

VOP Operating Sub Process <u>Contract Review, Enquires, Office Processes</u>			
Created:	27/03/06	VOP 03	Issue 1
		See the Route Map for related ISO Standards.	Page 1 of 4

SCOPE

This procedure is established to describe the system used within the company for the Control of Contract Review, Enquiries and Orders. It is used in conjunction with the individual sub procedures, which show the relevant information necessary. The purpose of this procedure is to describe the system in use at the company for the orders, review and processing of all Sales.

RESPONSIBILITIES

It is the responsibility of the Managing Director, to ensure that the contents of this procedure, and related procedures, and sub processes are adhered to.

OBJECTIVES

It is the Objective of this VOP to demonstrate the handling of Contract Review, Enquires, Office Processes. How different types or order or enquiries are handled within the companies.

CUSTOMER ENQUIRIES

Telephone Enquiries

If the telephone is used we must assume the enquiry is urgent and any unnecessary delays could prejudice our existing goodwill and future business.

Intrastats need to be updated with the name, department, hospital, companies name, company address, email, telephone and any further contact or company details.

Technical Enquiry

If the enquiry is simple, give the answer, almost all information is in available in Intrastats the majority of the time, you can also use leaflets and data sheets. Where the enquiry is not readily answerable obtain contact details, equipment type, serial number and the general details of query or problem. Record the details in Intrastats and then pass the query to an engineer or director.

If they are not available or no answer can be given, take the contact details, telephone number, email address, name, department, company / hospital, equipment, serial number, warranty, description of fault. Then create an Intrastat issue to the relevant sales or technical manager if available, or director.

For possible equipment failure, do a warranty check using the stock book in Intrastats, check the serial number and part number. If goods are to be returned generate a Service Returns Sheet (SRS) so the customer can quote this on the return. Fill in as many details about the customer and the return as possible. Tell the customer we will raise a chargeable order to be sent with the replacement item(s), a note saying these are replacement items should also be added to the memo on the stock line. Then when the goods are received a credit will be raised and sent to the customer. If the goods are not received then the customer is expected to pay for both orders. This helps to ensure the goods are returned back to us.

VOP			
Operating Sub Process			
<u>Contract Review, Enquires, Office Processes</u>			
Created:	27/03/06	VOP 03	Issue 1
		See the Route Map for related ISO Standards.	Page 2 of 4

It must quote the SRS and SRN numbers on it and on receipt of their item/s it will be booked in and tested. A request for credit will be raised with the Accounts Controller, which will then be to the customer. This ensures that goods are returned to us for review.

Price Enquiries

Obtain prices from Intrastats, this includes quantity discounts prices and carriage.

Delivery Enquiries

Check the order number, outstanding orders and estimated delivery dates. Exercise caution when giving out delivery dates. Where delays are involved review the Purchase order page for expected delivery dates.

Product Information Enquiries

For most products, the information will be in Intrastats, you can also review leaflets and data sheets. For complex queries pass to the sales or technical manager.

Trials and Demonstration

If a customer requests a trial, refer to the relevant sales personnel, add an issue in Intrastats. Enter the details into Intrastats contact management. The sales person dealing with this should then fill in the Intrastats Sale or Returns / Issue. These must be sent to a named individual. These Sale or Returns should then be followed up in a timely manner.

Email, Letter and Fax Enquiries

Forward the email on to the relevant person/s, if you are unsure they can be cc'ed to more than one person, but if you are unsure ask.

Give letters to the addressee or person most suitable.

Faxes will come in by email and should be forwarded as above. If its a payment notification this should be forwarded to accounts, as well as sales. The copy is attached to the customer order in Intrastats.

QUOTATIONS

Verbal quotations can be given over the phone and written quotations can be prepared by any member of staff, authorisation will be by a director and is required for quotes above a stipulated level set by financial director. This is currently £10000.00. Intrastats contact management should be filled in and if needed the stock item ticked.

CONTRACT REVIEW

VOP			
Operating Sub Process			
<u>Contract Review, Enquires, Office Processes</u>			
Created:	27/03/06	VOP 03	Issue 1
		See the Route Map for related ISO Standards.	Page 3 of 4

Orders received will be put on to Intrastats and the customer paperwork attached. With any other relevant paperwork, including payment notifications and VAT exemptions. After an order has been put on the system it is checked by another member of staff. Before it can be picked.

COVID19 or any other national or international crisis.

During these times, those staff who can, will work from home. Orders will be entered and checked by staff digitally against the uploaded customer order. Goods out can print out the checked confirmation sheet from Intrastats.

Picking is carried out by warehouse staff via Intrastats. Then the invoice and dispatch documentation is generated and accessible from the system.

ORDERS

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 and stock levels. The callers full name, delivery and invoice addresses, email, telephone and order number are recorded and the customer is asked to confirm the order to us. Any further contact is to be noted and information added to Intrastats. The orders are checked by another member of staff. These then appear on the Active list for Goods out.

Written, emailed or faxed orders

The office staff must check item codes and descriptions against manufacturers specifications and stock levels. The customers full name, delivery and invoice addresses, email, telephone and order number are recorded. Any further contact is to be noted and information added to Intrastats. The orders are checked by another member of staff. These then appear on the Active list for Goods out.

Internet Orders, Ebay and Paypal

Enter order into Intrastats, as above. Use the Paypal reference as the order number. Add any payment documents to the order in the system.

If the order is a confirmation

Check if the Order has already been processed in the system.

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 memo in Intrastats.

VOP			
Operating Sub Process			
<u>Contract Review, Enquires, Office Processes</u>			
Created:	27/03/06	VOP 03	Issue 1
		See the Route Map for related ISO Standards.	Page 4 of 4

Confirmation Email confirming the order are sent to export customers, orders received by email and others that confirmation has been requested. Delivery notifications are also sent where possible.

Customers ordering none standard or none part number specific items, which are not covered by the most up to date version of ISO 9001 and 13485, from suppliers. Need to be informed and give permission, before order is accepted.

ORDER AMENDMENTS

Where an order is amended prior to picking, the ongoing order will be updated with the amendment details, the full name of the contact, telephone number and of the person making the amendment. The notes on the active list are added / updated. So goods out informed.

All order amendment details, must be entered into intrastats, customers full name and address to be checked. Ask the customer to confirm the amendments via email.

If the amendment is after dispatch, 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 upon return of the goods.