

## VM3COP20.31 - Viamed Export Order Processing Procedure

**We CANNOT sell any items to the following countries (See VM3COP20.053):**

Syria  
Iran  
Cuba  
North Korea  
South Sudan  
North Sudan  
Republic Sudan  
Myanmar  
Crimea – Region of Ukraine.

*Consult with the International Sales Manager if you receive any enquiries*

**We CANNOT sell products from the USA (Teledyne, Maxtec, Posey, etc) to the following countries:**

Cuba  
Iran  
North Korea  
Sudan  
Syria  
Libya

*Consult with the International Sales Manager if you receive any enquiries*

USA – direct enquirer to the original manufacturer

**Products we CAN sell to the USA:**

V1000 Foetal Heart Simulator

**Things to remember:**

- Check if customer is a proforma or account customer
- If pre-payment has been made, make sure you attach copy to 'Payment Notification if applicable' and click 'Order Prepaid'.

Order Prepaid ☐

**NEVER** accept a credit or debit card for export orders unless instructed to do so by the accounts department. Please note, we cannot accept American Express cards under any circumstances.

- How are they paying? Do you need bank or PayPal charge?
  - PayPal charge is 6% of the proforma/order total
  - Bank charges are \$25 as standard, if paying in Euros there typically are no bank charges – check account memos
- Insurance is 1% of goods total
- Correct Incoterms (EXW for customers own account, CIP/CPT for courier that we arrange on customers behalf, not including UPS)
- EXW need customer courier account number and service required (where applicable) on ORD
- If turning a proforma into an order, write box size in the 'Notes' section
- Check if any documentation is needed, speak to International Sales Manager if unsure.
- UPS require a post/zip/area code for all orders
- The contact on the order must be the individual contact's name, not the company name
- Applicable account memos must be written in the 'notes' section when processing.

# Telephone Order ID 5447

Contact Name Caroline Aplin  
Contact Department:  
Contact Email: 500005130@talkemail.com  
Contact Telephone: 01803 655458  
Contact Address:  
**Delivery Address**  
Torbury Hospital  
Stoke Newington - Medical El.  
Laves Way Drive  
Devon  
Torquay  
TQ2 7AA

**Invoice Address**  
Torbury & South Devon NHS  
Foundation Trust, Accounts  
Payable Dept, Regent House  
Regent Close  
Torquay  
TQ2 7AN  
01803 653393

Order Notes:  
3X D021013  
Order Number:  
1204291  
Credit Card Details:  
Card Name  
Name On Card:  
Card No. \*\*\*\* \*  
Card Type:  
Issue Number:  
Security Number:  
Start Date:  
End Date:  
Registered House number  
Registered Post Code

Please see VM3COP27.29 for details on how to take a telephone order.

[illegible]

Please remember to acknowledge the order and advise of expected dispatch date by email if an email address has been supplied, or by fax if no email address is available on the purchase order or IntraStats Customer Relationship Management (CRM) system.

Google

Gmail -

Compose

1-1 of 1

PECOS eProcurement Purchase Order GMPN942666 - Attached are documents related to purchase order GMPN942666

09:54

Info

More

Compose

Purchase Order GMPN942666

Info

PECOS eProcurement <support@elcom.com>  
to Viamed <>

Attached are documents related to purchase order GMPN942666

pocprint.pdf

Click here to Reply, Reply to all or Forward

14.8 GB (14%) of 100 GB used

Terms Privacy

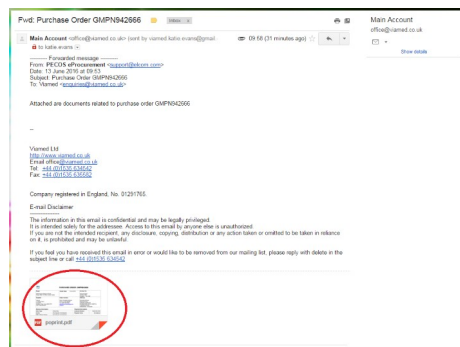
Click the

Click the arrow on the right and click forward.

The screenshot shows a Gmail inbox with an email from PECOS eProcurement. The email is addressed to katie.evans@viamed.co.uk, which is circled in red. The email content includes a forwarded message about a purchase order and a PDF attachment. The Gmail interface shows the search bar, navigation links, and a toolbar at the bottom.

Type your vmsecure into the 'To:' field and click send.  
E.g. [firstname.lastname@vmsecure.me.uk](mailto:firstname.lastname@vmsecure.me.uk)

When the email arrives in your inbox, click on it to open it.



Click on the attachment, where provided, to open it.



Click the download button at the top of the page and open to view contents. Please be aware of where this is downloaded to as you will need it later to upload to the order processing page.

Follow the steps on VM3COP20.16 for eBay for downloading the documents then following the order processing procedure below.


## Order Processing

From IntraStats, using the drop down menu at the top right of any screen, click the arrow and select 'Contacts', in the Search box type the name of the Company you wish to process the order for. Use the following buttons to open in current tab, new tab or to look up search histories or saved searches.




Click the hospital/company name you are processing the order for. Any line highlighted in green is an account which has been used recently within the new system.

For example Merivaara...

| Hospital / Organisation Names |  |                    |  |              |             |       |                |                     |                              |
|-------------------------------|--|--------------------|--|--------------|-------------|-------|----------------|---------------------|------------------------------|
| - HOST COMPANY                |  |                    |  |              |             |       |                |                     |                              |
|                               | Customer   | Customers Company  |  |              |             |       |                |                     |                              |
| <input type="checkbox"/>      |  Viamed | CID3975 / 00007515 |  Contacts #10 | Merivaara AB | Helsingborg | 25442 | 0046 862 72950 | Company Distributor | Credit Credit C Extra Search |
| Request Merge Companies       |  |                    |  |              |             |       |                |                     |                              |

This will open up a page similar to this:

























**Merivaara AB**  

 CID3975 Opera 00007515 Type:Company Distributor  
 Merivaara AB Hävertgatan 21, , Helsingborg, , 25442, Sweden  
 Tel 004686272950 Log Call  
 Credit Credit C VAT SE556616030401

Account Home
Main Details
Account Memos
Sales History
Stock References
Customer Returns
Service Visits
Distributor Agreements
Documents Files
Linked Issues
Regulatory Agreements


CONTACTS

Add New Contact
Merge Contacts
Hidden/Removed Contacts

| Contact | Sales Order   | Purchase Order | Contact Actions   | Department | Position | Direct Phone | Email                      | Head of |
|---------|---|----------------|---|------------|----------|--------------|----------------------------|---------|
| No Name |  Viamed Add S.O. |                |           |            |          |              | info@merivaara.se          | [X]     |
| No Name |  Viamed Add S.O. |                |           |            |          |              | sales.sweden@merivaara.com | [X]     |

On the order PDF, find the contact name. If this can not be found, use the name at the bottom of the email. Then find this name on the company/hospital list on Intrastats and click the Add S.O. button to the left of the name.

This opens the customer order processing page, it will also show you the order number beginning, CVM (for Viamed orders)  
CAN (for Vandagraph orders)  
CST (for VST orders)



Vendor 800235  
**VIAMED LTD**

Recipient  
**Merivaara AB**  
**Hävertgatan 21**  
**25442 HELSINGBORG**  
**SWEDEN**

Purchase order

Date .....: 3.5.2022  
Number .....: 00010682\_048-1  
Page .....: 1 / 1  
Last confirm. date .....: 10.05.22  
Reference .....: Helsingborg  
Delivery terms .....:  
Mode of delivery .....:  
Delivery date .....: 3.5.2022  
Terms of payment .....:  
Currency .....: EUR  
Contact person .....: Wennerström, SEC, NOC

Invoicing address  
**Merivaara AB**  
**Hävertgatan 21**  
**25442 HELSINGBORG**  
**SWEDEN**

| Item number        | Description and drawing no | Quantity | Unit | Price/unit. | price per | Disc % | Line amount | Dlv. date |
|--------------------|----------------------------|----------|------|-------------|-----------|--------|-------------|-----------|
| 0012166            | VM-2160 SMARTsat           | 4,00     | St   | 245,000     | 1         |        | 980,000     | 3.5.2022  |
| FxSalesItemTemp-00 |                            |          |      |             |           |        |             |           |



If the 'Add S.O.' button does not show,  
please follow these steps:




1. Go to Main Details page, and check that there is a 'Price List to Use' selected.



2. Edit the contact who you want to assign the order to, scroll to the bottom of the page and check that 'Allow Sales Order' is ticked.

3. Scroll to the top of the page and click 'Update Details Below' button.

Depending if this account has been used before, you may be required to fill in some additional information, see below:



# Viamed Customer Order CVM127068

DELETE Order  
127068

**Viamed Account - Please Fill in the Following:**

---

## Main Details

|                               |                                   |
|-------------------------------|-----------------------------------|
| Opera_Region                  | <input type="text"/>              |
| Opera_Territory               | <input type="text"/>              |
| Opera_Cust_type               | <input type="text"/>              |
| Opera_Price List              | <input type="text" value="0001"/> |
| Opera I Account if applicable | <input type="text"/>              |
| Vat Number                    | <input type="text"/>              |

0001 - UK GBP End User

Returning to create the order you are processing, please make sure all fields are completed:

|                                    |                                 |  |
|------------------------------------|---------------------------------|--|
| Order id                           | #128717                         | This can be Order, Proforma or Quotation                                     |
| HOST COMPANY                       | Viamed Customer                 |  |
| Order Type                         | Customer Order ▼                | Click this if payment has been received, make sure you upload document below |
| Order Prepaid                      | <input type="checkbox"/>        |  |
| Card Payment                       | <input type="checkbox"/>        |  |
| Contact Name                       | ▼                               | Click this if a card payment is required                                     |
| End User If Known                  | ▼                               |  |
| Customer Reference                 | <input type="text"/>            | When a customer reference is added, the below will appear:                   |
| Customer Reference Extra Line      | <input type="text"/>            |  |
| Customer Contact Tel               | <input type="text"/>            |  |
| Customer Order PDF                 | Please Enter Customer Reference | Choose file No file chosen<br>Upload File                                    |
| VAT Exempt Certificate No          | Please Enter Customer Reference |  |
| Payment Notification if applicable | <input type="text"/>            | Upload document here, if payment Has been received                           |
| Proof of Export (If EXW)           | <input type="text"/>            |  |
| Order Priority                     | 0 ▼                             | See page 13  |
| Due Date                           | 09/02/2021                      | See VM3COP03.04 for definitions  |
| Inco Terms                         | ▼                               | See the following page for definitions                                       |
| Destination or Consigned Place     | <input type="text"/>            |  |
| OUR Staff Name FOR Paperwork       | ▼                               | IncoTerms Destination (see following page)                                   |
| Part Ship Allowed                  | <input type="checkbox"/>        | Select the person processing the order                                       |
| Ship Early Allowed                 | <input type="checkbox"/>        |  |
| Hold / Stop Invoices being sent    | <input type="checkbox"/>        |  |
| Hold Picking                       | <input type="checkbox"/>        |  |

Make sure any telephone numbers above do not have any spaces.

*Account Memos* - Check if there are any account memos for this order, this can be found by hovering over the text "Account Memo (Hover to read)" at the top of the screen.

**Account Memo (Hover to read)**



## **Incoterms**

### **EXW – Ex-Works**

These are shipments which once they have been collected by the courier and have gone over the threshold of our premises they are the responsibility of the buyer, for example UPS (own account only), DHL, Kuehne + Nagel. Destination is the location the courier is to collect i.e. Viamed Ltd.

“Destination or Consigned Place”: Viamed Ltd.

### **CPT – Carriage Paid to**

Any liabilities are passed to the buyer as soon as it leaves Viamed’s premises with the appointed courier. Examples of this type of shipment are UPS and Royal Mail where Viamed has contracted the courier and is paying the invoice from the courier for the service. This is where we list a carriage cost on the order, unless already included in the price of the product i.e. Posey Wraps within the UK.

“Destination or Consigned Place”:

Place of Destination (agreed location to which a shipment is expected to arrive).  
e.g. Barcelona, Spain or Leeds Bradford Airport, United Kingdom

### **CIP – Carriage and Insurance Paid**

Any risks are passed to the buyer as soon as it leaves Viamed’s premises with the appointed courier. Examples of this type of shipment are UPS and Royal Mail where Viamed has contracted the courier and is paying the invoice from the courier for the service. This is where we list a carriage cost on the order, unless already included in the price of the product i.e. Posey Wraps within the UK.

The difference between CPT and CIP is that insurance is listed and charged to the customer on the invoice to cover the shipment. (Stock code INS is 1% of total of goods).

“Destination or Consigned Place”:

Place of Destination (agreed location to which a shipment is expected to arrive).  
e.g. Barcelona, Spain or Leeds Bradford Airport, United Kingdom

## **Carriage / Delivery Codes**

Priority 1 – Urgent order to be processed immediately (only to be used when the purchase order/customer states it is urgent or MUST be shipped same day)

Priority 2 – Courier other than UPS or Royal Mail

Priority 3 – UPS – all services

Priority 4 – Royal Mail – all services

## **Carriage Charges**



To establish which courier to use, check the Account Memos and previous invoices.

To find previous invoices, return to companies CRM page click the ‘Sales History’ button, then scroll to the first invoice number and click the PDF icon.

| Download Excel |                |                          |               |                                       |                            |        |      |        |            |            |            |
|----------------|----------------|--------------------------|---------------|---------------------------------------|----------------------------|--------|------|--------|------------|------------|------------|
| Order          | Customer Ref   | Order Confirmation       | Delivery Note | Tracking                              | Invoice                    | Goods  | VAT  | Total  | Paid Flag  | Matched ID | Amount Rec |
| 135971         | 00010633_048-1 | CVM135971<br>15 Mar 2022 | DVM135971-1   | 16 Mar 2022 UPS<br>1Z9W96386877088300 | RVM135971-1<br>16 Mar 2022 | 587.15 | 0.00 | 587.15 | Check Xero |            |            |

On this invoice it showed that PPUPS – UPS Standard was used:

|        |   |       |      |       |
|--------|---|-------|------|-------|
| PPUPS6 | UPS Courier Delivery - Standard<br>1z9w96386877088300 | 41.75 | 0.00 | 41.75 |
|--------|---|-------|------|-------|

Enter the required price into the 'Unit Price' box, leave blank if the carriage is to be added by goods out, click 'Add to Order' to complete the line.

If you are unsure of which courier to use or of how much carriage to charge, check the IntraStats memos or check with colleagues in the office / Goods Out department.

All export orders are shipped via UPS unless advised otherwise by the account memo.

For customers with a credit account, enter the 'Stock Item' as 'PPUPS6' for delivery addresses in the EU or 'PPUPS7' for delivery addresses outside of the EU. Enter the quantity as 1 and leave the 'Sell' box empty and click 'Add to Order'.

PPUPS6 refers to UPS Standard service which is not always available outside of the EU, check Account Memos and previous orders for correct UPS service.

Should you be processing a proforma or quote for a customer, please refer to VM3COP20.35 UPS Calculator on how to calculate delivery charge.

On standard orders, where carriage is not calculated, ENSURE you add notes to the 'Notes' box to say, 'Carriage to be added'.

## Invoice and Delivery Address

From the purchase order please select, using the white circle radio button to the left of the line, the correct invoice and delivery addresses from the list provided.

Should the relevant address not be included please click 'Add Invoice Address' or 'Add Delivery Address', this will refresh the page and provide you with fields to input.

| Invoice Addresses        |          |          |          |      |          |         |
|--------------------------|----------|----------|----------|------|----------|---------|
| Add Invoice Address      |          |          |          |      |          |         |
| NHS Trust / Company Name | Address1 | Address2 | Address3 | City | PostCode | Country |
| <input type="radio"/>    |          |          |          |      |          |         |

## Check Stock Quantities

Using the drop down menu to the top right of any IntraStats screen. Click the arrow and select 'Stock', in the search box for the part number and click the relevant icon, as below.

Current Tab

New Tab

Search History and Saved Searches

Stock





When you have found the product code you require, click on the BOX icon to display the current stock levels.

If there is no stock, please make sure you inform the customer and provide a lead-time, where possible. If alternatives are available you may provide them with these options also.

You should also check the '£' page and check if the item requires a carriage charge. Currencies and customers that qualify for free carriage have a statement highlighted in blue next to their price.

For distributor and automotive carriage charges, see VM3COP20.34

Check these details for all products listed on the purchase order.

If these details are incorrect or if applicable carriage charges have not been added to the purchase order, return to the order processing page and change the priority to '8', please contact the customer before proceeding. Contact the customer by telephone, if possible, but email if they are unavailable. Please add any correspondence or notes to goods out on the notes section.

## Order Notes

Add any notes in the orders notes text box on the order processing page of any contact you have had with the customer and their response. If the customer accepts the changes and is happy to proceed, change the priority back to the appropriate number and proceed to checking.

**Note:** ALL orders must be entered into IntraStats even if awaiting action so please continue adding the order by following this procedure but leave on a priority 8 until agreed with the customer to proceed.

## Adding Stock

When you are satisfied that all the prices and carriage charges are correct, return to the customers CVM in IntraStats and proceed as follows. Make sure you leave on a priority 8 if you are still waiting for confirmation from the customer.

Enter the part number in the 'Add Stock Item to Order' box.

Should there be no part number, items can be added in the 'Descriptive Item' box.

Enter the quantity required, please note the price should change accordingly if quantity discounts are available. Leave the due date unless you have different requirements per line. As this is set by the overall 'Due Date' at the top of the page.

Ensure the pricing and quantities are correct before proceeding. When confirming a price discrepancy on a purchase order, we must ensure that we advise the customer whether the price is simply incorrect or whether a price break applies to the quantity that they have ordered.

Once happy all information is correct, click 'Add to Order'.

| PriceList | Stock Reference | Description                    | Quantity On Order    | Unit Price                            | Due Date                                | Add To Order                                      |
|-----------|-----------------|--------------------------------|----------------------|---------------------------------------|---|---|
| 0001      | 0110017         | Teledyne Oxygen Sensor R-17MED | <input type="text"/> | <input type="text" value="\$ 42.00"/> | <input type="text" value="09/11/2020"/> | <input type="button" value="Add to Order 42.00"/> |

When all items on the purchase order have been entered, the carriage must be added.  
*All Viamed orders must include a carriage line.*

## Bank Charges

If the customer is paying in USD's the standard bank charge is \$25 unless the memo states otherwise. Customers paying with EUR's do not get charged a bank charge.

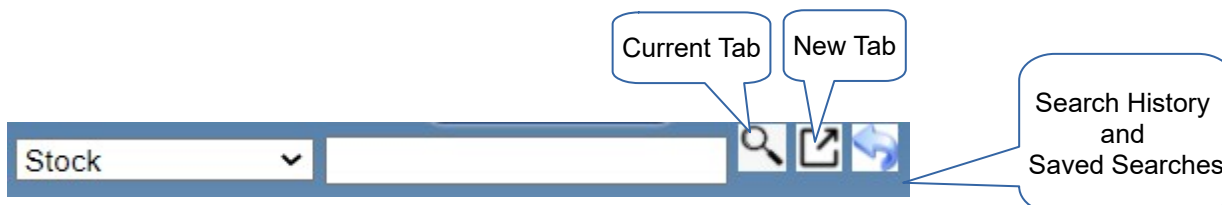
Use the 'Reference' BC, the description will automatically change to 'Bank Charges'. If the customer is paying with PayPal, use reference 'Paypal', see page 14 to calculate PayPal charge. Enter the 'Quantity' as 1 and add the appropriate charge to the 'Sell' box. Click 'Add to order'.

## Insurance

Next, enter the insurance. Unless advised otherwise by the memo, all customers require insurance. In the 'Reference' box, type 'INS', the description will automatically change to 'Insurance', enter the 'Quantity' as 1 and amend the '\*\*\*\*' box to 1% of the total goods value. E.g. if the customer orders \$600 or €600 of products, the insurance charge would be \$/€6.

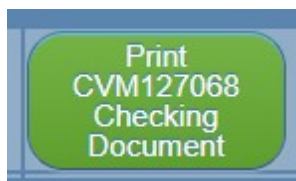
## Stock Memos

To check a stock memo, use the drop down menu to the top right of any screen. Click the arrow and select 'Stock', in the search box for the part number and click the relevant icon, as below.



Type in the part number or description required and click the new tab icon so that it opens the stock search in a separate tab.

**M** Click the large M for 'Memo' against the part number you require and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.



## Proofing / Checking Order / Error Amends

When you have all of the products and one carriage line entered into IntraStats, click 'Print CVM\*\*\*\*\* Checking Document', this will generate a PDF of the order. Check that all information is displayed correctly.

Should there be any errors click the back button on your browser and amend then repeat the step.

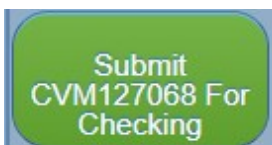
| Item Reference | Description                            | Quantity | £ Unit | £ Unit Vat | £ Total |
|----------------|--|----------|--------|------------|---------|
| PPRD           | Delivery - Royal Mail 1st Class Signed | 1        | 0.00   | 0.00       | 0.00    |
| 0110017        | Teledyne Oxygen Sensor R-17MED         | 1        | 42.00  | 8.40       | 50.40   |



If the carriage line is not situated below all the products on the order, return to the order processing screen and click the arrow at the end of the carriage line, this will move that line to the bottom of the order.

Once happy that the PDF is all displayed correctly, click the back button and this shall return you to the order processing page.

## Submit for Checking



Now the order is ready for checking, click the 'Submit CVM\*\*\*\*\* for Checking' button and this will add the order to the list for checking. Send a Skype message to 'Viamed Order Checking' or 'Viamed Employees' group stating the CVM number and ask for someone to check. See VM3COP20.32 Order Checking for this process. Once checking has been completed, it will appear on the 'Active List' for goods out to process.

## Large Value Order

If the order totals £10,000 or more, a director's sign off is required. Locate a director and ask them sign off on the system.

## Order Acknowledgement

Acknowledge the order and advise customer of dispatch date, if requested or provide lead time should the items be currently out of stock.

Should an item be out of stock, check if there is an outstanding PO with supplier. This can be found in "Suppliers Back Order Status".

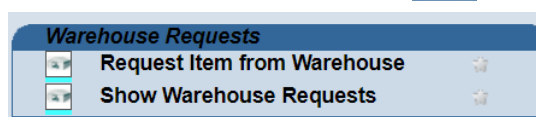
| Suppliers Back Order Status          |            |         |              |               |                 |               |             |                      |  |                   |                   |                      |                           |
|--------------------------------------|------------|---------|--------------|---------------|-----------------|---------------|-------------|----------------------|--|-------------------|-------------------|----------------------|---------------------------|
| Outstanding Orders as of Mar 21 2022 |            |         |              |               |                 |               |             |                      |  |                   |                   |                      |                           |
| Host                                 | Supplier   | P.O.    | Date Ordered | Date Required | Order Confirmed | Estimate Ship | Part Number | Supplier Part Number | Description  | Quantity Required | Quantity Received | Quantity Outstanding |                           |
|                                      | Maxtec Inc | PVM2434 | 11 Mar 2022  | 11 Mar 2022   | 14 Mar 2022     | 26 Apr 2022   | 0310291     | "R229P01-024"        | MaxBlend 2 (NIST) Low Flow Blender-15 lpm flow meter | 2                 |                   | 2                    | <a href="#">Add Watch</a> |
|                                      |            |         |              |               |                 |               |             |                      |  | 2                 | 0                 | 2                    |                           |

If you click "Add Watch" you will be notified should the delivery date be amended. Please inform the customer of any estimated delivery date and updates, where necessary.

If there is no stock on order, please raise a warehouse request. Click



Go to "Request Item from Warehouse"  
List items requested, also include order number in notes box. Click "Add".



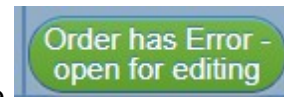
## Editing an Order

If an order needs editing, for example, if the priority needs to be changed, click the 'Opera Data' icon in IntraStats and click 'Outstanding Customer Orders'. This will take you to a full list of orders being processed through the system.



Locate the order you want to edit and click the 'Details' button, this will open the order processing page as before.

To be able to edit, click the 'Order has Error – open for editing' button. Enter the reasoning for editing the order and click 'Confirm Open Order for Editing'. This opens the page so it is now editable then make amends as required. Should you wish to remove a line from the order, you must amend the quantity to 0 and refresh the page.



If the date on an order is changed, please check that the product lines have also updated. For example, if an order is put on as a forward date and then you edit the date after, the date will remain the same and Derek has to change this.

Once an order has been edited, it must be rechecked – following the steps in section 'Submit for Checking' section (page 11).

## VAT

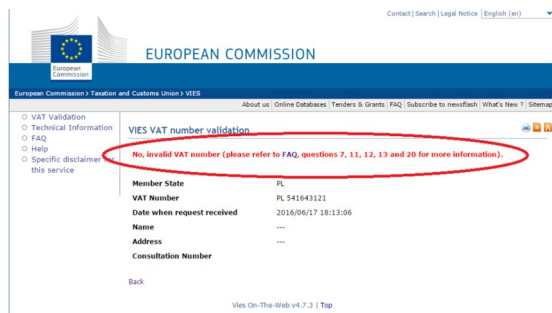
We do not charge VAT on any orders being shipped outside of the UK. Any duties and taxes will be charged to the recipient before they can be received.

**VAT E** Ensure the VAT is removed from product and carriage lines. To do this, click the box in the 'VAT E' column against the relevant line.

 For couriers, if available, customers are requested to provide VAT numbers. Once received, navigate to [http://ec.europa.eu/taxation\\_customs/vies/vieshome.do](http://ec.europa.eu/taxation_customs/vies/vieshome.do) on your browser.

In the 'Member State' box, click on the appropriate country, using the first two characters of the V.A.T. number to guide you. Click 'Verify'.

If the V.A.T. number is correct, this message will be displayed. Print this and keep with the customer purchase order.



If the V.A.T. number is incorrect, you will receive this message. Send a copy of this to the customer and advise them that their VAT number is incorrect. Ask them for the correct version, if a valid V.A.T. number cannot be provided, ensure V.A.T. is charged.

## Priority 1

If the purchase order states that the order is urgent, ensure stock is available and call the customer to ask which date they need the order for. If they need it the next day or you are unable to contact them, set the priority as '1'. Ask a director to sign off on the system. Add memo to the order stating: 'When order picked inform: \*Your name\*.'

Once checked, inform Goods Out that there is a priority 1 order on the system.

## Discounts

If an order has a discount applied or has any free of charge items/carriage (lines which would normally be chargeable), ask a director to add note to the order notes before proceeding to the checking stage.

## PayPal

On occasion, a customer may wish to pay via PayPal. Should this occur, add a line above the carriage line. Use reference 'PAYPAL', and calculate 6% of the total cost of the order including VAT (excluding this PayPal charge). Add this calculated charge to the 'Unit Price' box.

E.g. Products totalling £650 with a £10 carriage charge would equal £792 including VAT. The PayPal charge would be 6% of the total including VAT therefore the PayPal charge in this example is £47.52.



Should you need to insert a line you will need to reorder the lines click the arrow at the end of the line, this will move that line to the bottom of the order.

If no PO number is provided click the 'Non given' button next to customer reference and the system will automatically generate one for you.

## Western Union Payments *(Check with accounts before offering to customers)*

On occasion, a customer may wish to pay via Western Union. Should this occur, add a line above the carriage line. Use reference 'Bank Charges', amend the description to 'Western Union Charge'. The charge is £15, add this to the 'Unit Price' box.

Note: The customer will need the full name, including any middle names, of the person who collects the payment; this would normally be Helen. Helen's full name is Helen Jean Lamb, please ensure the customer uses this when making their payment.

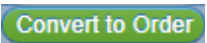
## Additional Notes

If a PO has two or more lines of the same part number, the system will automatically group them together per sales value, for example an order for 2 x R-17MED plus 3 x R-17MED (chargeable) plus 1 x R-17MED (free of charge) will show on the invoice as 5 x R-17MED (chargeable) and 1 x R-17MED (free of charge).

For orders that are solely for calendars or posters, add notes to order processing page stating to ship with next order unless agreed by director.

## Converting Proforma/Quotation to Order

Once payment has been received or quotation accepted with a purchase order being received, find the order on the 'Customer Sales Orders' page and click the details button. This will open the order processing page. Scroll down the page until you see the green buttons and click 'Convert to Order'. Check all information is correct and re-submit the order for checking.

A green button with the text "Details" in white.A green button with the text "Convert to Order" in white.

## Deleting Orders



Should a quotation/proforma/order need to be deleted, please be aware these are not retrievable and would require re-entering should you delete it. At the top of the customer order page click the 'DELETE Order \*\*\*\*\*' button. Please enter the relevant reason for deletion and click 'Delete \*\*\*\*\*'. Once deleted you will need to start a new sales order.

## Proof of Export

Proof of export can be added at any stage:

- Goods Out can upload shipping document  
i.e. airway bills or proofs of collection
- From the customer or shipping company.

The CVM can have documents added even after it has been invoiced.

Customers who want EXW with companies we do not deal with often will need to send proof of export.

- UPS: We do not require this as we have an account from them.
- TNT / FEDEX: We have an airway bill and proof the driver has picked up.