

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

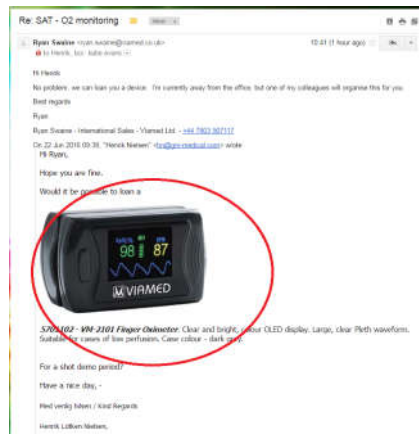
Paperwork Checklist

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

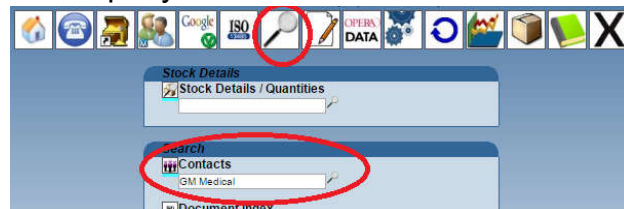
VM3COP20.13 Sending Sale or Return Orders

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	Blumpoint Medical GmbH & Co. KG	0940 388 235480029	Supplier	Extra Search	
80007327	Contacts #5	GM Medical	4545 570 881	Customer		
80007327	Contacts #6	GM Medical A.S.	4545 557 0881	Customer End User		
80007327	Contacts #2	GM Medical A.S.	3450 0045 455 70881	Customer End User		
80006249	Contacts #1	Lemmon Medical GmbH	4900 357 327801510	Customer End User		
80006249	Contacts #1	Lemmon Medical GmbH	4900 357 327801510	Customer End User		
80007521	Contacts #1	Mefina Medical GmbH & Co KG	40599	Customer End User		

4. Click on the required name

CID 6382 GM Medical A/S
 Topstykke 7
 Birkerød
 Denmark
 3460
 Denmark
 Tel: 0045 45570881
 Opera: 00007327
 Type: Customer End User
 Invoice Address/Account: 0007327

Company Options

Henrik Nielsen
 Søren Bjerre

Department Position Direct Phone Email

Henrik Nielsen 4545 570 881 7
 Søren Bjerre 4545 570 881 7

History - Switch to Condensed

Ruth Hardaker ORD75997 08/09/2015 Søren Bjerre 08/09/2015 Ruth Hardaker
 Ruth Hardaker ORD70351 25/06/2014 Henrik Nielsen 25/06/2014 Ruth Hardaker

5. Click on the Sale or Return icon

CID 6382 GM Medical A/S Henrik Nielsen ID 12875
 Topstykke 7
 Birkerød
 Denmark
 3460
 Denmark
 Tel: 0045 45570881
 Opera: 00007327
 Type: Customer End User
 Invoice Address/Account: 0007327

Company Options

Contact Options

Ruth Hardaker ORD70351 25/06/2014 History 25/06/2014 25/06/2014 Ruth Hardaker

6. Click, "Add New Sale/Return"

CID 6382 GM Medical A/S Henrik Nielsen ID 12875
 Topstykke 7
 Birkerød
 Denmark
 3460
 Denmark
 Tel: 0045 45570881
 Opera: 00007327
 Type: Customer End User
 Invoice Address/Account: 0007327

Company Options

Contact Options

Sale or Returns
 Add New 'Sale / Return'

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

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the
 Product Trial - Sale or Return Terms and Conditions
 Visited Product Trial Feedback Form

Sale Returns Not Sent (in Preparation)

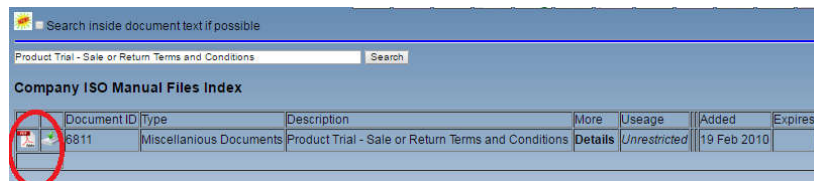
SOR	Account	Created	Name	Cost	Price	Spent
SOR628	00002380	01/Dec/2014	Arcadia General Hospital	4.00	0.00	1.00
SOR682	00002380	03/Dec/2015	Arcadia General Hospital	4.00	0.00	1.00
SOR642	00000480	23/Feb/2015	Birmingham Heartlands Hospital	4.00	0.00	1.00
SOR705	00007995	30/Mar/2016	Cotnam Medical (Euro)	4.00	0.00	1.00
SOR728	00001900	17/Jun/2016	Sturgesborough Bariatric Hospital	4.00	0.00	1.00
SOR690	00007327	22/Jun/2016	GM Medical A/S	4.00	0.00	1.00
SOR717	00007314	22/Jun/2016	GM Medical A/S	4.00	0.00	1.00
SOR681	00005172	11/May/2015	Pinellas Royal University Hospital	4.00	0.00	1.00
SOR723	00012966	27/May/2016	Prins Hospital Charnoford	4.00	0.00	1.00
SOR627	00000590	24/May/2014	Royal Bolton Hospital	4.00	0.00	1.00
SOR671	00003220	18/Aug/2015	Royal Free Hospital	4.00	0.00	1.00
SOR692	00000009	26/Feb/2016	Staff Purchasing account	4.00	0.00	1.00
SOR693	00000009	26/Feb/2016	Staff Purchasing account - KE	4.00	0.00	1.00
SOR724	00004890	16/Jun/2016	Stepping Hill Hospital	4.00	0.00	1.00
SOR674	00002130	06/Sep/2015	University Hosp of Hartlepool	4.00	0.00	1.00
SOR718	00000002	09/May/2016	Vismed Ltd	4.00	0.00	1.00
SOR720	00000002	23/May/2016	Vismed Ltd	4.00	0.00	1.00
SOR725	00003450	16/Jun/2016	Whipps Cross University Hospital	4.00	0.00	1.00
SOR726	00003450	16/Jun/2016	Whipps Cross University Hospital	4.00	0.00	1.00
SOR727	00003450	16/Jun/2016	Whipps Cross University Hospital	4.00	0.00	1.00

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

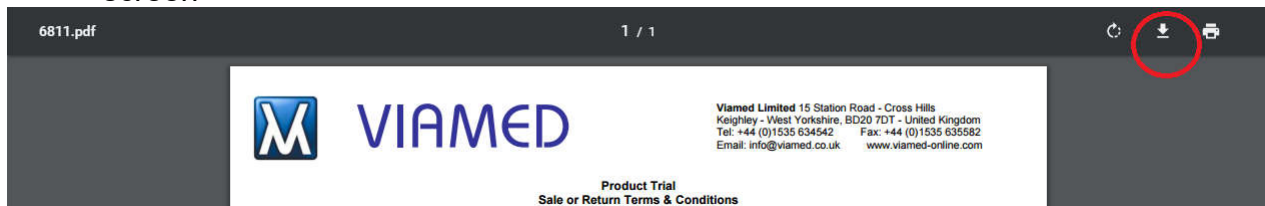
Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the
 Product Trial - Sale or Return Terms and Conditions
 Visited Product Trial Feedback Form

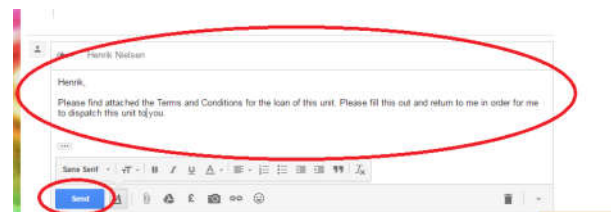
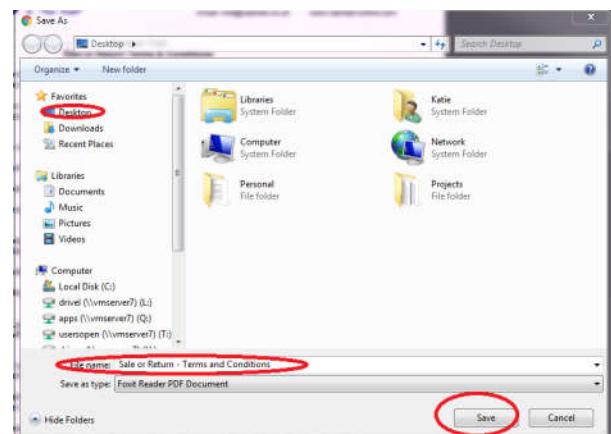
8. Click the PDF icon to open the file



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



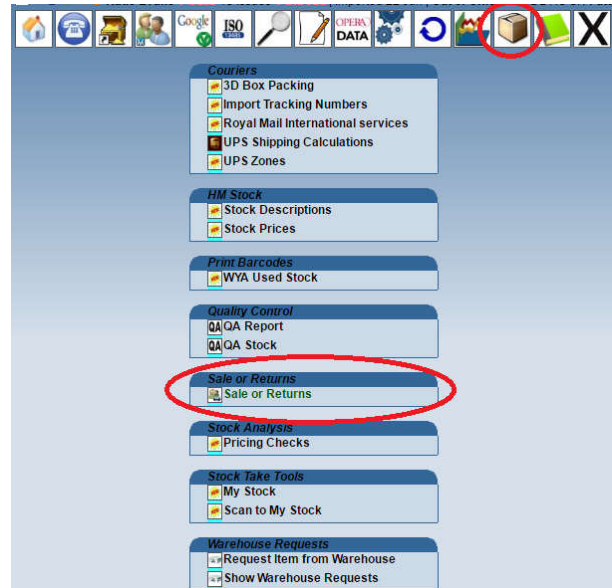
10. When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'



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 Intrastats 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".

Barcode	Serial number	Stock Ref	Description
88186	EDJ31483	2014835	Pulse Gateway Wap Sensor
88208	Tracking	2014893	Disposable SpO2 Sensor - Adult
88297	Tracking10	2014893	Disposable SpO2 Sensor - Adult
88298	Tracking11	2014893	Disposable SpO2 Sensor - Adult
88298	Tracking12	2014893	Disposable SpO2 Sensor - Adult
88300	Tracking13	2014893	Disposable SpO2 Sensor - Adult
88301	Tracking14	2014893	Disposable SpO2 Sensor - Adult
88307	Tracking	2110275	Silicone Face Mask, Size 0
88425	Tracking29	2210079	Silicone Face Mask, Size 0
88424	Tracking30	2210079	Silicone Face Mask, Size 0
88425	Tracking31	2210079	Silicone Face Mask, Size 0
88436	80736145	4410000	Capnograph Vlt 2000M
88552	Tracking754433_8	4420812	

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"

VIAMED Stock Meeting - Sale or Returns

Subject
Request Scanning Item to Sale or return
Please scan to Sale or Return Location ID34132
Stock Reference: 4430000

Issue To: Catherine Spence
Related to Issue: 4430000
Stock Ref: 4430000
PO Ref: 20000002
Opera A/c: 20000002
Mark as Important
Mark as Read only

Add Issue

Existing Open Issues in VIAMED Stock Meeting - Sale or Returns

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.

- 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.

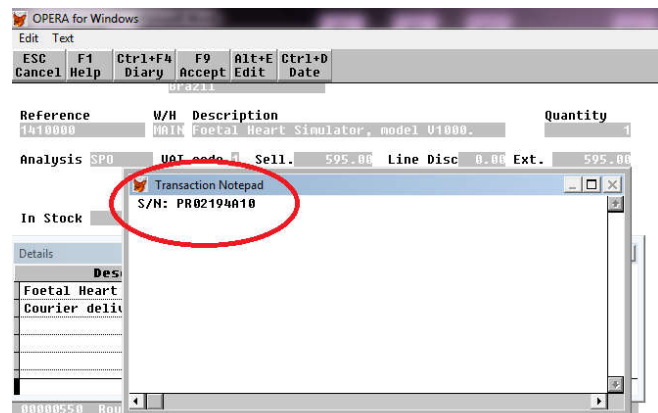
Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

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

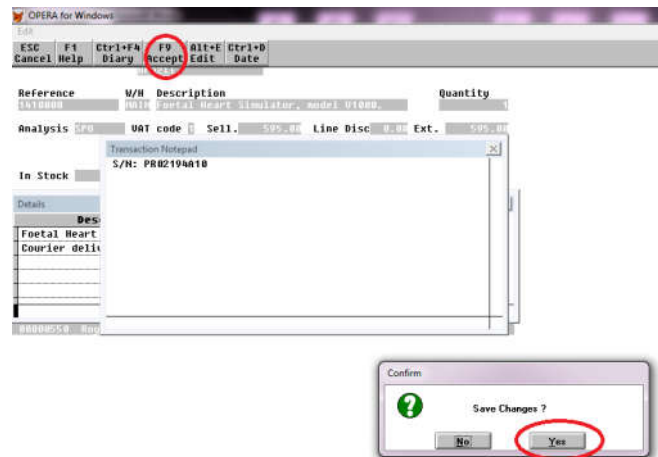
Next, the serial numbers need to be typed in the memo for each item sent.

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

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.

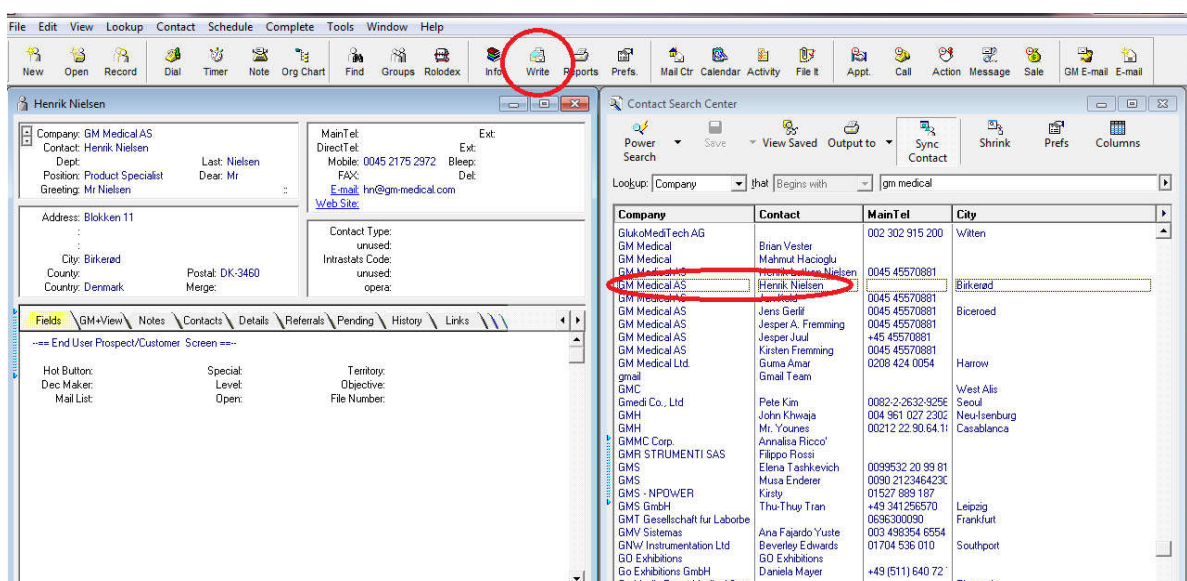


19. When completed, press F9 or click the "F9 Accept" button. You will be asked if you would like to save the changes, click "Yes".

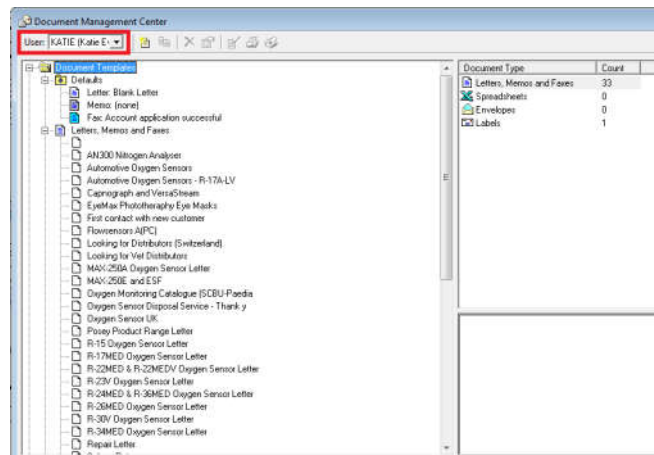


20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

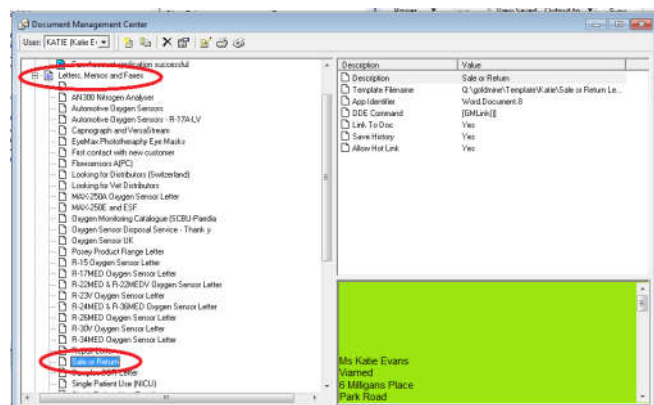
21. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button



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.

Mr Henrik Nielsen
Product Specialist
GM Medical AS
Blokken 11
Birkedal, 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

Katie Evans
Office Administrator

U

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"

OPERA for Windows

File Edit

ESC Cancel F1 Help Ctrl+F4 Diary Ctrl+F5 Calculator Ctrl+F7 About Ctrl+F8 Date Ctrl+F9 E-Mail Ctrl+F10 Web Site Ctrl+F11 Viewer

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

Account 00007327

Customer GM Medical A/S

Address Blokken 11
DK-2460 Birkerød
Denmark

Postcode

Telephone +45 45570881
Facsimile +45 45570650

Accts Contact
Order Contact

Ledger A/c 10007327 GM Medical A/S
Invoice A/c

Currency USD
*** See Memo ***

Curr Bal	0.00
Order Bal	0.02
Turnover	0.00
Credit Limit	/
Last Invoice	/
Last Receipt	/
First Created	13/12/07
Last Modified	02/06/15

Options Terms Analysis Delivery VAT

The screenshot displays the SAP S/4HANA Fiori 'Logistics' dashboard. At the top, there is a navigation bar with icons for various SAP functions. Below this, the dashboard is organized into several blue-tinted cards, each representing a different logistics module. The 'Inventory Management' card is highlighted with a red circle, indicating the selected area. The 'Inventory Management' card lists options like '3D Bin Packing', 'Import Tracking Numbers', 'Royal Mail International services', 'IP's Shipping Calculations', and 'IP's Zones'. Other cards include 'MRP Monitor', 'Stock Descriptions', 'Stock Prices', 'Purchasing', 'WMS Used Stock', 'Shipping Control', 'SAGA Report', 'SAGA Stock', 'Stock Assessment', 'Pricing Checks', 'Stock Take Tools', 'My Stock', 'Scan to My Stock', and 'Inventory Management'.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return							
Please Select with all sale or return grade for							
Product / Unit - Sale or Return Terms and Conditions							
Wanted Product / Unit Feedback Form							
Sale Return Not Sold / by Proposition							
Sale	Product	Channel	Name	Unit	Analysis / Return	Detail	Image
SORT28	00001280	21-Sep-2014	Arsona (General Hospital)	400	new	new	
SORT61	00001290	20-Sep-2015	Arsona (General Hospital)	400	new	new	
SORT42	00002450	23-Feb-2013	Birmingham Hepatobiliary Hospita	400	new	new	
SORT39	00001795	30-Mar-2016	Cardiff Medical (Euro)	400	new	new	
SORT28	00001900	17-Jun-2015	Cardiff Medical Royal Hospital	400	new	new	
SORT28	00001727	22-Jun-2016	St. Andrew's AD	400	new	new	
SORT17	00001724	00-Jan-2014	Wellington (Euro)	400	new	new	

Description: Updates only affect SCR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there

Company	OM Medical A/S
Contact	Henrik Nielsen
Department	
Address	Topskykket 7 Birkedal Denmark
PostCode	3480
	<input type="button" value="Update"/>

ID	Barcode	Purpose of Device
3210070 Silicone Face Mask, Size 0 Tracking3 (D560397)	<input checked="" type="checkbox"/>	<input type="checkbox"/> The trial/testing to be undertaken by the authority (if any)
3210070 Silicone Face Mask, Size 0 Tracking1 (D560397)	<input type="checkbox"/>	<input type="checkbox"/>
3210070 Silicone Face Mask, Size 0 Tracking29 (D560423)	<input type="checkbox"/>	<input type="checkbox"/>
3210070 Silicone Face Mask, Size 0 Tracking10 (D560424)	<input type="checkbox"/>	<input type="checkbox"/>
3210070 Silicone Face Mask, Size 0 Tracking31 (D560425)	<input type="checkbox"/>	<input type="checkbox"/>
0014835 Pulse Oximetry Wrap Sensor EDL03480 (D708188)	<input type="checkbox"/>	<input type="checkbox"/>
0014760 SpO2 Silicone Sensor - Adult EDM00372 (D711777)	<input type="checkbox"/>	<input type="checkbox"/>
0012160 Pulse Oximeter VM 2160 TS100185 (ED42231)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking1 (D896288)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking10 (D896297)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking11 (D896298)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking12 (D896299)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking13 (D896300)	<input type="checkbox"/>	<input type="checkbox"/>
0034493 Disposable SpO2 Sensor-Adult Tracking14 (D896301)	<input type="checkbox"/>	<input type="checkbox"/>
2810006 MARSIMON [®] Value 16450-500881 (D924088)	<input type="checkbox"/>	<input type="checkbox"/>
D012101 Pulse Oximeter KM 2101 D0120120 (D966730)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2810006 MARSIMON [®] PULG 16450-500882 (D924089)	<input type="checkbox"/>	<input type="checkbox"/>
4330002 SpiroTrue AI (PC) Tracking4 (D876162)	<input type="checkbox"/>	<input type="checkbox"/>

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"

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"

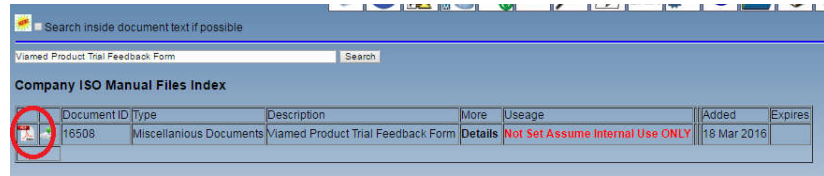
37. Print the delivery note/shipping invoice and print a second copy of the first page.

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.

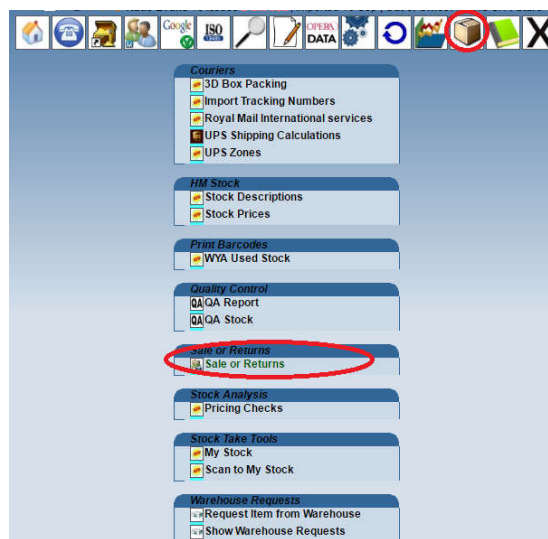
After Checking

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.

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	Nichelle 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	Dr Rhyann Curtin	10012969	Emergency Medical and Retrieval Transfer Service	13/09/16	Show Delivery Note	Steve Hardaker	I've chased this up
SOR747	Mark Elliott	00005130	Torbay Hospital	05/09/16	Show Delivery Note	Steve Hardaker	I've chased this up
SOR746	Foidan Cruz	00007885	Jamjoom Medical Industries	05/09/16	Show Delivery Note	Ryan Swaine	I've chased this up
SOR745	Ahmani Suliman	00000550	Royal Blackburn Hospital	24/08/16	Show Delivery Note		I've chased this up
SOR743	Boya Ward	00002824	Chelsea Westminster Hospital	09/08/16	Show Delivery Note	Katie Evans	02 Sep 2016 Katie Evans
SOR742	Michael Baumann	00007515	Merivaara AB	09/08/16	Show Delivery Note	Katie Evans	02 Sep 2016 Katie Evans
SOR741	Helen Clark	00001900	Gloucestershire Royal Hospital	08/08/16	Show Delivery Note	Emily Hanson	01 Sep 2016 Emily Hanson
SOR739	Silvia Nedea	00006304	Artsana Medical	27/07/16	Show Delivery Note	Emily Hanson	01 Sep 2016 Emily Hanson
SOR737	Tommy Muirhead	00003560	Manchester Royal Infirmary	13/07/16	Show Delivery Note	Steve Hardaker	01 Sep 2016 Katie Evans

- 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.

XX	Production	Production Schedule		106
XX	CE Technical Files	CE Technical Files	1	29
XX	Feedback	Company Innovation		2
XX	Feedback	Customer Feedback Negative	6	157
XX	Feedback	Customer Feedback Positive		107
XX	Feedback	Product Feedback Negative	18	403
XX	Feedback	Product Feedback Positive		134
XX	Feedback	Product Innovation	1	3
XX	Feedback	Systems Innovation		2
XX	Feedback	VIAMED Feedback	1	182
XX	Product Categories	Oxygen Hoods		9
XX	Product Categories	Product Categories		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.

OPERA for Windows

File Edit

ESC F1 F2 F4 F5 F6 F9 F11 F12 TAB
Cancel Help Print Delete/Undelete New Edit Order View Memo More----

Find Previous Next

Account 00007327 Currency USD
Customer: GH Medical A/S *** See Memo ***

Memo	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
Memo	D0C97323	22/06/16	Quote	QU004278	22/06/16	SOR729	Printed

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.

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 Delivery GH Medical A/S
GH Medical A/S Blokken 11
3460 Birkerød Denmark

Cust Ref SOR729 * See Memo * Document D0C97323 22/06/16
Due 22/06/16 Quote QU004278 22/06/16

Priority 3 W/House MAIN Main Warehouse

Raised By KATIE

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

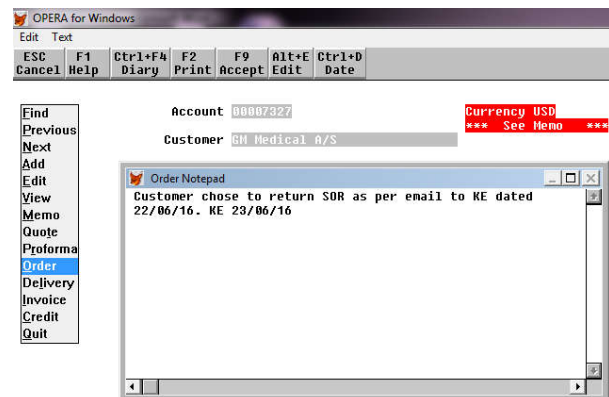
Analysis Currency Discount

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.