

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

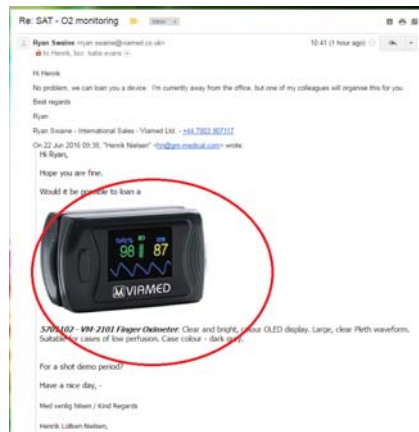
Paperwork Checklist

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

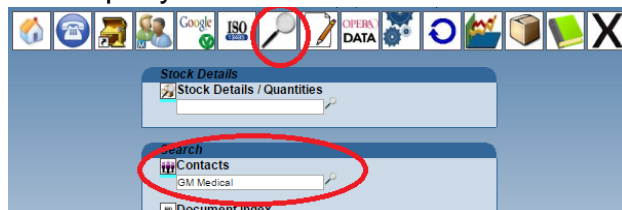
VM3COP20.13 Sending Sale or Return Orders

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
Error! Objects cannot be created from editing field codes.
4. Click on the required name
Error! Objects cannot be created from editing field codes.
5. Click on the Sale or Return icon
Error! Objects cannot be created from editing field codes.
6. Click, "Add New Sale/Return"
Error! Objects cannot be created from editing field codes.

This will direct you to the main sale/return page and create a new record for the contact
Error! Objects cannot be created from editing field codes.

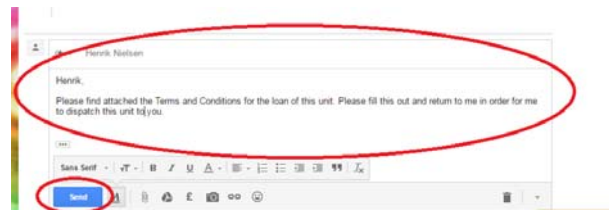
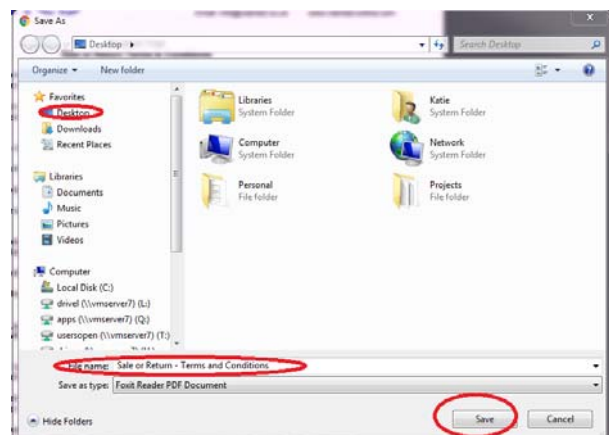
- Click 'Product Trial – Sale or Return Terms and Conditions'
Error! Objects cannot be created from editing field codes.

- Click the PDF icon to open the file
Error! Objects cannot be created from editing field codes.

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

Error! Objects cannot be created from editing field codes.

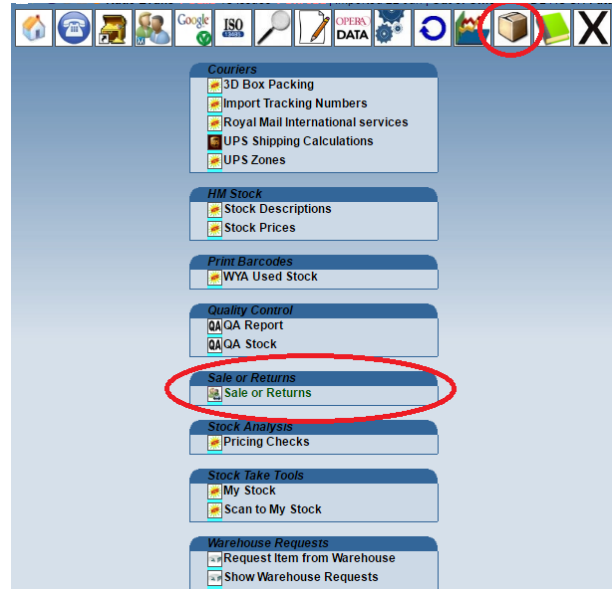
- When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'



- 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	Serialnumber	Stock Ref	Description
88186	EDL01489	0014835	Pulse Currency Wrap Sensor
88288	Tracking1	0014993	Disposable SpO2 Sensor - Adult
88287	Tracking10	0014993	Disposable SpO2 Sensor - Adult
88298	Tracking11	0014993	Disposable SpO2 Sensor - Adult
88299	Tracking12	0014993	Disposable SpO2 Sensor - Adult
88300	Tracking13	0014993	Disposable SpO2 Sensor - Adult
88301	Tracking14	0014993	Disposable SpO2 Sensor - Adult
88397	Tracking7	0110070	Silicone Face Mask, Size 8
88423	Tracking28	0210070	Silicone Face Mask, Size 8
88424	Tracking30	0210070	Silicone Face Mask, Size 8
88425	Tracking31	0210070	Silicone Face Mask, Size 8
88436	80730145	4410500	Casprograph VM 2500-M
88552	Tracking754433_8	8420012	

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 Stock or Return Location 2024132
Stock Reference 4438888

Issue To: Catherine Spence

Related to Issue

Stock Ref: 4430000

PO Ref:

Opera A/c: 00000002

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.

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.

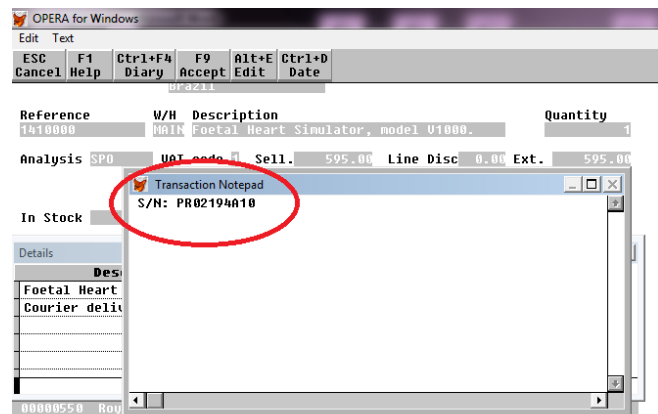
Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

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

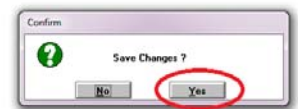
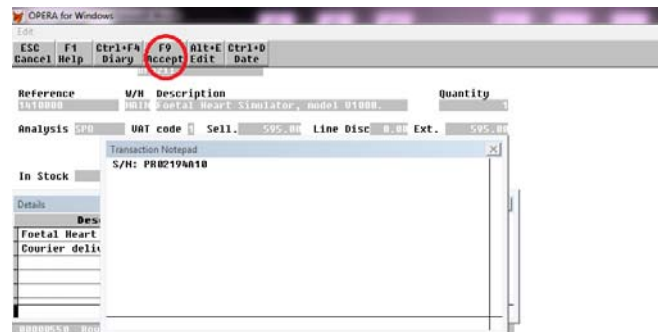
Next, the serial numbers need to be typed in the memo for each item sent.

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

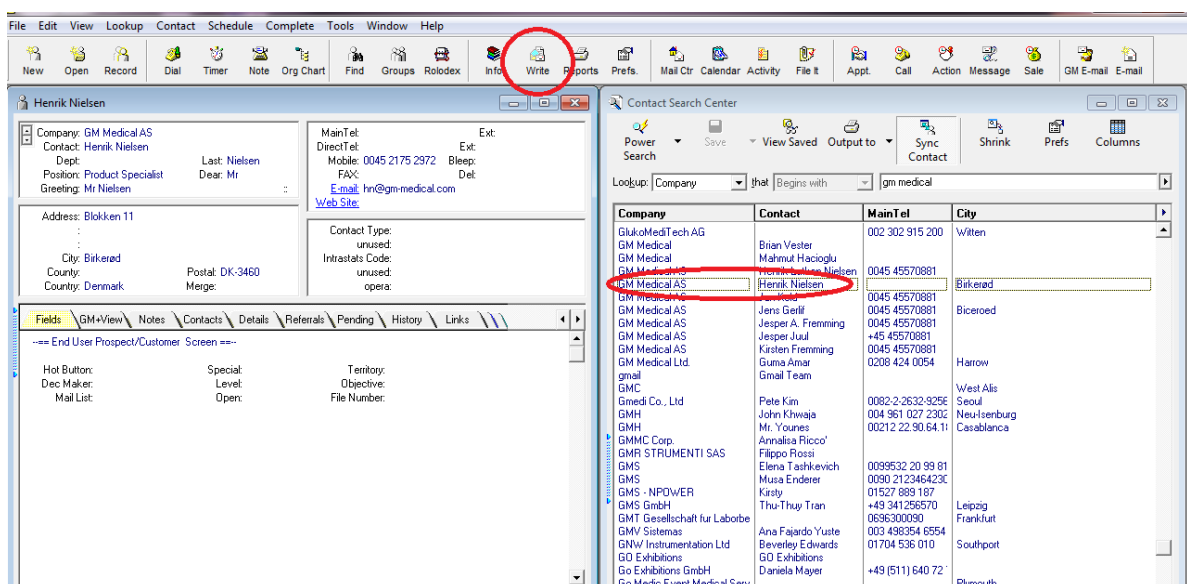
18. Type the serial number in the format as seen to the left, e.g. "S/N: ???". There may be additional notes here, if so, add the serial number beneath them.



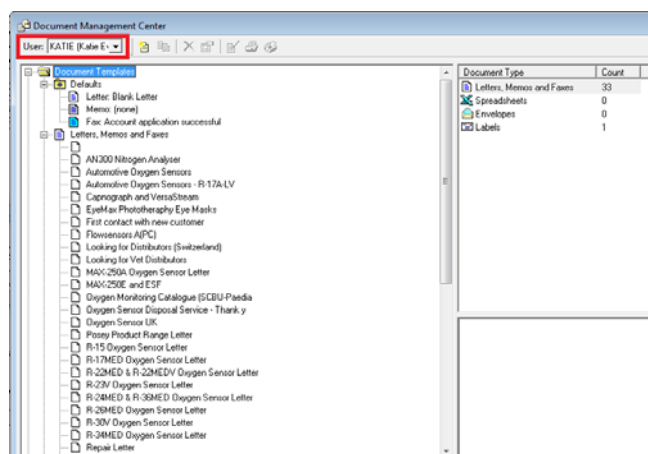
19. When completed, press F9 or click the "F9 Accept" button. You will be asked if you would like to save the changes, click "Yes".



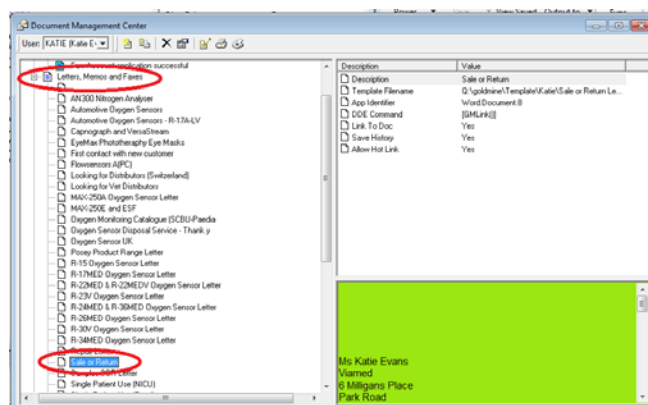
20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.
21. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button



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
Birkelund, 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

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 U 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"

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

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 Order Contact Quit

Account 00007327 Currency USD *** See Memo ***

Customer GM Medical A/S

Address Blokken 11 DK-3460 Birkerød Denmark

Postcode

Telephone +45 45570881 Credit Limit

Facsimile +45 45570650 Last Invoice

Accts Contact Last Receipt 13/12/07

Order Contact Last Modified 02/06/15

Ledger A/c 10007327 GM Medical A/S

Invoice A/c

Options Terms Analysis Delivery VAT

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

Intrastats

- 3D Box Packing
- Import Tracking Numbers
- Royal Mail International services
- UPS Shipping Calculations
- UPS Zones
- My Stock
- Stock Descriptions
- Stock Prices
- WMA Used Stock
- QA/QA Report
- QA/QA Stock
- Sale or Returns
- Stock Analysis
- Pricing Checks
- Stock Take Mode
- My Stock
- Scan to My Stock
- Warehouse Requests
- Request Item from Warehouse
- Show Warehouse Requests

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

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Start with all sale or return goods for Product Trial - Sale or Return Terms and Conditions Wanted Product Trial Feedback Form

Sale Returns Not Sent - In Preparation

SOR	Product	Customer	Name	Add	Shipping	Notes
SOR028	00002350	01Dec2014	Axelstad General Hospital	+	0.00	
SOR082	00002350	03Dec2015	Axelstad General Hospital	+	0.00	
SOR042	00004000	23Feb2016	Birmingham Heartlands Hospital	+	0.00	
SOR036	00007998	09Mar2016	Christians Medical (Euro)	+	0.00	
SOR728	00001900	17Jun2016	Gloucestershire Royal Hospital	+	0.00	
SOR729	00007327	23Jun2016	Old Medical A/S	+	0.00	
SOR717	00007374	03May2016	Medwest Ltd (Euro)	+	0.00	

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

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 Topstykke 7 Birkerød Denmark

PostCode 3460

Update

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397) Barcode

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397) Purpose of Device

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580423) The trial/testing to be undertaken by the authority (if any)

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580424)

3210070 Silicone Face Mask, Size 0 Tracking31 (ID580425)

0014835 Pulse Oximetry Wrap Sensor EDL03489 (ID708186)

0014760 SpO2 Silicone Sensor - Adult EDM00372 (ID711777)

0012100 Pulse Oximeter VM 2100 T81000185 (ID842231)

0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID886297)

0034993 Disposable SpO2 Sensor - Adult Tracking10 (ID886297)

0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID886298)

0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID886299)

0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID886300)

0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID886301)

0012101 Pulse Oximeter VM 2101 90800125 (ID69730)

4330002 SpiroTrue Air (PC) Tracking4 (ID76162)

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"

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.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return									
Please Search with all info or where goods for									
Product / Trial - Sale or Return Terms and Conditions									
Viewed Product Trial Feedback Form									
Sale Returns Not Book in Progress									
ROW	ROWID	DATE	NAME	TYPE	STATUS	DATE	DATE	DATE	DATE
SOR729	00000000	23-Jun-2016	72 Bi-chem CR Safe Road	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR728	00000000	23-Jun-2016	Avonlea General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR727	00000000	23-Jun-2016	Avonlea General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR726	00000000	23-Jun-2016	Birmingham Heartlands Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR725	00000000	23-Jun-2016	Cardiff General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR724	00000000	23-Jun-2016	Cardiff General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR723	00000000	23-Jun-2016	Cardiff General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR722	00000000	23-Jun-2016	Cardiff General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016
SOR721	00000000	23-Jun-2016	Cardiff General Hospital	SALE	OK	23-Jun-2016	23-Jun-2016	23-Jun-2016	23-Jun-2016

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.

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

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the

Product Name / Issue or Return / Return to Goods House
 Wanted Product Trial Feedback Form

Sale Returns Not Sent / In Preparation


SO#	Account	Created	Name	ADD	Shipping Notes	Send
SORT28	00002360	01/Dec/2014	Ainsdale General Hospital			
SORT82	00002360	03/Dec/2015	Ainsdale General Hospital			
SORT73	00007356	31/May/2016	Alpa A S			
SORT42	00000490	23/Feb/2015	Birmingham Heartlands Hospital			
SORT05	00007995	30/Mar/2016	Cortessis Medical (Euro)			
SORT17	00007374	03/May/2016	Medivent Ltd (Euro)			
SORT881	00005172	11/Nov/2015	Princess Royal University Hospital			
SORT722	00012966	27/May/2016	Priory Hospital Chelmsford			

39. Click on the PDF icon

Search inside document text if possible

Viamed Product Trial Feedback Form

Company ISO Manual Files Index

	Document ID	Type	Description	More	Usage	Added	Expires
	16508	Miscellaneous Documents	Viamed Product Trial Feedback Form	Details	Not Set Assume Internal Use ONLY	18 Mar 2016	

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.

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'.

Error! Objects cannot be created from editing field codes.

4. Click, 'analyse_sale_return' .

Error! Objects cannot be created from editing field codes.

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.

Error! Objects cannot be created from editing field codes.

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.

Error! Objects cannot be created from editing field codes.

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.

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	DOC97323	22/06/16	Quote	QU004278	22/06/16	SOR729	Printed

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
GH Medical A/S
Blokken 11
3460 Birkerød
Denmark

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

Cust Ref SOR729 * See Memo *
Due 22/06/16
Priority 3
W/House MAIN Main Warehouse

Document DOC97323 22/06/16
Quote QU004278 22/06/16

Raised By KATIE

Comments Henrik Nielson - +45 4557 8881
Goods already supplied on SOR729

Analysis Currency Discount

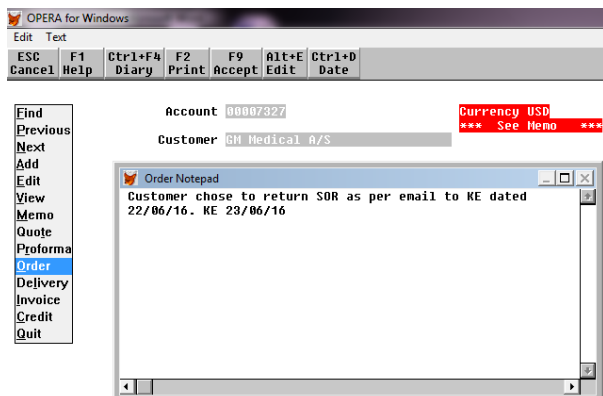
7. Press F9 twice to complete the order.
8. Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR***". Place all of the paperwork in the checking tray. Once checked by a member of the office admin team, take the unticked copy of the ORD to Goods Out as per VM3COP20.05 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".

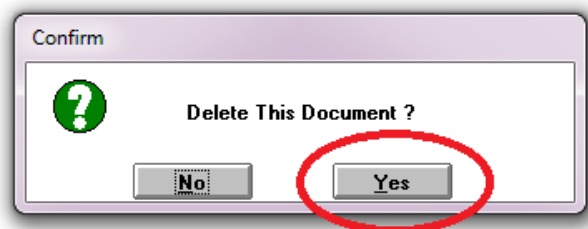
SOR Return

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.