

VM3COP20.13 - Sending SOR's

Checklist

<input checked="" type="checkbox"/>	Director authorisation on SOR request paperwork	See email from SJH to office@viamed.co.uk and issue #204779 - SN approved verbally, I will put my name to it - SJH 26/11/20.
<input checked="" type="checkbox"/>	SOR Terms and Conditions signed by customer	
<input checked="" type="checkbox"/>	SOR number SOR927	
<input checked="" type="checkbox"/>	Items been scanned to SOR	
<input checked="" type="checkbox"/>	Quotation Not required	
<input checked="" type="checkbox"/>	Signed delivery note/shipping invoice Cathy to print from issue #204779 to use as shipping label	
<input checked="" type="checkbox"/>	Second copy of first page of delivery note/shipping invoice	See footnote: attached to issue #204779 as can't currently file
<input checked="" type="checkbox"/>	Feedback form Not required	
<input checked="" type="checkbox"/>	Cover letter on letterhead Not required - please just ensure that they are marked F.O.A. Roger Smith, Neonatal Unit	
<input checked="" type="checkbox"/>	Relevant leaflet and price list Not required	
<input checked="" type="checkbox"/>	Relevant Sales Manager's business card Not required	
<input checked="" type="checkbox"/>	Blue Viamed folder Not required	
<input checked="" type="checkbox"/>	Schedule an issue for follow-up SJH to follow up, also in SOR active list	

Paperwork Checklist

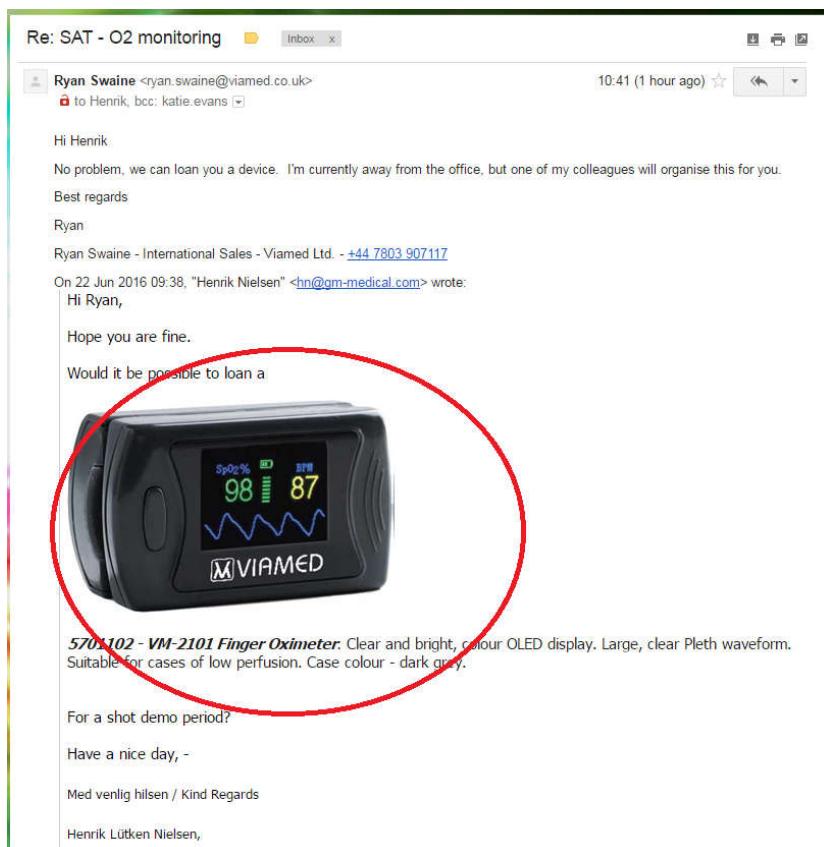
To File	To Ship
Copy of delivery note/shipping invoice	Signed delivery note/shipping invoice CS to print from issue
Signed SOR request paperwork	Cover letter Not required
Quotation	Customer SOR feedback form Not required
Signed Terms & Conditions	Price list Not required
	Leaflet Not required
	Quotation Not required
	Sales Manager's business card Not required
	Blue Viamed folder Not required

Note: due to COVID-19 we are unable to physically file the documentation, so all docs are attached to issue #204779 for reference - SJH 26/11/20

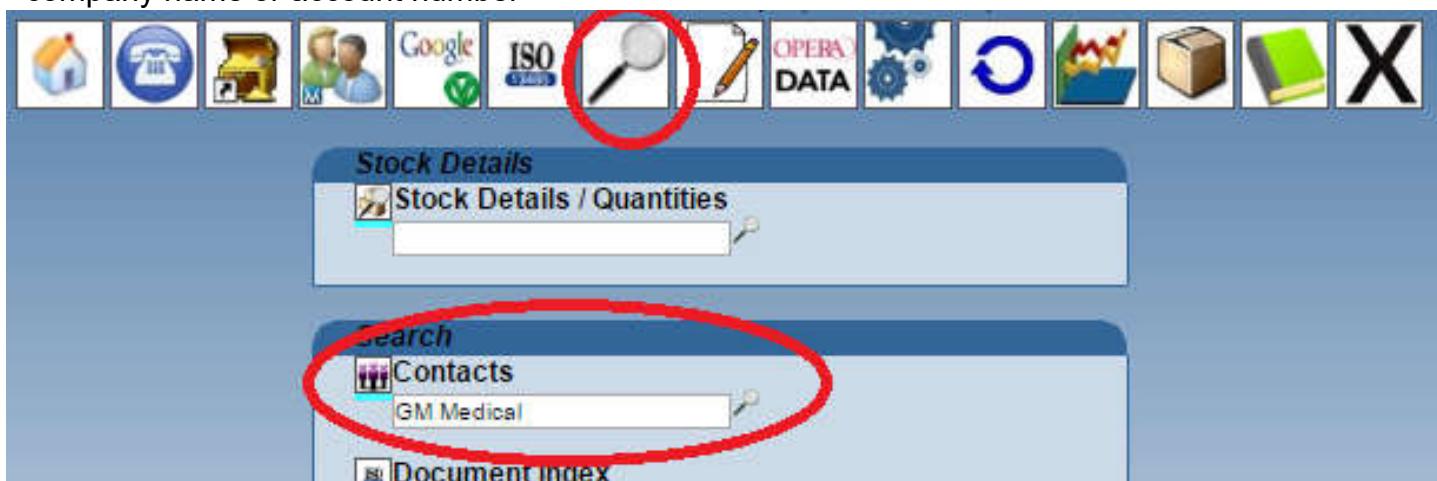
VM3COP20.13
Sending Sale or Return Orders

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 Instrastats, Click on the 'Contacts' search field and type the company name or account number



3. Click the correct account

gm medical

search

** Add New Company / Hospital **

Hospital / Organisation Names

<input type="checkbox"/> 00009300	Contacts #6	Bluepoint Medical GmbH & Co. KG	0049 388 235488029	Supplier	Extra Search	
<input checked="" type="checkbox"/> 00007327	Contacts #5	GM Medical	4545 570 881	Customer		
<input type="checkbox"/> 10007327	Contacts #6	GM Medical A/S	3460	+454 557 0881	Customer End User	
<input checked="" type="checkbox"/> 00007327	Contacts #2	GM Medical A/S	3460	0045 455 70881	Customer End User	
<input type="checkbox"/> 00006249	Contacts #1	Lemon Medical GmbH	Hammelburg, Germany	D-97762	49(0)97 327881510	Customer End User
<input type="checkbox"/> 10006249	Contacts #1	Lemon Medical GmbH	Hammelburg		49(0)97 327881510	Customer End User
<input type="checkbox"/> 10007521	Contacts #1	Mefina Medical GmbH & Co KG	Germany		40699	Customer End User

Request Name/ Company

4. Click on the required name

CID 6382

GM Medical A/S.

Topstykket 7
Birkerød
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 10007327

Company Options

Merge Contacts

Contact	Department	Position	Direct Phone	Email	
<input checked="" type="checkbox"/> Henrik Nielsen			4545 570 881		?
<input type="checkbox"/> Soren Bjerre			4545 570 881		?

History - Switch to Condensed

Ruth Hardaker	ORD75997	09/09/2015	Soren Bjerre	09/09/2015 Ruth Hardaker
Ruth Hardaker	ORD70351	25/09/2014	Henrik Nielsen	25/09/2014 Ruth Hardaker

5. Click on the Sale or Return icon

CID 6382

GM Medical A/S.

Topstykket 7
Birkerød
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 10007327

Henrik Nielsen

ID 12875

Henrik Nielsen
Direct Tel: 45 4557 0881
Goldmine ?

Company Options

Contact Options

History

Ruth Hardaker	ORD70351	25/09/2014	25/09/2014	25/09/2014 Ruth Hardaker
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6. Click, "Add New Sale/Return"

GM Medical A/S. Henrik Nielsen ID 12875

Topstykket 7
Birkerød
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 10007327

Henrik Nielsen
Direct Tel: 45 4557 0881
Goldmine ?

Company Options: [Icons for Company Options] Contact Options: [Icons for 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
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital	[Icon]	[Icon]	[Icon]
SOR682	00002360	03/Dec/2015	Airedale General Hospital	[Icon]	[Icon]	[Icon]
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital	[Icon]	[Icon]	[Icon]
SOR705	0000795	30/Mar/2016	Cortessis Medical (Euro)	[Icon]	[Icon]	[Icon]
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital	[Icon]	[Icon]	[Icon]
SOR729	00007327	22/Jun/2016	GM Medical A/S	[Icon]	[Icon]	[Icon]
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)	[Icon]	[Icon]	[Icon]
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital	[Icon]	[Icon]	[Icon]
SOR722	00012966	27/May/2016	Priory Hospital Chelmsford	[Icon]	[Icon]	[Icon]
SOR627	00000590	24/Nov/2014	Royal Bolton Hospital	[Icon]	[Icon]	[Icon]
SOR671	00003220	19/Aug/2015	Royal Free Hospital	[Icon]	[Icon]	[Icon]
SOR692	00000009	26/Feb/2016	Staff Purchasing account	[Icon]	[Icon]	[Icon]
SOR693	00000009	29/Feb/2016	Staff Purchasing account - KE	[Icon]	[Icon]	[Icon]
SOR724	00004890	16/Jun/2016	Stepping Hill Hospital	[Icon]	[Icon]	[Icon]
SOR674	00002130	08/Sep/2015	University Hosp of Hartlepool	[Icon]	[Icon]	[Icon]
SOR718	00000002	09/May/2016	Viamed Ltd	[Icon]	[Icon]	[Icon]
SOR720	00000002	23/May/2016	Viamed Ltd	[Icon]	[Icon]	[Icon]
SOR725	00003450	16/Jun/2016	Whipps Cross University Hospital	[Icon]	[Icon]	[Icon]
SOR726	00003450	16/Jun/2016	Whipps Cross University Hospital	[Icon]	[Icon]	[Icon]
SOR727	00003450	16/Jun/2016	Whipps Cross University Hospital	[Icon]	[Icon]	[Icon]

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
Viamed Product Trial Feedback Form

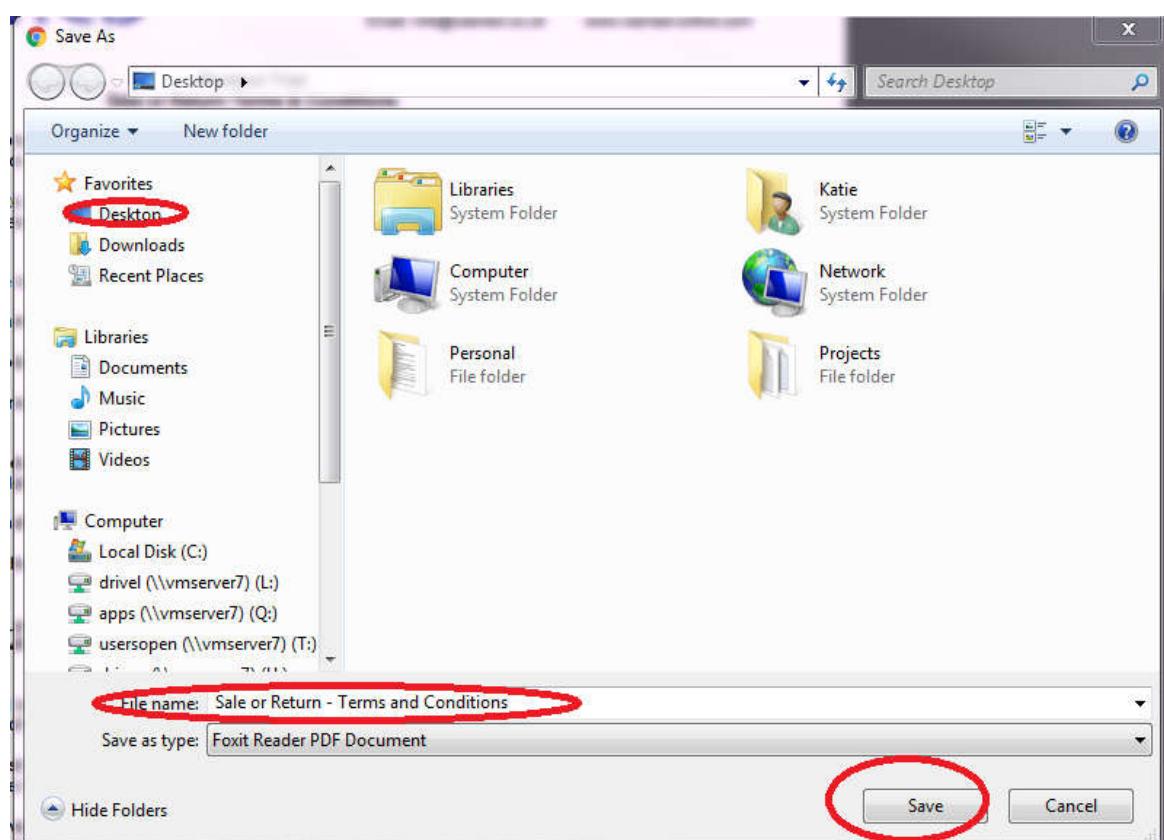
8. Click the PDF icon to open the file

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

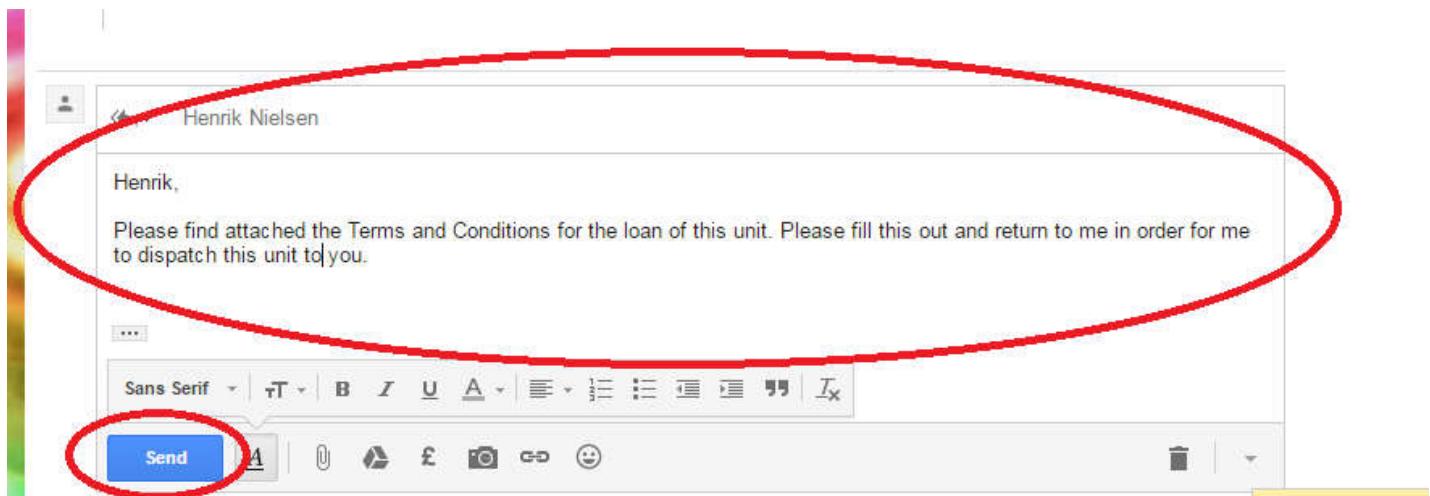
9. When the file opens, click on the download icon located at the top-right of the screen



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

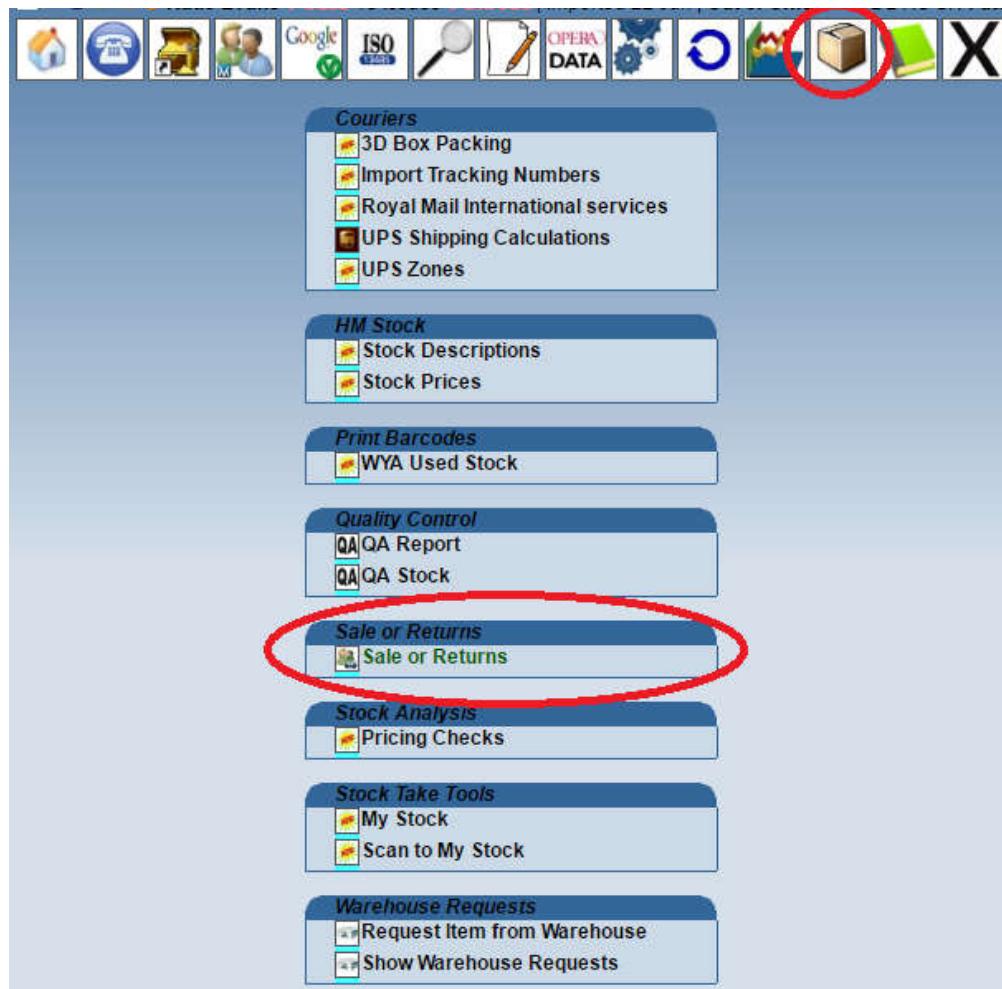


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email below.



Requesting Stock Movement

12. Return to Instratats 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
708186	EDL03489	0014835	Pulse Oximetry Wrap Sensor
366288	Tracking1	0034993	Disposable SpO2 Sensor - Adult
366297	Tracking10	0034993	Disposable SpO2 Sensor - Adult
366298	Tracking11	0034993	Disposable SpO2 Sensor - Adult
366299	Tracking12	0034993	Disposable SpO2 Sensor - Adult
366300	Tracking13	0034993	Disposable SpO2 Sensor - Adult
366301	Tracking14	0034993	Disposable SpO2 Sensor - Adult
580397	Tracking3	3210070	Silicone Face Mask, Size 0
580423	Tracking29	3210070	Silicone Face Mask, Size 0
580424	Tracking30	3210070	Silicone Face Mask, Size 0
580425	Tracking31	3210070	Silicone Face Mask, Size 0
908436	90730145	4410500	Capnograph VM 2500-M
965552	Tracking754433_0	4420512	

Request New Stock Item to be scanned to Sale or Returns

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 Returns Location **ID34132**
Stock Reference : **4430000**

Issue To: **Catherine Spence** (circled)
Related to Issue
Stock Ref: **4430000** (circled)
PO Ref: **00000002** (circled)
Opera A/c: **00000002** (circled)
Mark as Important
Mark as Read only

Add Issue (circled)

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.

The screenshot shows a software interface for managing issues. At the top, there's a header with the issue ID '#73437' and a button to 'Mark as read, no further action at this time'. Below the header, there's a detailed view of the issue, including the subject 'Request Scanning Item to Sale or return', the meeting 'VIAMED Stock Meeting Sale or Returns', and the user 'Catherine Spence'. The note section is highlighted with a red box, containing the text '22 Jun 2016 Catherine Spence. id 959730.' The interface also includes sections for 'New Notes', 'Subject', 'Hide Issue Until', 'Meeting', 'Create', 'Link to Issue #', 'Related Issue', 'Attach', 'Complete ISSUE', 'Urgent', 'Only change Next action if moving the Issue to a new user and not replying to Katie Evans.', 'Next Action' (set to 'Catherine Spence'), 'Priority' (set to 5), and a 'Confirm I have updated the Issue - users will be alerted to the update' button. At the bottom, there's a table titled 'Combined Issues Notes (Comment order might be out of context - Read Original Issue to be sure)' showing a history of notes and actions.

Issue	Date	User	Action / Notes
73437	22/06/16 01:22:34 PM	Katie Evans	Added by Katie Evans sent to Catherine Spence Please scan to Sale or Returns Location ID34132 Stock Reference: 0012101 New Issue
73437	22/06/16 03:41:20 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:20 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:29 PM	Catherine Spence	Re-Read
73437	22/06/16 03:41:29 PM	Catherine Spence	id 959730 Completed
73437	22/06/16 03:41:29 PM	Catherine Spence	id 959730
73437	23/06/16 05:13:19 PM	Katie Evans	Re-Read

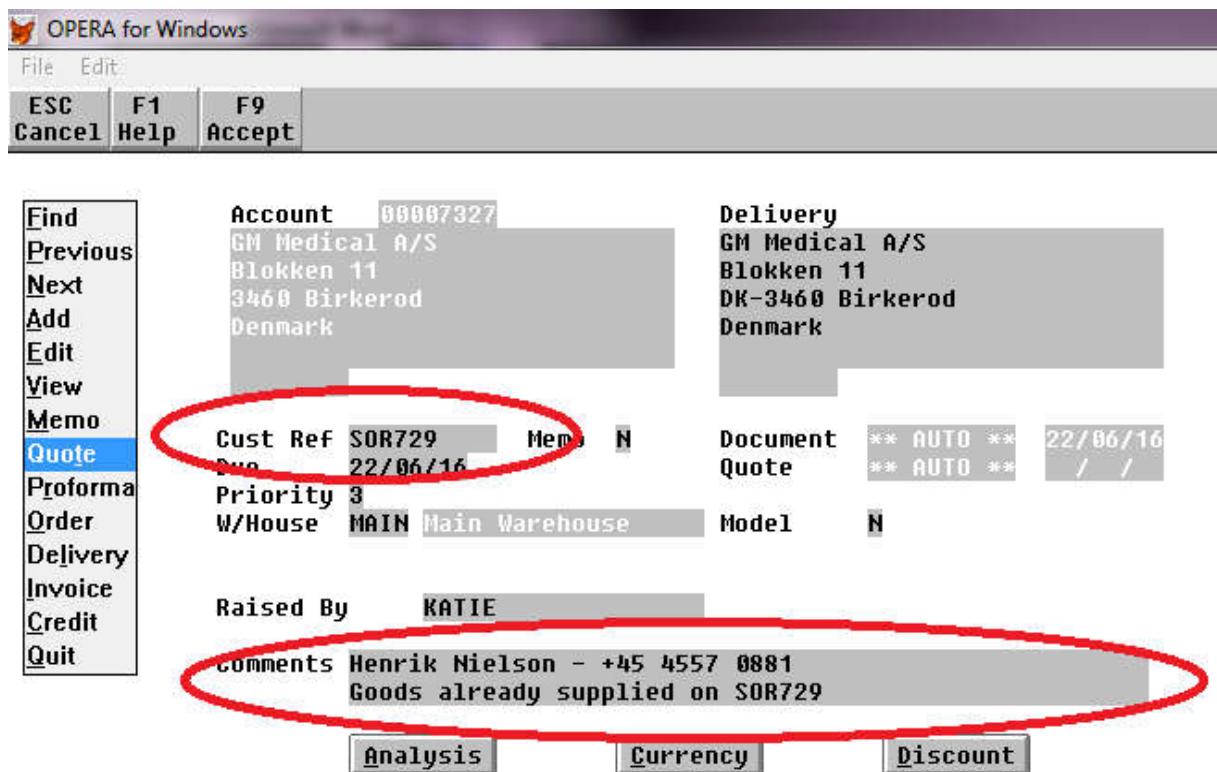
16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.

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

The screenshot shows a software interface for managing sales and returns. The title bar says 'Add a New Sale / Return Completed Sale / Returns analyse_sale_return'. Below the title, there's a note: 'Please Send with all sale or return goods the'. A link 'Product Trial - Sale or Return Terms and Conditions' is available. The main area shows a table of sales and returns. The table has columns: SOR, Account, Created, Name, Add, and Shipping Notes. The 'SOR' column contains values like 'SOR628', 'SOR682', 'SOR642', 'SOR705', 'SOR729', and 'SOR717'. The 'Name' column lists various hospital names. The 'Add' column contains icons for adding items. The 'Shipping Notes' column contains icons for export and a flag. A red circle highlights the 'SOR729' row.

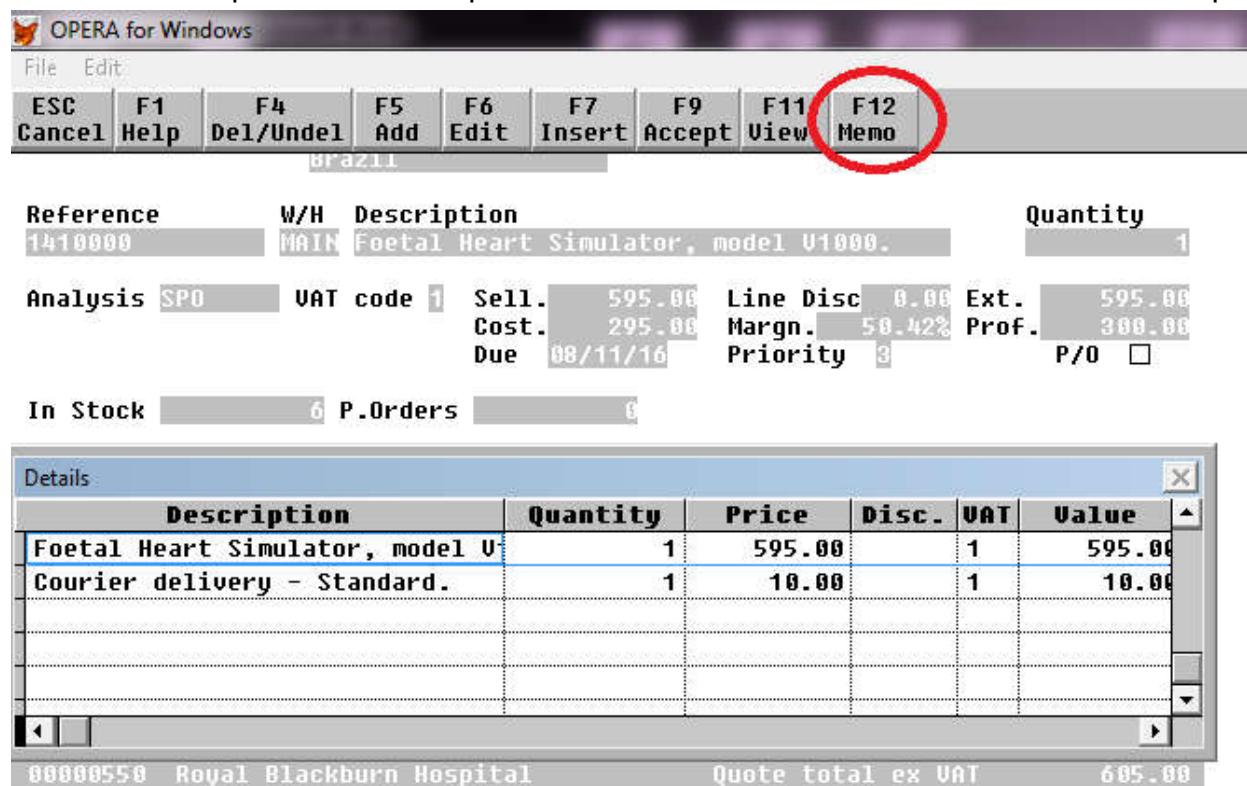
SOR	Account	Created	Name	Add	Shipping Notes
SOR628	00002360	01/Dec/2014	Airedale General Hospital		
SOR682	00002360	03/Dec/2015	Airedale General Hospital		
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital		
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)		
SOR729	00001900	17/Jun/2016	Gloucestershire Royal Hospital		
SOR729	00007327	22/Jun/2016	GM Medical A/S		
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)		

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

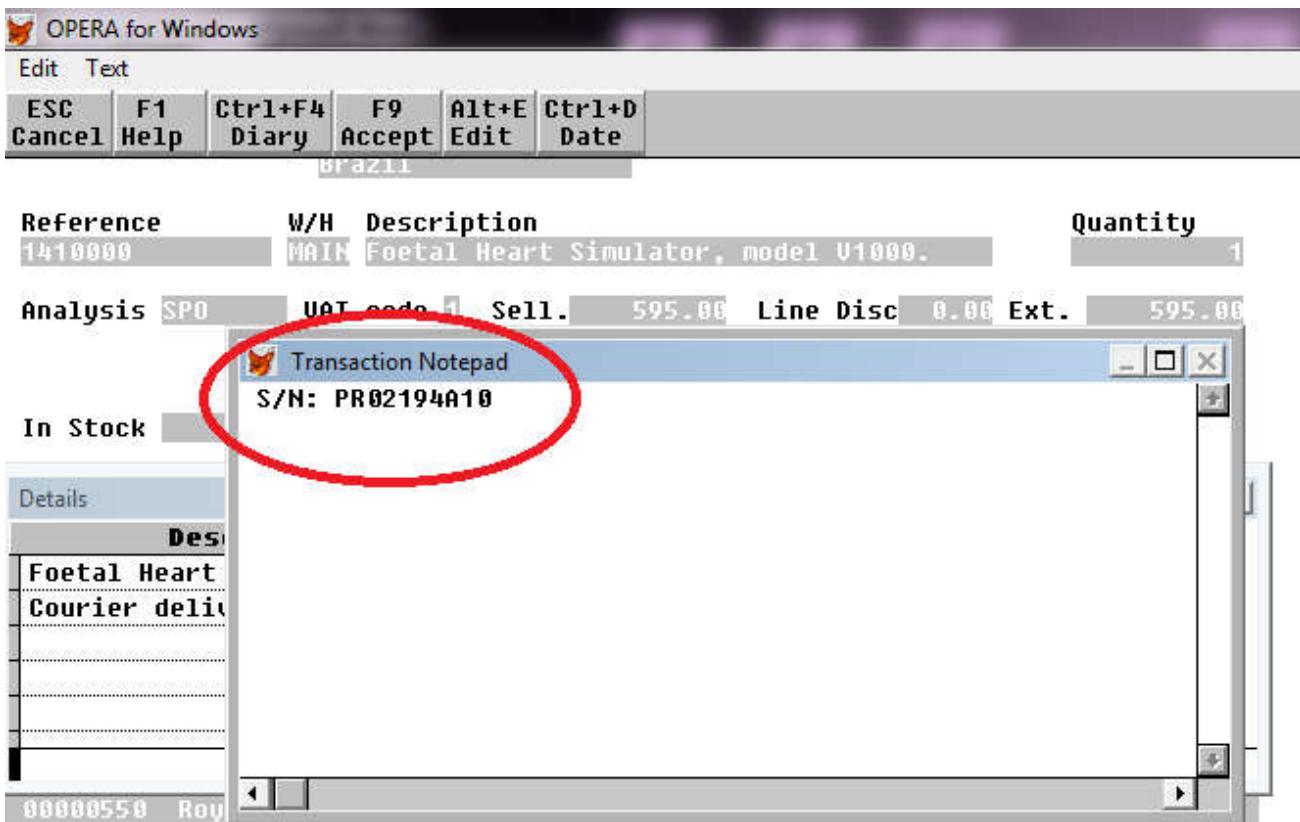


Next, the serial numbers need to be typed in the memo for each item sent.

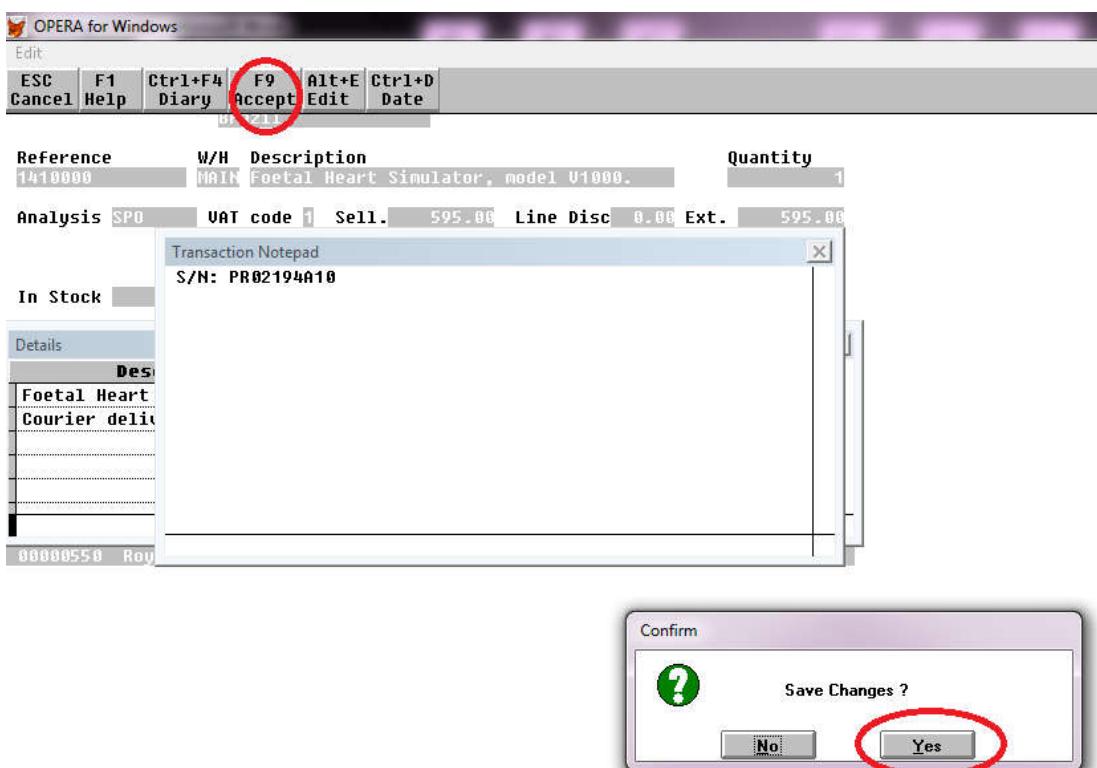
17. Click on the product line and press F12 or click the "F12 Memo" button. This will open the memo.



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

The screenshot shows the GoldMine interface. On the left, a customer record for 'Henrik Nielsen' is displayed, including fields for Company, Contact, MainTel, and Address. On the right, the 'Contact Search Center' window is open, showing a list of contacts from 'GM Medical AS' and other companies. The contact 'Henrik Nielsen' is highlighted in the list. A red circle is drawn around the 'Write' button in the toolbar at the top of the main window.

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.

The screenshot shows the 'Document Management Center' window. On the left, a tree view shows 'Letters, Memos and Faxes' expanded, with 'Sale or Return' highlighted. A red circle is drawn around this item. On the right, a properties dialog is open for the 'Sale or Return' letter, showing fields like Description, Template Filename, and App Identifier. The 'Value' column for 'Description' shows 'Sale or Return'. A red circle is also drawn around the 'Description' field. The bottom right corner of the dialog shows a preview of the letter content: 'Ms Katie Evans, Viamed, 6 Milligans Place, Park Road'.

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.

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.

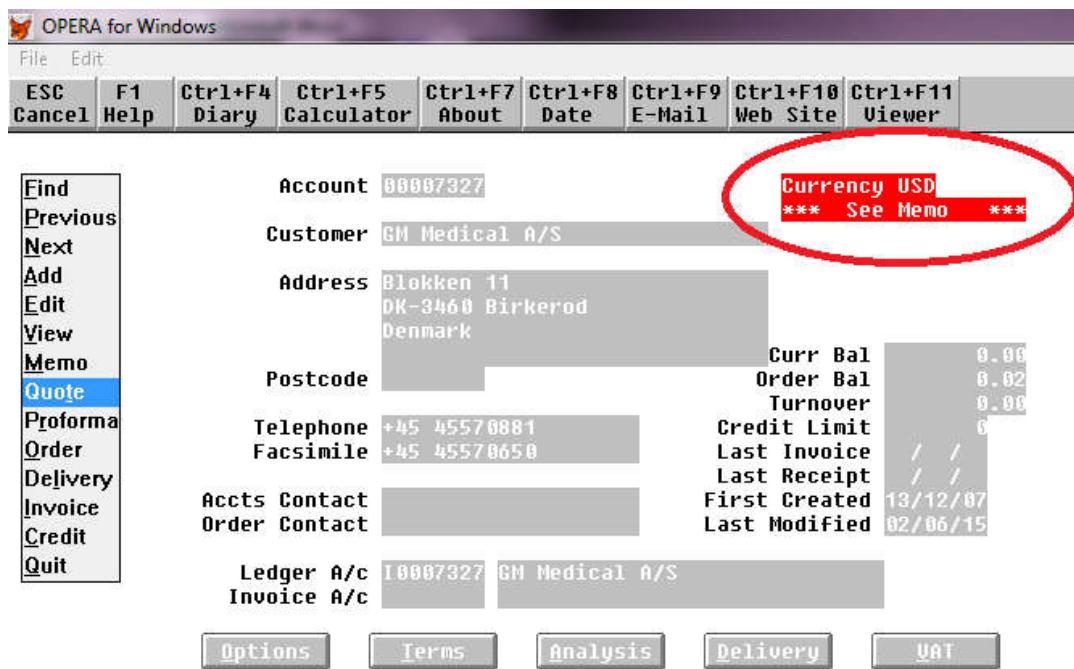
Yours sincerely

Katie Evans
Office Administrator

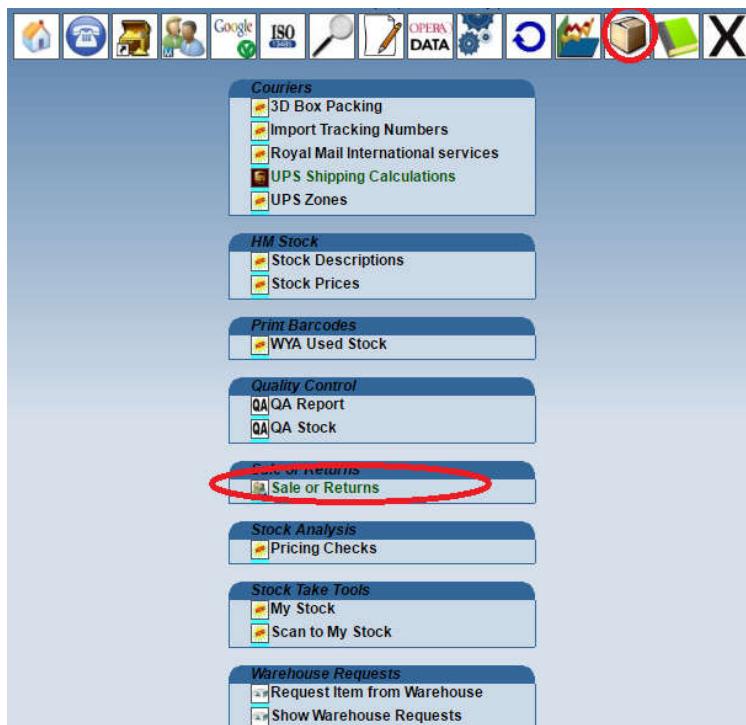
25. When complete, print one copy of this letter on letterhead and save to U drive>current year>current month, with the following format:

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.



27. Return to the main SOR page located in Instrastats>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.

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
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital			
SOR682	00002360	03/Dec/2015	Airedale General Hospital			
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital			
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)			
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital			
SOR729	00007327	22/Jun/2016	GM Medical A/S			
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)			

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	Topstykket 7 Birkeroed Denmark
PostCode	3480
<input type="button" value="Update"/>	
Barcode	
Purpose of Device The trial/testing to be undertaken by the authority (if any)	
3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397) 3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397) 3210070 Silicone Face Mask, Size 0 Tracking29 (ID580423) 3210070 Silicone Face Mask, Size 0 Tracking30 (ID580424) 3210070 Silicone Face Mask, Size 0 Tracking31 (ID580425) 0014835 Pulse Oximetry Wrap Sensor EDL03489 (ID708188) 0014750 SpO2 Silicone Sensor - Adult EDM00372 (ID711777) 0012160 Pulse Oximeter VM 2160 T81000185 (ID842231) 0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID866288) 0034993 Disposable SpO2 Sensor - Adult Tracking10 (ID866297) 0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID866298) 0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID866299) 0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID866300) 0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID866301) 2810008 MD300C52 Yellow 154802500981 (ID824088) 0012101 Pulse Oximeter VM 2101 90800125 (ID959730) 4330002 SpiroTrue A(PC) Tracking3 (ID970101) 4330002 SpiroTrue A(PC) Tracking4 (ID976162)	

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".

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	Hennik Nielsen
Department	
Address	Topstykket 7 Birkerod Denmark
PostCode	3460
<input type="button" value="Update"/>	

0012101 Pulse Oximeter VM 2101 90800125 (ID950730)

Finger Pulse Oximeter	Purpose of Device
Sale or Return trial to determine suitability prior to purchase	The trial/testing to be undertaken by the authority (if any)
<input type="button" value="Loan"/>	<input type="button" value="Submit"/>

Current Items on sale Return id #729
[Print](#) [Print Picking List](#)

Stock Ref	Serial number	Barcode	Description	Type

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.

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

Company	Merivaara AB
Contact	Michael Baumann
Department	
Address	
PostCode	
Value for Customs if applicable	55
<input type="button" value="Update"/>	

3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397)

Disposable SpO2 Sensor - Adult. Purpose of Device

free of charge sample for evaluation 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
0034993	Tracking22	866309	Disposable SpO2 Sensor - Adult.	g
<input type="button" value="Remove"/> <input type="button" value="Print Delivery Note (Today date)"/> <input type="button" value="Print Delivery Note (Created date)"/>				

35. Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note 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 Send with all sale or return goods the

Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR730	MEDITEX	23/Jun/2016	70 Bir uttom CR datta Road			
SOR628	00002360	01/Dec/2014	Airedale General Hospital			
SOR682	00002360	03/Dec/2015	Airedale General Hospital			
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital			
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)			
SOR728	00001900	17/Jun/2016	Gloucestershire Royal Hospital			
SOR729	00007327	22/Jun/2016	GM Medical A/S			
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)			

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

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

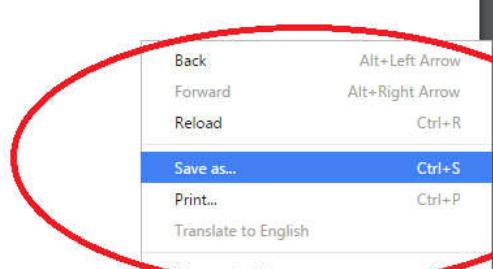
UK: "SOR Delivery Note - *Customer Name* - SOR*** - date backwards"

Viamed Shipping Invoice

Delivery Address: GM Medical A/S Henrik Nielsen Topstykket 7 Birkerod Denmark	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
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Demo products not for resale Value for Customs : \$100.00

Part Number 0012101	Viamed Part Number 0012101	Description Finger Pulse Oximeter Vi ...	Quantity 1	Value \$0.00
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
- Rotate clockwise Ctrl+[

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.

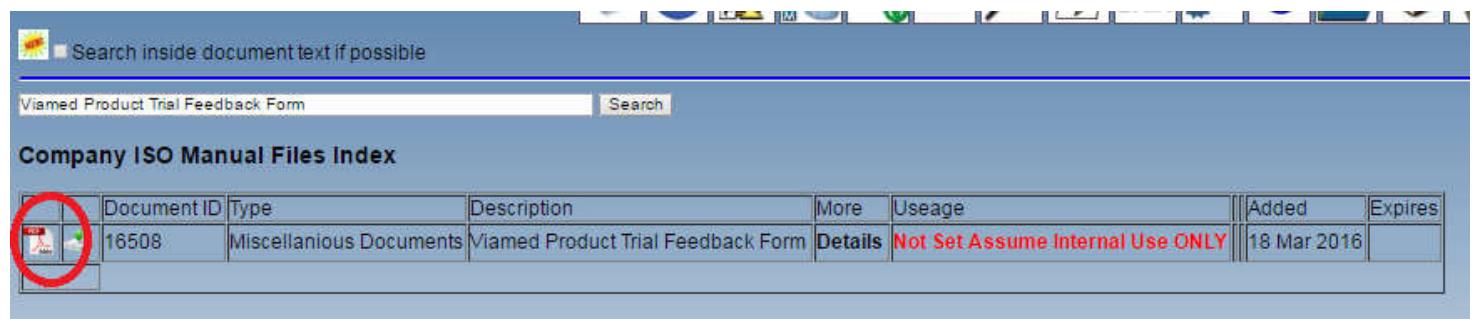
38. On the main Sale Or Return screen, click the link 'Viamed Product Trial Feedback Form'



The screenshot shows a software interface for managing sales and returns. At the top, a blue header bar contains the text 'Add a New Sale / Return' and 'Completed Sale / Returns analyse_sale_return'. Below this, a sub-header in a smaller blue box reads 'Please Send with all sale or return goods the' followed by 'Product Trial Sale or Return Terms and Conditions' and 'Viamed Product Trial Feedback Form'. A red circle highlights the 'Viamed Product Trial Feedback Form' link. The main content area is titled 'Sale Returns Not Sent / In Preparation' and contains a table with columns: SOR, Account, Created, Name, Add, Shipping Notes, and Send. The table lists several entries, each with a small icon and a red circle next to the 'Send' button.

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR628	00002360	01/Dec/2014	Airedale General Hospital			
SOR682	00002360	03/Dec/2015	Airedale General Hospital			
SOR723	00007356	31/May/2016	Asqa A.S			
SOR642	00000490	23/Feb/2015	Birmingham Heartlands Hospital			
SOR705	00007995	30/Mar/2016	Cortessis Medical (Euro)			
SOR717	00007374	03/May/2016	Medivent Ltd (Euro)			
SOR681	00005172	11/Nov/2015	Princess Royal University Hospital			
SOR722	00012966	27/May/2016	Priory Hospital Chelmsford			

39. Click on the PDF icon



The screenshot shows a document viewer interface. At the top, there is a toolbar with various icons. Below the toolbar, a search bar contains the text 'Viamed Product Trial Feedback Form' and a 'Search' button. The main content area is titled 'Company ISO Manual Files Index' and contains a table with columns: Document ID, Type, Description, More, Usage, Added, and Expires. The table lists one entry: Document ID 16508, Type Miscellaneous Documents, Description Viamed Product Trial Feedback Form, More Details, Usage Not Set Assume Internal Use ONLY, Added 18 Mar 2016, and Expires 18 Mar 2016. A red circle highlights the PDF icon in the first row of the table.

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	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.

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 delivery note/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:

Delivery note/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 delivery note/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 delivery note/shipping invoice and initial/date next to it. Return to the person who added the SOR.

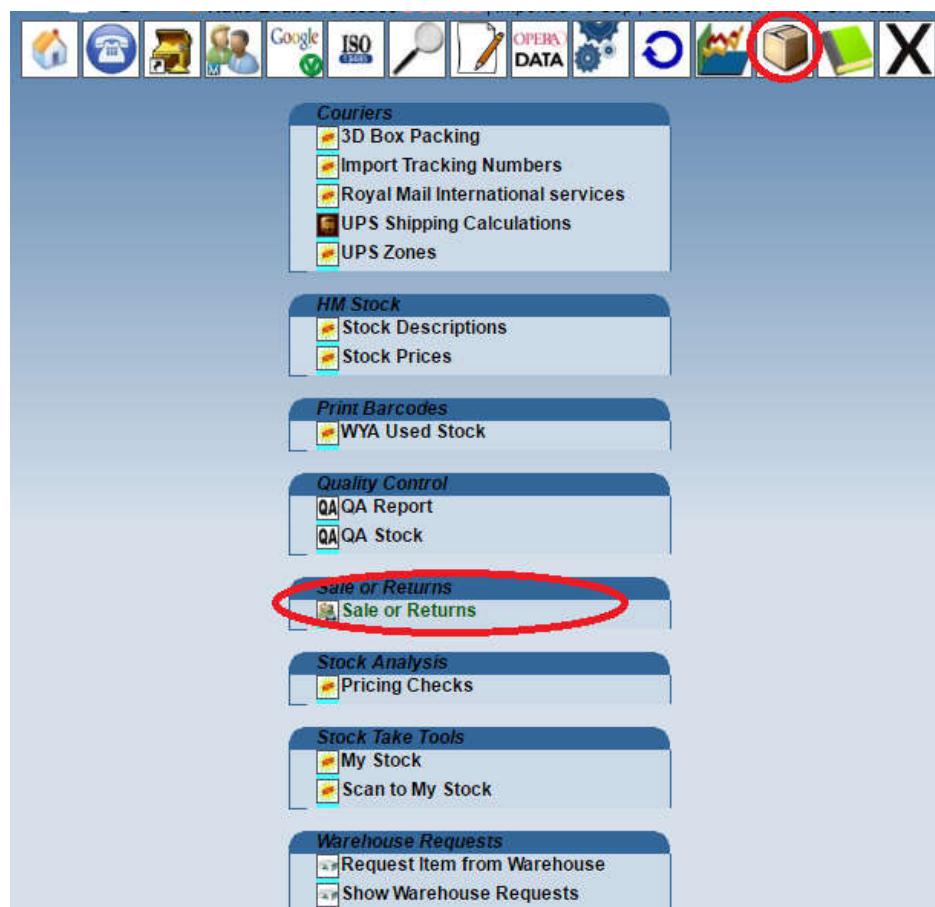
After Checking

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 delivery note and place them in the "Active SOR's" file located in the office.

Put one copy of the **Opera quotation, letter, signed NHS Delivery Note (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' .

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
Viamed Product Trial Feedback Form

Sale Returns Not Sent / In Preparation

SOR	Account	Created	Name	Add	Shipping Notes	Send
SOR753	00001430	16/Sep/2016	Dorset County Hospital			
SOR754	00002662	16/Sep/2016	Liverpool Womens Hospital			
SOR751	00005430	15/Sep/2016	New Cross Hospital			
SOR745	00000550	24/Aug/2016	Royal Blackburn Hospital			
SOR752	00002020	15/Sep/2016	Royal Surrey County Hospital			
SOR750	00004470	15/Sep/2016	Salisbury District Hospital			
SOR733	00004510	06/Jul/2016	Scunthorpe General Hospital			
SOR749	00004735	15/Sep/2016	Southampton General Hospital			

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.

Add a New Sale / Return Completed Sale / Returns

Submit

SOR753	Crystal Durrow	00001430	Dorset County Hospital	16/09/16	Show Delivery Note	
SOR752	Sam Jones	00002020	Royal Surrey County Hospital	15/09/16	Show Delivery Note	
SOR751	Mathy Lowes	00005430	New Cross Hospital	15/09/16	Show Delivery Note	
SOR750	Michelle McQuillin	00004470	Salisbury District Hospital	15/09/16	Show Delivery Note	
SOR749	PAO: Janine Campbell	00004735	Southampton General Hospital	15/09/16	Show Delivery Note	
SOR748	Do Ryan Curtin	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	Oldan Cruz	00007885	Jamjoom Medical Industries	05/09/16	Show Delivery Note	Ryan Swaine
SOR745	Mahani Suliman	00000550	Royal Blackburn Hospital	24/08/16	Show Delivery Note	
SOR743	Reya 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	Artisana 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

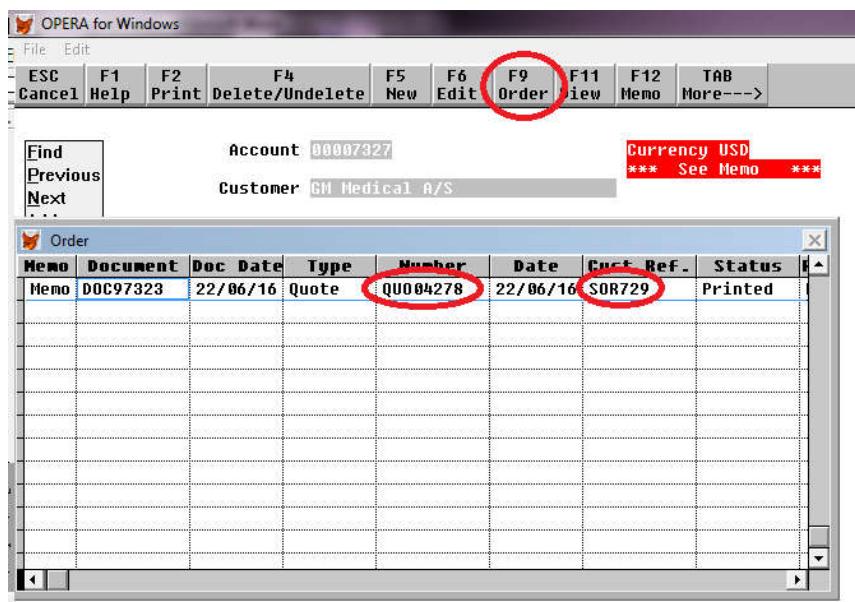
6. When feedback is received, add an issue as per 'Issues Overview' Doc ID: 12395 under the 'Feedback' meeting name, and select either 'Product Feedback Negative' or 'Product Feedback Positive' as appropriate. If the feedback relates to our service, add an issue as per 'Issues Overview' Doc ID: 12395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

M	Production	Production Schedule	106
M	CE Technical Files	CE Technical Files	29
M	Feedback	Company Innovation	2
M	Feedback	Customer Feedback Negative	157
M	Feedback	Customer Feedback Positive	107
M	Feedback	Product Feedback Negative	403
M	Feedback	Product Feedback Positive	134
M	Feedback	Product Innovation	3
M	Feedback	Systems Innovation	2
M	Feedback	VIAMED Feedback	182
M	Product Catagories	Oxygen Hoods	9
M	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.

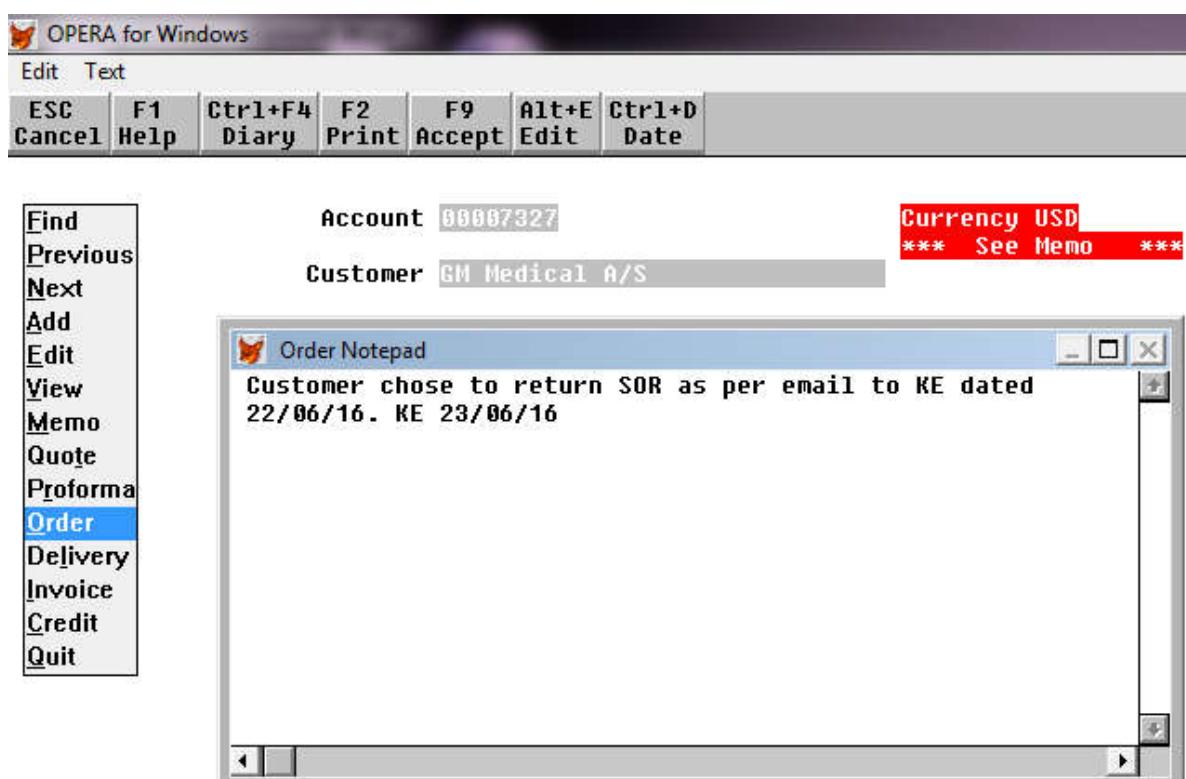


5. Amend the 'Cust Ref' box to the purchase order number and change the 'Due' date to the next available shipping day.
6. A note should have been added at the quote stage, in the 'Comments' section "Goods already supplied on SOR***". Ensure it is still there, if not, add this note.
7. Press F9 twice 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.