VM3COP27.30 - Catalog 360 Circle e-Procurement System

Navigate to https://circle.catalog360.com and click "Sign In to the Circle"
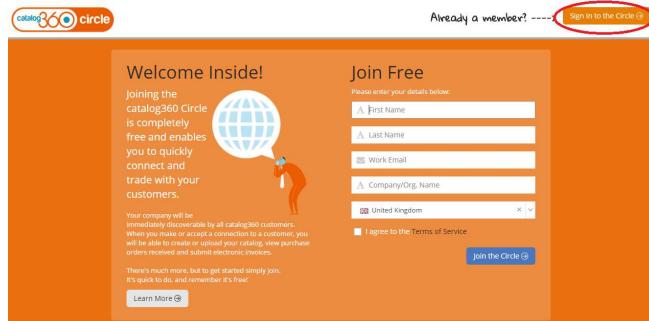
The username is: orders@viamed.co.uk and the current password can be found in GoldMine notes under the contact Stewart Childs at company, Catalog360 Ltd.

Click on "Orders"
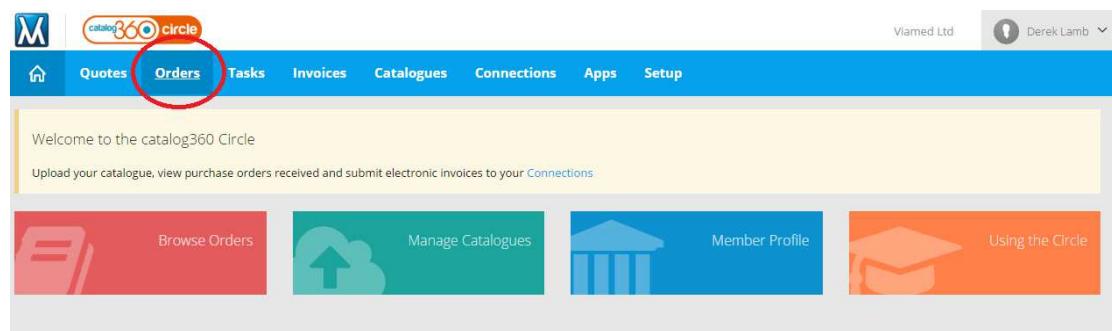
Select the hospital name – currently only Luton & Dunstable use this system
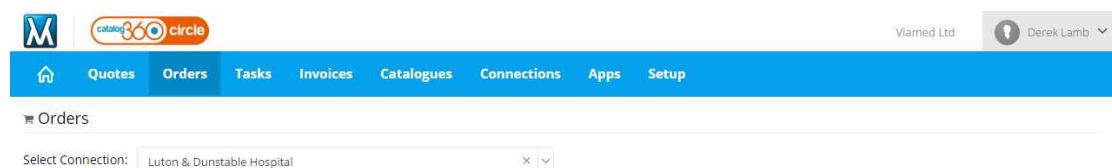
You will be presented with a list of orders, in the "Status" column, find the order which has a red "Open" stamp and click the corresponding "Order #"

This will display the purchase order; ensure all pricing, including shipping is correct. If there are any inaccuracies, contact the person named on the Opera account memo. Process the order but keep on priority 8 until amended on the Catalog360 Circle system. Click on 'Attachments:' and print the page that opens.

Click the print icon in the top right-hand corner and print the page

In Opera, process the order as per the order processing procedure VM3COP20.30 **Make a note on both copies of the ORD to "inform *your name* when invoiced".** This will send you an issue to inform you that the order has been invoiced and is ready to ship so you can proceed to the Shipping and Invoicing stage as per the Catalog360 Circle Shipping and Invoicing procedure on page 9.

When the order is on the system and you know the expected shipment date (if the item is out of stock, check the PO log or ask stock control, if it is an SRS repair, check with Repair Admin staff for shipment date) click on "Confirm"

There is an opportunity to add carriage charges and amend any incorrect unit prices here. You will be asked to provide a delivery date. Click on the calendar symbol and choose TWO WORKING days AFTER the expected shipping date. Click the green "Confirm" button. ***check position

Click confirm, you will be asked if you are sure. If you are certain that all is correct, click, 'Confirm Order'.

When an issue is received to say the order has been picked, proceed to 'Ship' and 'Invoice' the order as per Catalog 360 Shipping and Invoicing procedure on page 9.

In case you do not receive an automatic issue, also make a note in your diary for the day of the expected shipping date to remind you to "Ship" and "Invoice" the order as per Catalog 360 Shipping and Invoicing procedure on page 9.

Catalog 360 Circle Checking Procedure

Collect the order from 'Tray 4 – Sales Orders – Checking' in the office; there should be a minimum of a purchase order (PO) and 2 copies of the ORD plus any communication as applicable.
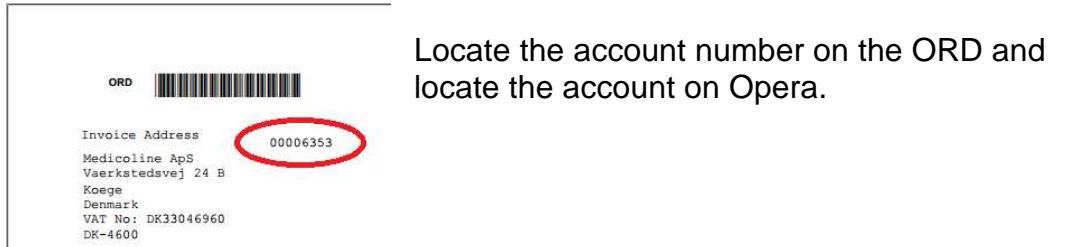
Locate the account number on the ORD and locate the account on Opera.
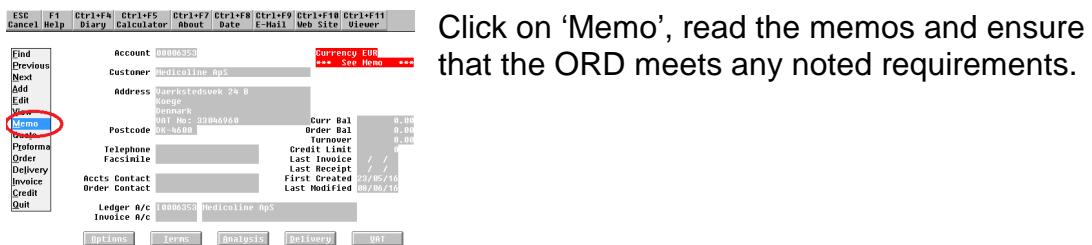
Click on 'Memo', read the memos and ensure that the ORD meets any noted requirements.

Take 1 copy of the ORD and the PO. Compare the invoice address on the ORD to the PO, tick each line on one copy of the ORD to confirm it is correct. Repeat this for the delivery address.

Check the order number on the PO against the 'Cust Ref' on the ORD and tick the ORD if correct.

Check each line against the PO, check part number, description, quantity and price are correct & tick if so.

Check the carriage line for the correct courier as per the items listed, referring to VM3COP03.011 Postage Pricing and Intrastats/Opera stock page as necessary. Ensure the correct delivery option has been determined, i.e. Royal Mail/UPS. If details for reference cannot be found, consult with colleagues or confirm courier/pricing with Goods Out then tick the ORD if correct.
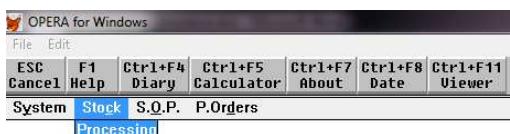
To check an Opera Stock memo, from the menu page in Opera, click 'Stock' and click 'Processing'.
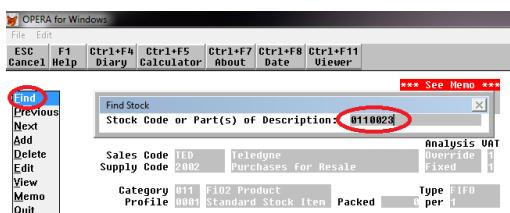
Click 'Find' and type the part number you require further information on, press the 'Enter' key.
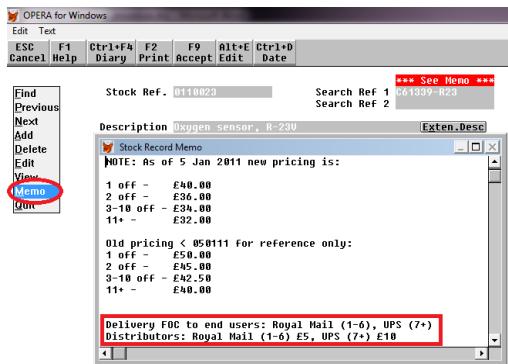
Click 'Memo' and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.

Ensure the priority is correct as per the courier and service used as per VM3COP03.01 Order Processing Priorities, and tick the ORD if correct.

When the priority is correct, check the date due against current cut-off times as found on VM3COP03.01 Order Processing Priorities.

Orders must be scanned in and ORD's taken to Goods Out before cut-off times for the order to be shipped the same day, if the time is later than the cut-off time, the due date would need to be changed to the next working day.
Priority 1 – check with Goods Out for possible ship date
Priority 2 – cut-off time: 11:00am
Priority 3 – cut-off time: 13:00pm
Priority 4 – cut-off time: 15:00pm

Tick the date due on the ORD if correct.

If any details are incorrect, circle them as you work through it. After checking the entire ORD, return all of the paperwork to the person who added the order to enable them to amend any necessary details.

When you are satisfied that the ORD is correct, set the unticked copy of the ORD to one side and staple the remainder of the paperwork (ticked ORD, PO and any communication) in the top-left corner close to the ORD barcode.

Stamp the stapled copy with 'checked' initial and date next to the stamp.
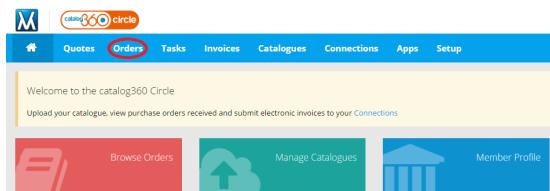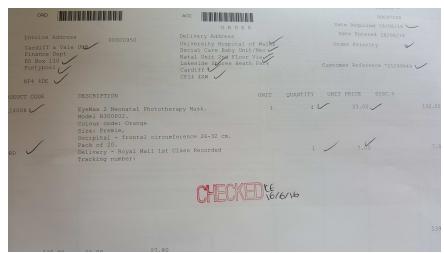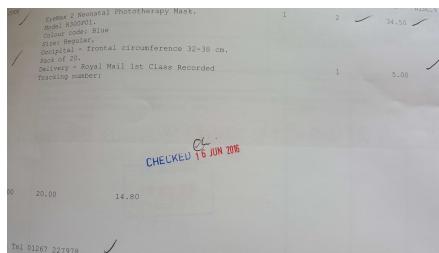
Log into Catalog360 Circle as described on page 1 and click on 'Orders'

Search for the order with the same purchase order number as the 'Cust Ref' on the ORD and ensure the order states 'Confirmed'. If the order states 'New', return the paperwork to the person who added the order and ask for it to be corrected.
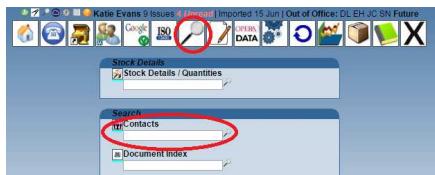

Using Intrastats, navigate to the magnifying glass and click on the 'Contacts' field.

Using your barcode scanner, scan the 'ACC' barcode located at the top-centre of the ORD. This will enter the account number and proceed automatically to the next screen. If you do not have access to a barcode scanner, type the account number (e.g. 00003490) into this box and hit enter.

Click on the company name.

Select the contact name as seen on the bottom left of the ORD. If name not there, refer to VM3COP20.081 on how to add contacts into contact management.

N.B. If the contact does not have an email address linked, check the paperwork thoroughly for an email address.

If an email address can be located, after selecting the contact name, click on 'Edit' under the 'Contact Options'

Enter the email address into the 'Primary Email' field and click 'Submit'. This is to ensure delivery notifications can be sent.

Click on the 'Order Checking' icon

Working your way down the screen, input each section, starting at 'Order number' using your barcode scanner, scan the 'ORD' barcode, this will enter the ORD number located at the top-right of the ORD paperwork. If no barcode scanner is available, type the ORD number e.g. "ORD80574"

The 'Entered into Opera by' box needs to contain the name of the person listed at the bottom-left of the ORD in capital letters.

'Priority on order' needs to match the priority as seen on the ORD

Click the appropriate button for method of PO receipt as per the original PO from the customer.

Any hand-written notes on the ORD must be typed here.

'When order picked inform:' always add the name here of the person who added the order to the system as this will generate an issue for them to 'Ship' the order.

If it is a forward order and there is a note to say the order can be shipped early, tick the 'can be shipped early if ready' box.

This box can also be ticked if cut-off time has been missed as long as the customer has not requested delivery on a specific date.

E.g. If you are checking a priority 3 order which has the next working day's date and the time is 2PM, this box can be ticked as UPS do not arrive until 3PM.

If the due date is the next working day:
Priority 2 can be ticked between 11am and 12pm
Priority 3 can be ticked between 1pm and 3pm
Priority 4 can be ticked between 3pm and 4pm

If the customer changes any part of the order, or should the order need amending for any reason, tick the 'Hold packing AMENDING order' button to prevent the order being invoiced or shipped. Ensure you inform Goods Out of this and reprint the ORD once amended, hand-write a note at the top of both copies of the ORD stating *amended* and place in the checking tray to be re-checking.

When all details are correct, click 'confirm'.

# Catalog 360 Circle Shipping and Invoicing Procedure

When you are informed that the order has been invoiced, go to the GoldMine tab on Intrastats and Click "Contact Management"


Type the name of the contact and click "search"


Click on the O account for the contact
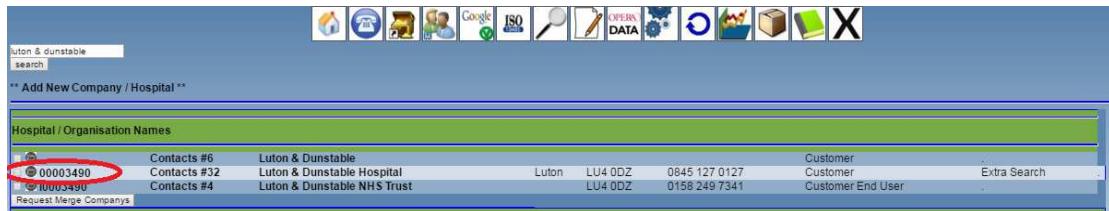
Scroll down to the "History" section and click on the appropriate ORD

This will display a tracking number for the order

Navigate to https://circle.catalog360.com and click "Sign In to the Circle"
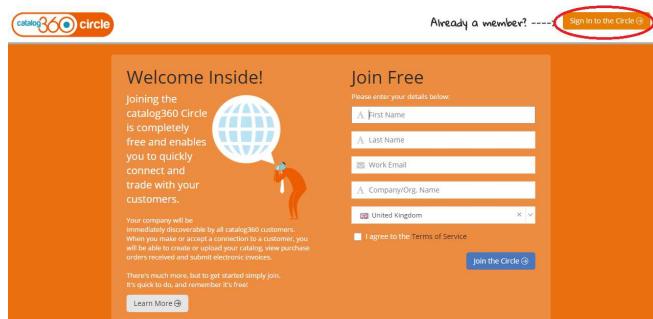
The username is: orders@viamed.co.uk and the current password can be found in GoldMine notes under the contact Stewart Childs at company, Catalog360 Ltd. ***New screenshots***

Click on "Orders"
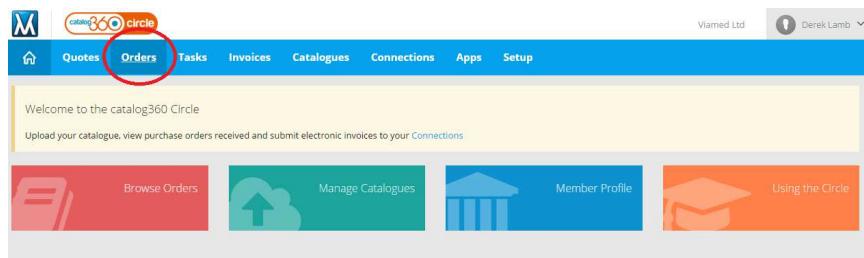
Select the hospital name
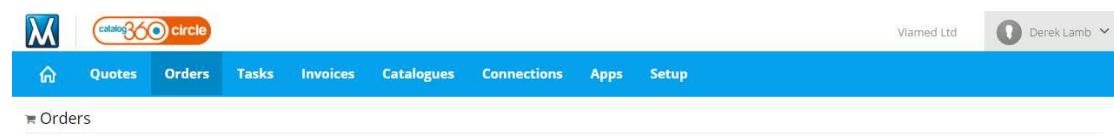
From the list of orders, find the corresponding purchase order and click "Ship" in the "Actions" column

Fill in the "Carrier" and "Tracking Reference" details making sure these are correct and enter the estimated delivery date. UPS and Royal Mail are next working day delivery services, however, they are not guaranteed. Click "Create Shipment"

You will be asked if you are sure, click "Create Shipment"
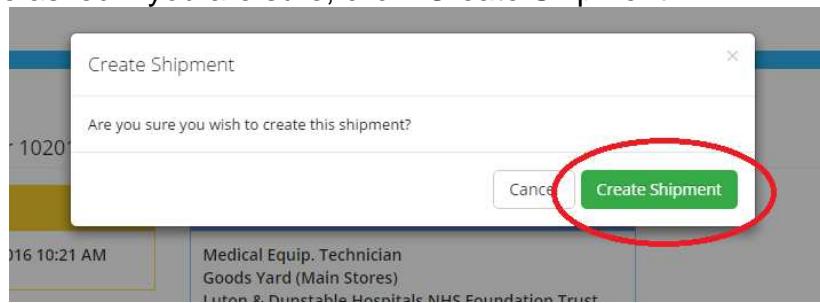
The system will then take you to the open order, scroll to the bottom and click "Invoice Shipment"

You will be presented with the "New Invoice" screen.

From Opera, find the invoice date and invoice number
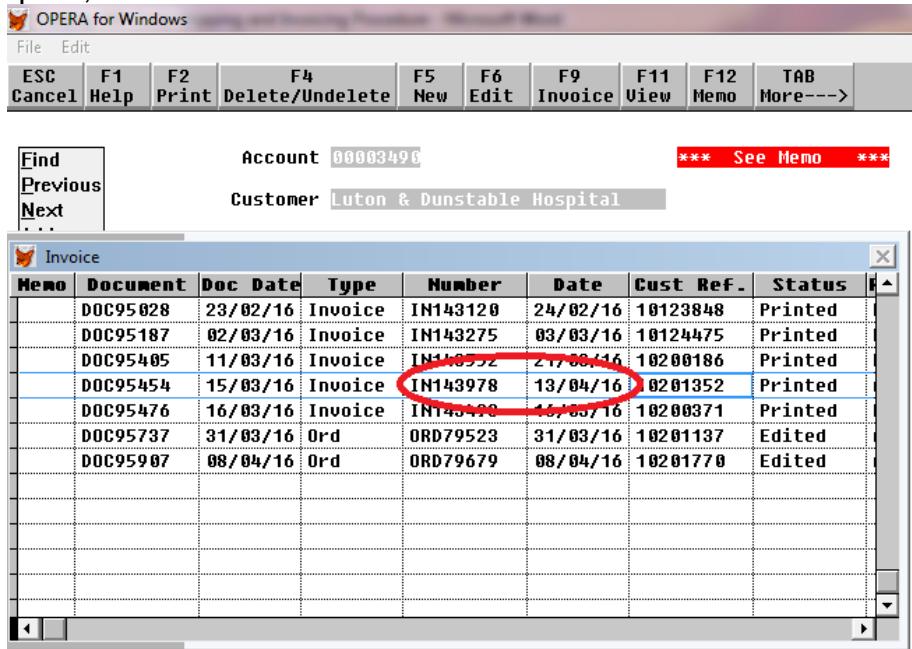
Enter these into the specified fields and ensure the pricing is identical to that stated on the ORD/Opera.
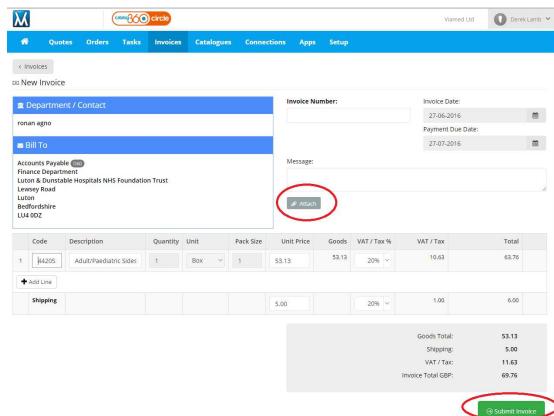
Click the 'Attach' button, navigate to U drive>Operadocs and search for the invoice number. When located, click 'Open'. If the invoice cannot be located, follow the steps on VM3COP20.062 PDFing Of Invoices and try again.

If everything is correct, click "Submit Invoice"

If the pricing is incorrect, read any communication that has been sent and received with the named contact, the pricing should have been amended if it was noticed during processing. If anything is still incorrect, read the memo on Opera for the applicable account and contact the Catalog360 Circle representative for the company/hospital named there and ask that the Catalogue360 Circle system is amended **before** submitting the invoice. When they have made the necessary amendments, you can submit the invoice.