the details in the VAT code, Sell, or Line Disc box.
    a. If the customer is VAT exempt enter E in the VAT code box.
    b. If the customer has a special price enter the price in the Sell box.
    c. If the customer receives a discount enter the percentage of discount in the Line Disc box.
13. Once all the product details have been entered, the carriage details have to be entered. The goods will normally be sent by Post or our UPS Courier. On occasion customers will request different delivery methods.
14. If the goods are not urgent or heavy they will be sent by recorded delivery. The code to be entered in the Reference box is PPRD. As with all the carriage the quantity will always be one as. Then enter the cost of the carriage in the Sell box.
15. If the goods are of a higher value, large or heavy they will be sent by UPS. Use one of the codes PPUPS1 to PPUSP 8 which will be entered in the Reference box.
16. If the customer requires an urgent delivery before 9am, before 1pm or a Saturday delivery the goods can be sent by Special Delivery and the code is PPSD. The price for this will need to be given by Goods out.
17. Once all the details have been entered, press escape once so the F9 accept button appears on the top toolbar then press F9 accept. A Confirmation box will appear, click OK. If you are asked if you want to "Print Alignment" click no and "Print Another Copy" click yes. Two copies of the order are needed

18. The order number or ORD will need to be written in the Opera stamp on the original paperwork and both copies of the order clipped to the original paperwork.

19. Credit card orders should be treated the same, except a credit card slip need to be filled in and attached to the paperwork to be checked. The slip needs the long card number and start and expiry date, the security code for the back of the card, the company and card holders name. Also an Opera account number, date and initials.

20. The sale then need to be put into Goldmine, if the order contact is on goldmine put the sale here or create a new record. Then Complete – Sale, fill in the Product, code and result from the drop down lists, then put the order number and any other details in the notes box. Click OK.

21. The two copies of the order and the original paperwork should then be put in the "The Orders waiting Checking". Another member of staff should check the order, it is your responsibility to make sure the order is checked. Checking needs to be done as soon as possible. And any special instructions for Goods out need to be written on the order to be taken round and also put on the order memo. This is done by clicking on the order and the F12 Memo when complete F9 accept.

Checking the Orders

22. You need to check the ORD against the original paperwork. First check invoice and delivery addresses are correct, especially the postcode and department. As each part is check it should be ticked off on the order to ensure nothing is missed. Then the order number should be carefully checked because if this is wrong the hospital will not pay the invoice. Then each items part number and quantity ordered should be checked line by line. Finally the total should be checked.

23. Once the order is checked one copy should be attached to the original paperwork at the bottom right hand corner and stamped with the Checked stamp, initialed and dated. Once done it can be placed in the "Orders waiting Filing" tray. The second copy should be taken round to Good Out and placed in the Shipping trays.

24. If it is a Visa order the visa slip needs to be attached to the copy for Goods Out.