

## VM3COP20.13 - Sending SOR's

### Checklist

- Director authorisation on SOR request paperwork
- SOR Terms and Conditions signed by customer
- SOR number
- Items been scanned to SOR
- Quotation
- Signed MIA Call-Off Agreement/shipping invoice
- Second copy of first page of MIA Call-Off Agreement (delivery address and summary of items)
- Feedback form
- Cover letter on letterhead
- Relevant leaflet and price list
- Relevant Sales Manager's business card
- Blue Viamed folder
- Schedule an issue for follow-up

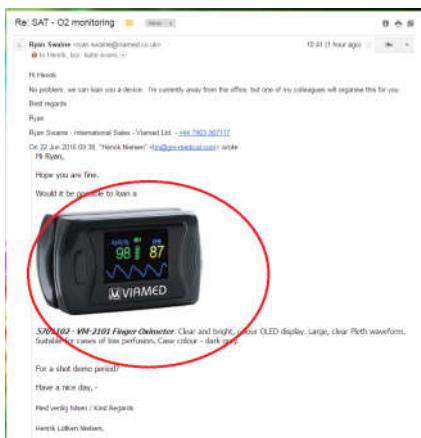
### Paperwork Checklist

To File	To Ship
Copy of first page of MIA Call-Off Agreement (delivery address and summary of items)	Signed MIA Call-Off Agreement, including delivery address and summary of items)
Signed SOR request paperwork	Cover letter
Quotation	Customer SOR feedback form
Signed Terms & Conditions	Price list
	Leaflet
	Quotation
	Sales Manager's business card
	Blue Viamed folder

## VM3COP20.13 Sending Sale or Return Orders

### Beginning the Process

1. Print the Sale or Return request if requested by email, if the request was verbal/telephone, add a telephone order and print as per VM3COP27.29. Gain authorization from a Director and their signature/date on the request paperwork.



2. From the Lookup/Magnifying Glass tab on Intrastats, Click on the 'Contacts' search field and type the company name or account number



3. Click the correct account

Hospital / Organisation Names			
80009300	Contacts #6	Blueprint Medical GmbH & Co. KG	0049 388 235480029
80008327	Contacts #5	GM Medical	4545 570 881
80007327	Contacts #5	GM Medical A/S	3460 +454 557 0881
80000240	Contacts #4	GM Medical GmbH	3460 0945 455 7981
80006249	Contacts #3	Lemon Medical GmbH	077782 4910 981 327981510
80005721	Contacts #1	Melina Medical GmbH & Co KG	40699 4910 981 327981510

4. Click on the required name

5. Click on the Sale or Return icon

6. Click, "Add New Sale/Return"

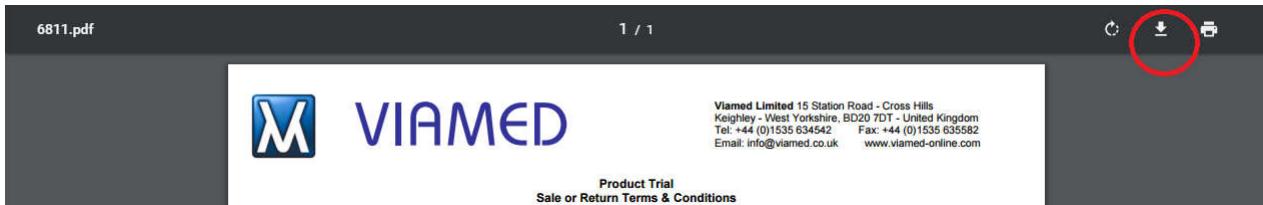
This will direct you to the main sale/return page and create a new record for the contact

7. Click 'Product Trial – Sale or Return Terms and Conditions'

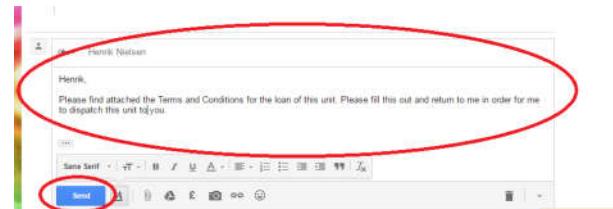
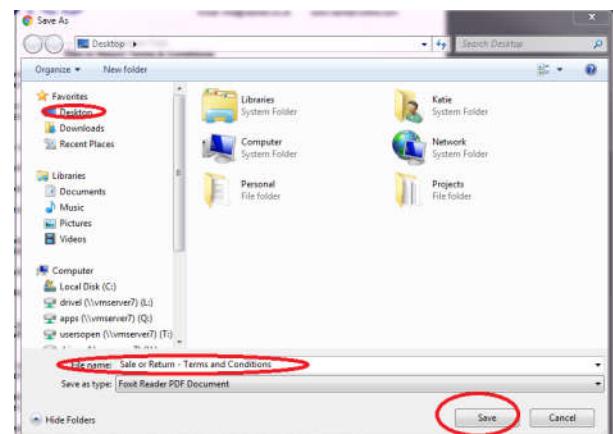
8. Click the PDF icon to open the file

Document ID	Type	Description	More	Usage	Added	Expires
6811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	Details	Unrestricted	19 Feb 2010	

9. When the file opens, click on the download icon located at the top-right of the screen



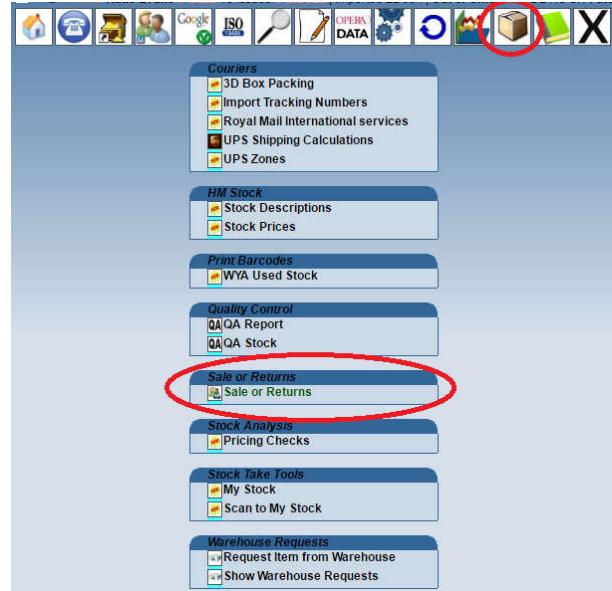
10. When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'



11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email to the left.

## Requesting Stock Movement

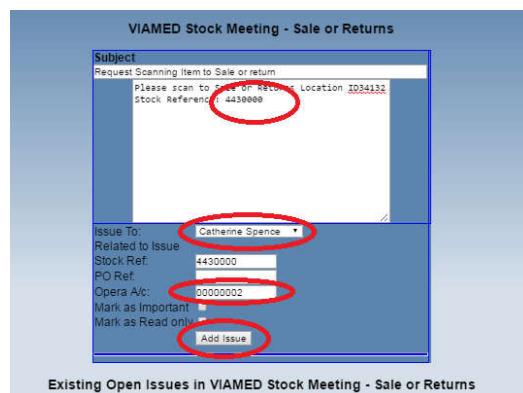
12. Return to Instrats and click on the stock box icon. From this page, click on 'Sale or Returns'



13. Scroll to the bottom of the page and click "Request new stock item to be scanned to Sale or Return".



14. Fill in the issue detailing the part number(s) and quantity required. Send this issue this to the person in Goods Out, fill in the Opera A/c number and click "Add Issue"



15. Print out the issue and place in the picking tray in Goods Out.

Note: if the item is urgent, also inform Goods Out verbally.

## When Terms and Conditions are Signed / Generating Quote

When you have received the completed Terms and Conditions from the customer and once you have confirmation from Goods Out that the items have been scanned, you need to add them to the SOR record and create an Opera quote.

Confirmation from Goods Out will come in the form of an issue, in reply to the issue sent to Goods Out.

Take note of the ID number(s) provided for the product(s) scanned.

Request Scanning Keys To Sale Or Return: Issue Notes to: Katie Evans -HD Catherine Spence

Issue To User: Catherine Spence

Issue Reference: 0012101

Issue Notes: 22 June 2016 Catherine Spence

Issue Notes: 22 June 2016 Catherine Spence

New Notes: Subject: Request Scanning Keys To Sale Or Return  
Message: 144822 Stock Meeting Sale or Returns  
Create  
Line to Issue #  
Attach  
Related Issue  
Add To File Number: 73457  
Complete ISSUE  
Add To File Number: 73457  
Issue Permit: CLOSER  
Issue Notes: Urgent  
Issue Notes: Urgent: New action: Pending the issue in a new year and not meeting to Katie Evans  
Next Action: Catherine Spence • Changing this field means Catherine Spence may not see updates to issue  
Priority: 5  
Confirm Item is available for issue - item will be added to the system

16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.

Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

Also, in the comments section beneath the name and telephone number of the customer, state "Goods already supplied on SOR\*\*\*"

Next, the serial numbers need to be typed in the memo for each item sent.

17. Click on the product line and press F12 or click the "F12 Memo" button. This will open the memo.

Add a New Sale / Return Completed Sale / Returns analyse\_sale\_return

Product List - Add an Return Service and Conditions  
Vanned Product Trial Feedback Form

Sale Returns: Net Sale to Preposition

SOR: SOR729

Comments: Henrik Nielson - +45 4557 0881  
Goods already supplied on SOR729

OPERA for Windows

File Edit

ESC F1 F9 Cancel Help Accept

Find Previous Next Add Edit View Memo Quote Proforma Order Delivery Invoice Credit Quit

Account: 00007327  
GM Medical A/S  
Blokken 11  
3460 Birkerød  
Denmark

Delivery: GM Medical A/S  
Blokken 11  
DK-3460 Birkerød  
Denmark

Cust Ref: SOR729  
Memo: N  
Document: \*\* AUTO \*\* 22/06/16  
Quote: \*\* AUTO \*\* / /

Priority: 3  
W/House: MAIN Main Warehouse  
Model: N

Raised By: KATIE

Comments: Henrik Nielson - +45 4557 0881  
Goods already supplied on SOR729

Analysis Currency Discount

Reference: 1410000  
W/H Description: MAIN Foetal Heart Simulator, model V1000.  
Quantity: 1

Analysis: SPO VAT code: Sell.: 595.00 Line Disc.: 0.00 Ext.: 595.00  
Cost.: 295.00 Margin.: 50.42% Prof.: 300.00  
Due: 08/11/16 Priority: P/O

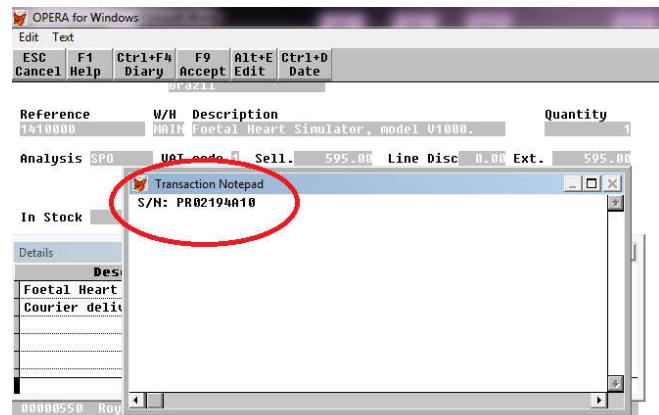
In Stock: 0 P.Orders: 0

Details

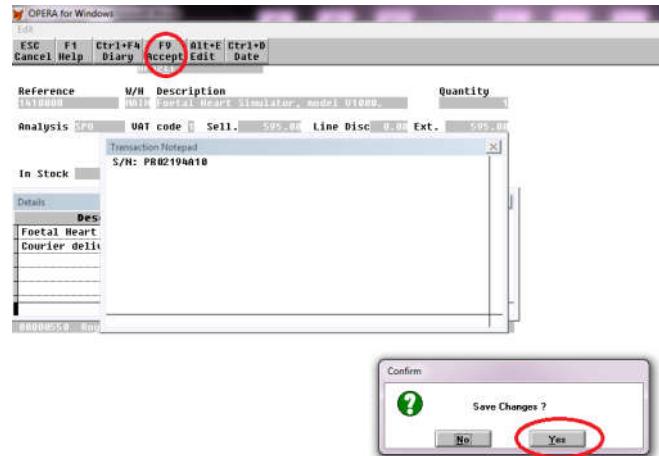
Description	Quantity	Price	Disc.	VAT	Value
Foetal Heart Simulator, model V1000	1	595.00	1	595.00	
Courier delivery - Standard	1	10.00	1	10.00	

00008550 Royal Blackburn Hospital Quote total ex VAT 605.00

18. Type the serial number in the format as seen to the left, e.g. "S/N: ???". There may be additional notes here, if so, add the serial number beneath them.

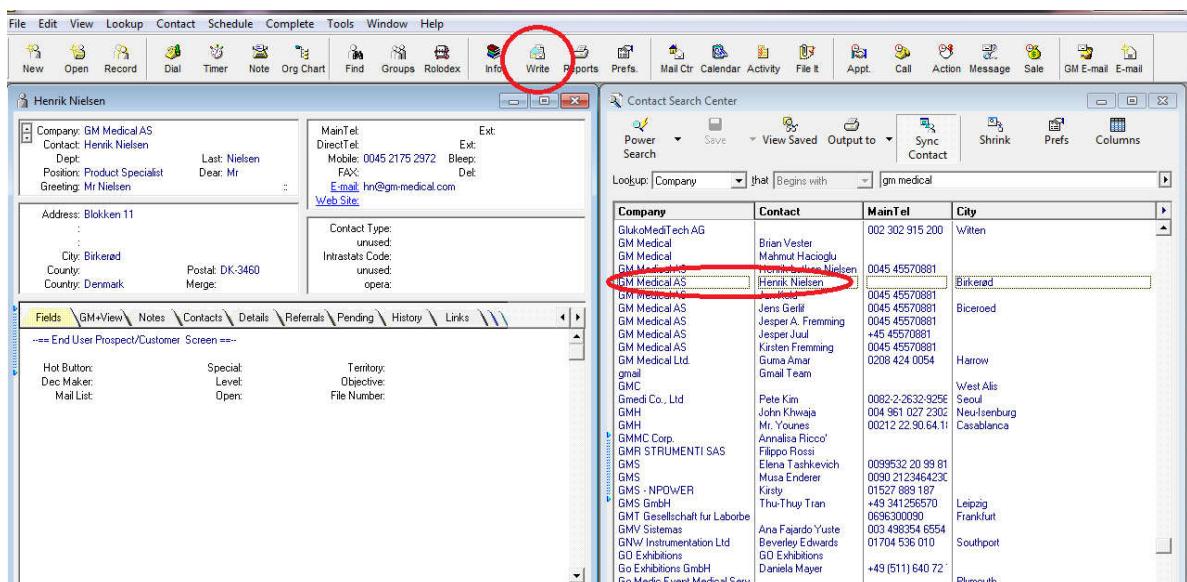


19. When completed, press F9 or click the "F9 Accept" button. You will be asked if you would like to save the changes, click "Yes".

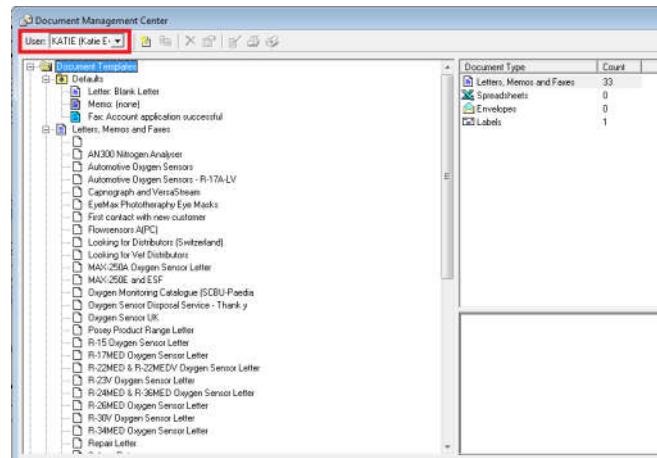


20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

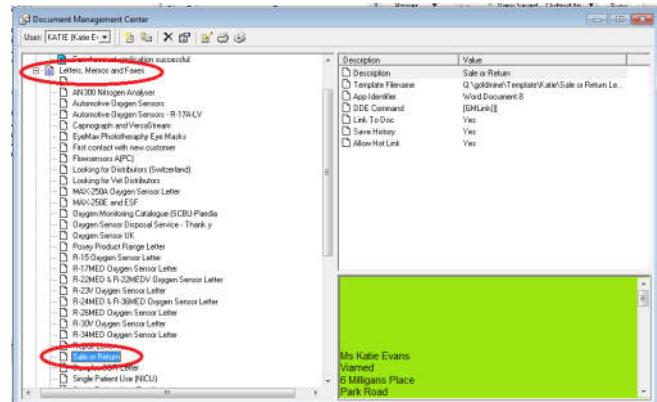
21. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button



22. Ensure the user is set to your name



23. Click on 'Letters, Memos and Faxes' to view the list beneath and double-click the letter named 'Sale or Return'. If this letter cannot be found, speak with the marketing department and request that they add it for you.



24. When the letter opens, amend all the details as indicated in the example to the right, to include the product description, part numbers, SOR number and serial number.

When complete, read through the letter and ensure the grammar is correct, i.e. if there is more than one item, the words, "This product is" may need to be changed to, "These products are" and remove the word, "Trust" if not for the NHS.

25. When complete, print one copy of this letter on letterhead and save to drive>current year>current month, with the following format:

Sale or Return - \*customer name\* - SOR\*\*\* - \*date backwards\* e.g. "Sale or Return – GM Medical – SOR729 – 160622"

Mr Henrik Nielsen  
Product Specialist  
GM Medical AS  
Blokken 11  
Birkerød, DK-3460  
Denmark

June 2016

Dear Mr Nielsen,

Re: **(Product Description)** Sale or Return, ref **SOR???**

Further to our recent discussions **(Customer Name)**, please find enclosed a **(Product Description)**, for the purpose of a trial.

- Part Number: ??????? - **(Product Description)** S/N ?

This product is brand new and unused, so if after evaluation the end user wishes to purchase it, it can just raise an official order and keep the instrument, otherwise we will require it returning in its original packaging.

I have allocated a standard trial period of 4 weeks, and have included a Delivery Note to cover the indemnity for that period. I shall contact you in due course for any feedback and decision as to whether the Trust wishes to purchase it.

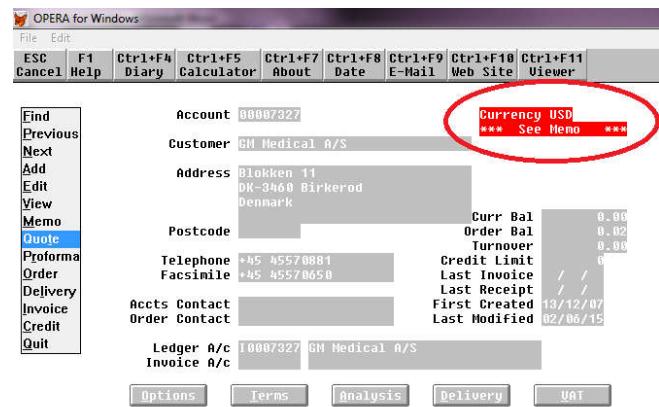
Should you have any queries, or wish to discuss the instrument in further detail, please do not hesitate to contact me.

Yours sincerely

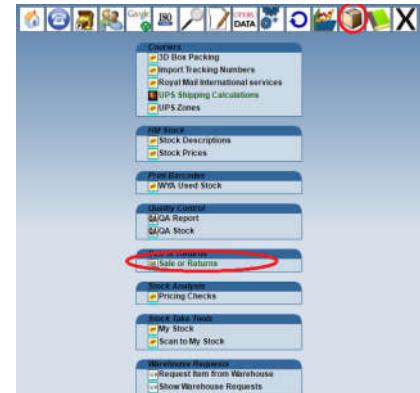
U

Katie Evans  
Office Administrator

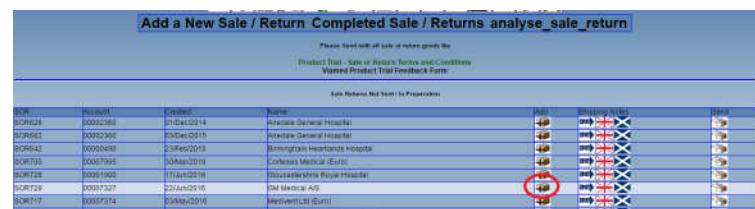
26. Print a colour price list from L:\ Drive in the correct currency as found on the customers Opera account.



27. Return to the main SOR page located in Intrastats>Stock icon>"Sale or Returns"



28. In the top list 'Sale Returns Not Sent / In Preparation' click the icon in the 'Add' column for the correct customer/SOR number.

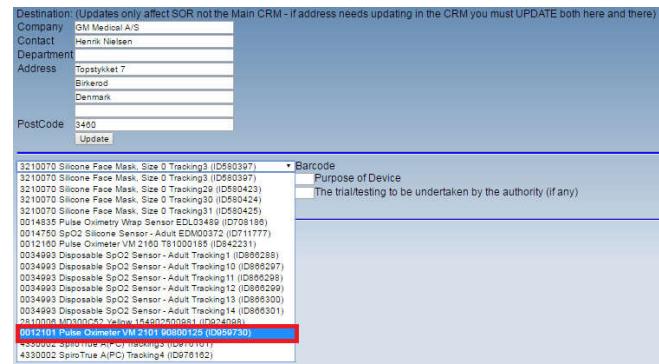


29. Ensure the name and address details at the top of the screen are correct.

30. From the "Barcode" drop-down on the next page, select the item you want to send.

Ensure you choose the item with the correct ID number as per the Goods Out confirmation issue.

31. In the field entitled "Purpose of Device", enter a brief explanation of the use of the item (if unsure, the Opera description will suffice), for example "SpO2 sensor for Viamed pulse oximeter" or "Measuring concentration of oxygen".



32. In the field entitled "The trial/testing to be undertaken by the authority (if any)" type a brief summary, for example "Sale or Return trial to determine suitability prior to purchase"

Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company: GM Medical A/S  
Contact: Henrik Nielsen  
Department:  
Address: Topsykklet 7  
Birkeroed  
Denmark  
PostCode: 3460  
Update

0012101 Pulse Oximeter VM 2101 90800126 (ID959730) • Barcode  
Finger Pulse Oximeter Purpose of Device  
Sale or Return trial to determine suitability prior to purchase  
Loan • Submit (The trial/testing to be undertaken by the authority (if any))

Current items on sale Return id #729  
Print Print Picking List  
[Stock Ref|Serial number|Barcode|Description|Type]

In the drop-down box next to the "Submit" button, select "Loan".

33. Repeat for all items required.

34. If the Sale or Return is for an export customer then a value needs to be entered in the, "Value for Customs if applicable". Consult with the International Sales Manager or the Commercial Director for the customs value to use.

35. Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an MIA Call-Off Agreement depending upon the location of the customer (England, Wales and Northern Ireland use the same form, Scotland has its own) or export for non-UK customers.

36. Save the PDF to U drive>Current year>Current month in the following format:

Export: "SOR Shipping Invoice - \*Customer Name\* - SOR\*\*\* - date backwards"

UK: "SOR Delivery Note - \*Customer Name\* - SOR\*\*\* - date backwards"

Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company: Viamed A/S  
Contact: Michael Baumann  
Department:  
Address:  
PostCode:  
Value for Customs if applicable: 33  
Update

00120701 Silicone Face Mask, Size 3 Tracking3 (ID660397) • Barcode  
Silicone Face Mask, Size 3 Tracking3 Purpose of Device  
Adult • Submit (The trial/testing to be undertaken by the authority (if any))

Current items on sale Return id #742  
Print Print Picking List  
[Stock Ref|Serial number|Barcode|Description|Type]  
00034903 (Tracking22 9093309) (Disposable SpO2 Sensor - Adult g) [Remove] Print Delivery Note (Today date) Print Delivery Note (Created date)

Add a New Sale / Return / Completed Sale / Returns analyse\_sale\_return

Please insert with all code or return provide the  
Product Year - Sale or Return Terms and Conditions  
Viamed Product Trial Feedback Form

Date Analysis Not Sent / In Preparation

Ref	Part Number	Barcode	Description	QTY	Unit Price	Sub Total	Net Total
SOR1701	0012101	210190800126	Finger Pulse Oximeter VM 2101	1	\$100.00	\$100.00	\$100.00
SOR1702	00034903	9093309	Disposable SpO2 Sensor - Adult g	1	\$100.00	\$100.00	\$100.00
SOR1703	00009400	2104002011	Breathing Mask/Humidifier	1	\$100.00	\$100.00	\$100.00
SOR1704	00009401	2104002011	Breathing Mask/Humidifier Hospital	1	\$100.00	\$100.00	\$100.00
SOR1705	00009405	2104002011	Collected Medical (Easy)	1	\$100.00	\$100.00	\$100.00
SOR1706	00009406	2104002011	Discontinued/Royal Hospital	1	\$100.00	\$100.00	\$100.00
SOR1707	00009407	2104002011	Medi-Mask A/R	1	\$100.00	\$100.00	\$100.00
SOR1708	00009408	2104002011	Medi-Mask B/Breath	1	\$100.00	\$100.00	\$100.00

Viamed Shipping Invoice

Delivery Address: GM Medical A/S Henrik Nielsen Topsykklet 7 Birkeroed Denmark 3460 Date: 23 Jun 2016 Invoice #: SOR00729

Shipper Address: Viamed 15 Station Road Cross Hills Keighley West Yorkshire BD20 7DT +44 (0) 1535 634542; +44 (0) 1535 635582; info@viamed.co.uk

Demo products not for resale Value for Customs : \$100.00

Part Number	Viamed Part Number	Description	Quantity	Value
0012101	0012101	Finger Pulse Oximeter VM 2101	1	\$100.00

Tariff Code: 90181990-00

Back: Alt+Left Arrow  
Forward: Alt+Right Arrow  
Reload: Ctrl+R  
Save as... Ctrl+S  
Print... Ctrl+P  
Translate to English  
Print Preview

37. Print the delivery note/shipping invoice and print a second copy of the first page.

If the SOR is for a UK customer, strike through the "Form of Indemnity B" section and ask a director or sales manager to sign "Form of Indemnity A" to ensure that ownership of the unit does not pass to the customer.

38. On the main Sale Or Return screen, click the link 'Viamed Product Trial Feedback Form'

39. Click on the PDF icon

40. This will open the feedback form; print one copy of this as it will be sent with the goods to allow the customer to offer feedback.

41. Gather all paperwork and secure with a paperclip, place in the checking tray for an office team member to check.

## Notes

Product	Accessories	Loan/Giving
VM-2160	SpO2 sensor (0014750 as standard)	Loan
VM-2500-S/M/MG	SpO2 sensor (0014750 as standard)	Loan
	Sampling lines/airway adapters or Versastream	Giving
	If sending a wrap sensor, an additional four x Posey wraps (part number 0021012) or four x 4000 series sensor wraps (part number 0014889) are required	Giving
AX/MX300i	R-17MED	Loan

## Checking an SOR

Ensure the items listed on the MIA Call-Off Agreement/shipping invoice match the items requested by the customer

Ensure the paperwork to ship with the items have been placed in a blue Viamed folder.

The folder should contain:

MIA Call-Off Agreement/shipping invoice signed by a director
Cover letter on letterhead paper
Customer SOR feedback form
Price list for products being sent
Leaflets for products being sent
Quotation for products being sent
Relevant Sales Manager's business card

The paperwork to file should contain:

Copy of MIA Call-Off Agreement/shipping invoice
SOR request paperwork with director signature
A copy of the quotation for products being sent
Terms & Conditions signed by the customer

Stamp the filing copy of the MIA Call-Off Agreement/shipping invoice and initial/date next to it. Return to the person who added the SOR.

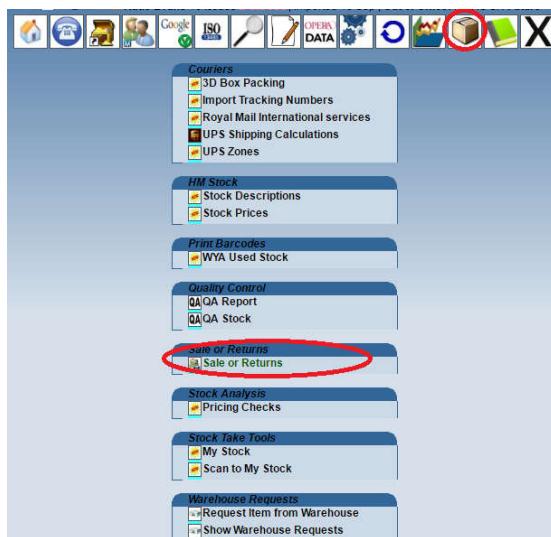
## After Checking

When checked by an office team member, staple the request paperwork with director's signature, a copy of the quote, the signed Terms and Conditions to a copy of the first page of the SOR MIA Call-Off Agreement and place them in the "Active SOR's" file located in the office.

Put one copy of the **Opera quotation, letter, signed MIA Call-Off Agreement (or shipping invoice for export customers), feedback form, leaflet, and price list** into a **blue Viamed folder** with the relevant Sales Manager's **business card** and take to Goods Out.

## Following up the Evaluation

1. The sender needs to schedule themselves a follow up issue 4 weeks ahead, to discuss the product with the customer, obtain feedback and determine the outcome of the evaluation. The standard loan time for SOR is 4 weeks.
2. If following up by email, please direct the customer to the online feedback form: <http://www.viamed.co.uk/trial-feedback>.
3. When the recipient has been followed up, return to the main Sale or Return page by clicking on the 'Stock' icon and clicking, 'Sale or Returns'.



4. Click, 'analyse\_sale\_return' .



5. Locate the SOR number for the customer you are following up, this can be identified by the SOR number on the left. Click the button on the corresponding line named, 'I've chased this up', this will then display the name and date of the person who dealt with it.

<input type="button" value="Submit"/> <input type="button" value="Print"/>					
SOR753	Crystal Durrow	00001430 Dorset County Hospital	16/09/16	Show Delivery Note	I've chased this up
SOR752	Sam Jones	00002020 Royal Surrey County Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR751	Kathy Lowes	00005430 New Cross Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR750	Michelle McQuillin	00004470 Salisbury District Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR749	AO: Janine Campbell	00004735 Southampton General Hospital	15/09/16	Show Delivery Note	I've chased this up
SOR748	Do Rhyan Curfin	10012969 Emergency Medical and Retrieval Transfer Service	13/09/16	Show Delivery Note	Steve Hardaker
SOR747	Mark Elliott	00005130 Torbay Hospital	05/09/16	Show Delivery Note	Steve Hardaker
SOR746	Golden Cruz	00007885 Jamjoom Medical Industries	05/09/16	Show Delivery Note	Ryan Swaine
SOR745	Shani Suliman	00000550 Royal Blackburn Hospital	24/08/16	Show Delivery Note	I've chased this up
SOR743	Soya Ward	00002824 Chelsea Westminster Hospital	09/08/16	Show Delivery Note	Katie Evans
SOR742	Michael Baumann	00007515 Merivaaara AB	09/08/16	Show Delivery Note	Katie Evans
SOR741	Helen Clark	00001900 Gloucestershire Royal Hospital	08/08/16	Show Delivery Note	Emily Hanson
SOR739	Silvia Nedea	00006304 Artisana Medical	27/07/16	Show Delivery Note	Emily Hanson
SOR737	Tommy Muirhead	00003560 Manchester Royal Infirmary	13/07/16	Show Delivery Note	Steve Hardaker
					01 Sep 2016 Katie Evans
					02 Sep 2016 Katie Evans
					01 Sep 2016 Emily Hanson
					01 Sep 2016 Emily Hanson

6. When feedback is received, add an issue as per 'Issues Overview' Doc ID: 12395 under the 'Feedback' meeting name, and select either 'Product Feedback Negative' or 'Product Feedback Positive' as appropriate. If the feedback relates to our service, add an issue as per 'Issues Overview' Doc ID: 12395 under the 'Feedback' meeting name, and select either 'Customer Feedback Negative' or 'Customer Feedback Positive' as appropriate.

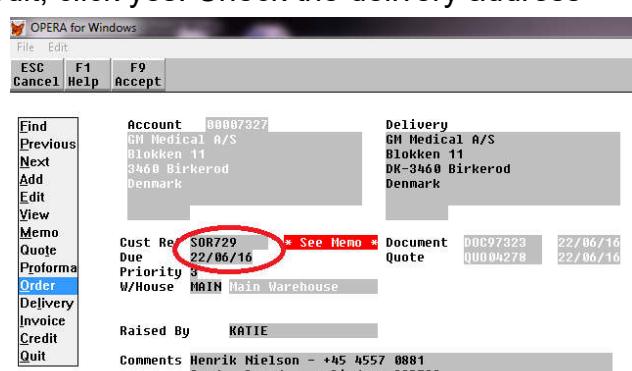
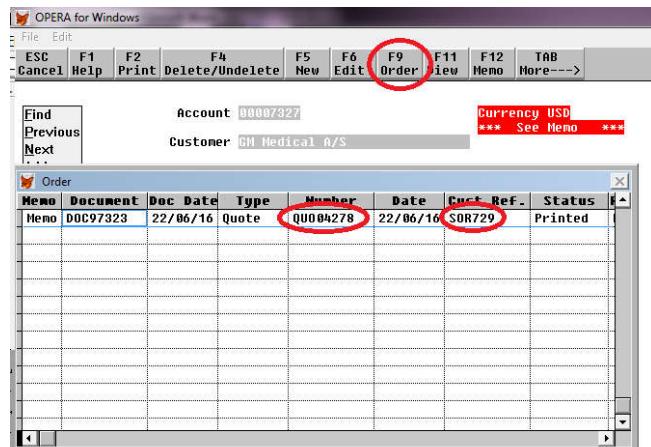
This feedback can also be viewed for reference from the 'Add Issue' page by clicking on the number in the 'Total Inc Complete' column.

	Production	Production Schedule	106
	CE Technical Files	CE Technical Files	29
	Feedback	Company Innovation	2
	Feedback	Customer Feedback Negative	6
	Feedback	Customer Feedback Positive	107
	Feedback	Product Feedback Negative	18
	Feedback	Product Feedback Positive	403
	Feedback	Product Innovation	134
	Feedback	Systems Innovation	3
	Feedback	VIAMED Feedback	182
	Product Catagories	Oxygen Hoods	9
	Product Catagories	Product Catagories	1

## SOR Purchase

If the customer chooses to purchase the SOR items, they will provide you with an official purchase order; if they have only provided an email agreement to purchase, please request an order number and an official purchase order.

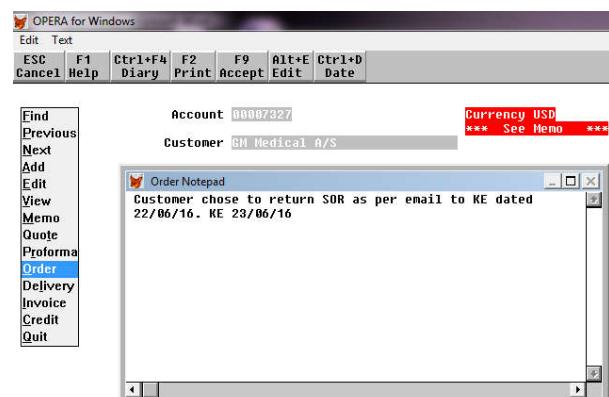
1. Once received, retrieve the SOR paperwork from the SOR file.
2. Locate the account on Opera and press 'O' to open the orders menu, or click on 'Order'.
3. Click on the correct quote and press F9 to convert the quote to an order.
4. When asked if you would like to edit, click yes. Check the delivery address against the PO; it is not always known at the point of quotation but this must match the PO.
5. Amend the 'Cust Ref' box to the purchase order number and change the 'Due' date to the next available shipping day.
6. A note should have been added at the quote stage, in the 'Comments' section "Goods already supplied on SOR\*\*\*". Ensure it is still there, if not, add this note.
7. Press F9 twice to complete the order.
8. Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR\*\*\*". Place all of the paperwork in the checking tray. Once checked by a member of the office admin team, take the unticked copy of the ORD to Goods Out as per VM3COP20.05 order processing procedure. Goods Out will then invoice the order. The checked paperwork should be filed as per VM3COP20.28 Filing and Archiving.



**Note:** If the customer chooses to add any additional items to the order, hand-write a note on both copies of the ORD to state which items need shipping and which only need to be invoiced. E.g. "1 x 0012160 and 1 x 0014750 already supplied on SOR\*\*\*, please ship other items".

## SOR Return

1. If the customer chooses to return the SOR items, issue the customer with a returns reference number (SRS) as per VM3COP20.03 Repair Intrastats Procedure. When the item is received by Goods In, you will receive an issue.
2. When this issue is received, print it. Locate the account and correct quote on Opera. Press F12 and write a memo to say that the customer did not want to purchase the goods and has returned them on SRS\*\*\*\*. Initial and date the memo and press F9 to confirm



3. On the next screen, you will see the quote again, press F4 to delete, and click yes when asked to confirm.
4. Retrieve the SOR paperwork from the Active SOR's file located in the office. Write on the front sheet that it has been returned and reference the issue number Goods In sent you to advise it has been returned.
5. Staple all of the SOR paperwork and the printed issue, detailing the confirmation of return, together and place in the Miscellaneous file located in the office as per VM3COP20.28 - Filing and Archiving.

