

VM3COP20.13 - Sending SOR's

Checklist

| | | |
|---|---|--|
| Y | 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. |
| Y | SOR Terms and Conditions signed by customer | |
| Y | SOR number | SOR927 |
| Y | Items been scanned to SOR | |
| N | Quotation | Not required |
| Y | Signed delivery note/shipping invoice | Cathy to print from issue #204779 to use as shipping label |
| Y | Second copy of first page of delivery note/shipping invoice | See footnote: attached to issue #204779 as can't currently file |
| N | Feedback form | Not required |
| N | Cover letter on letterhead | Not required - please just ensure that they are marked F.O.A. Roger Smith, Neonatal Unit |
| N | Relevant leaflet and price list | Not required |
| N | Relevant Sales Manager's business card | Not required |
| N | Blue Viamed folder | Not required |
| Y | Schedule an issue for follow-up | SJH to follow up, also in SOR active list |

Paperwork Checklist

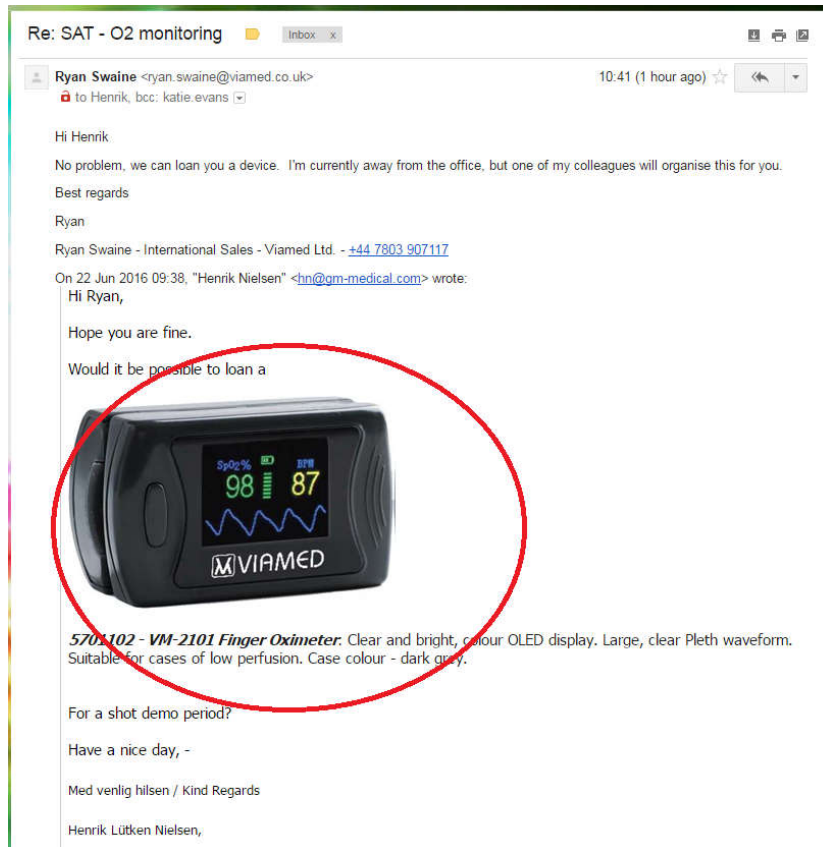
| To File | To Ship |
|--|--|
| Copy of delivery note/shipping invoice | Signed delivery note/shipping invoice CS to print from issue |
| Signed SOR request paperwork | Cover letter Not required |
| Quotation | Customer SOR feedback form Not required |
| Signed Terms & Conditions | Price list Not required |
| | 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

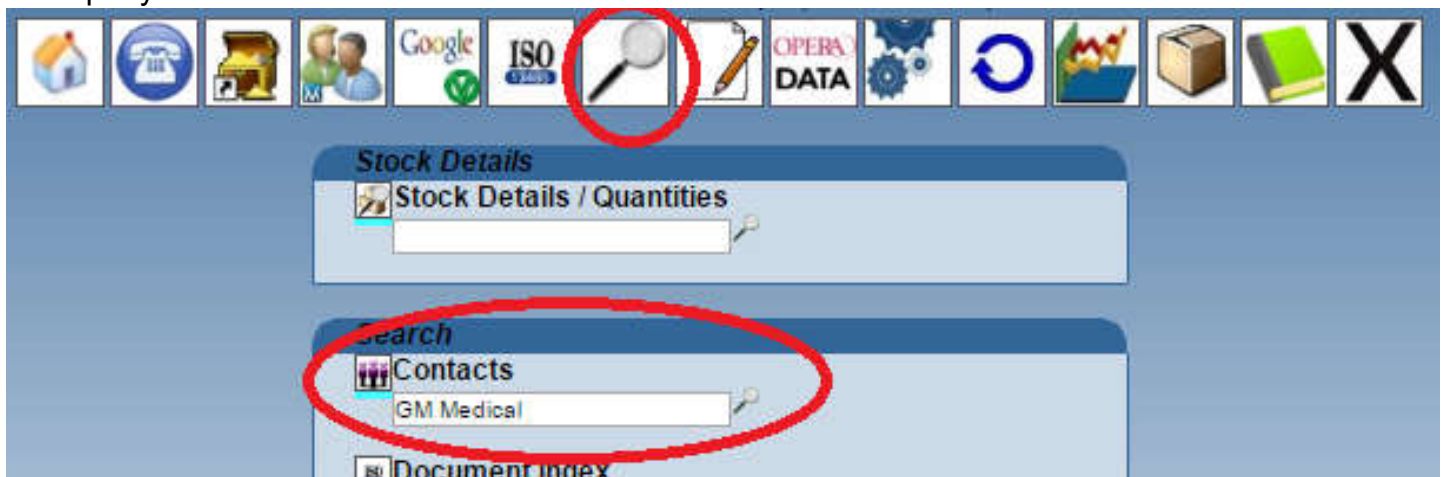
VM3COP20.13 Sending Sale or Return Orders

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 Intrastats, 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 checked="" type="checkbox"/> 00007327 | Contacts #5 | 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 checked="" type="checkbox"/> 00006249 | Contacts #1 | Lemon Medical GmbH | Hammelburg, Germany | D-97762 49(0) 97 327881510 | Customer End User | |
| <input checked="" type="checkbox"/> 00006249 | Contacts #1 | Lemon Medical GmbH | Hammelburg | 49(0) 97 327881510 | Customer End User | |
| <input checked="" type="checkbox"/> 00007521 | 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
Birkeroed
Denmark
3460
Denmark
Tel: 0045 45570881
Opera: 00007327
Type: Customer End User
Invoice Address/Account: 10007327

Company Options

| Contact | Department | Position | DirectPhone | Email | | |
|----------------|------------|----------|--------------|-------|--|---|
| Henrik Nielsen | | | 4545 570 881 | | | ? |
| 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.

Henrik Nielsen

ID 12875

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

Company Options

Contact Options

History

| | | | | |
|---------------|----------|------------|------------|--------------------------|
| Ruth Hardaker | ORD70351 | 25/09/2014 | 25/09/2014 | 25/09/2014 Ruth Hardaker |
|---------------|----------|------------|------------|--------------------------|

6. Click, "Add New Sale/Return"

CID 6382 **GM Medical A/S.** **Henrik Nielsen** ID 12875

Topstykke 7
Birkeroed
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

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 | | | |
| 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) | | | |
| SOR681 | 00005172 | 11/Nov/2015 | Princess Royal University Hospital | | | |
| SOR722 | 00012966 | 27/May/2016 | Priory Hospital Chelmsford | | | |
| SOR627 | 00000590 | 24/Nov/2014 | Royal Bolton Hospital | | | |
| SOR671 | 00003220 | 19/Aug/2015 | Royal Free Hospital | | | |
| SOR692 | 00000009 | 26/Feb/2016 | Staff Purchasing account | | | |
| SOR693 | 00000009 | 29/Feb/2016 | Staff Purchasing account - KE | | | |
| SOR724 | 00004890 | 16/Jun/2016 | Stepping Hill Hospital | | | |
| SOR674 | 00002130 | 08/Sep/2015 | University Hosp of Hartlepool | | | |
| SOR718 | 00000002 | 09/May/2016 | Viamed Ltd | | | |
| SOR720 | 00000002 | 23/May/2016 | Viamed Ltd | | | |
| SOR725 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | |
| SOR726 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | |
| SOR727 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | |

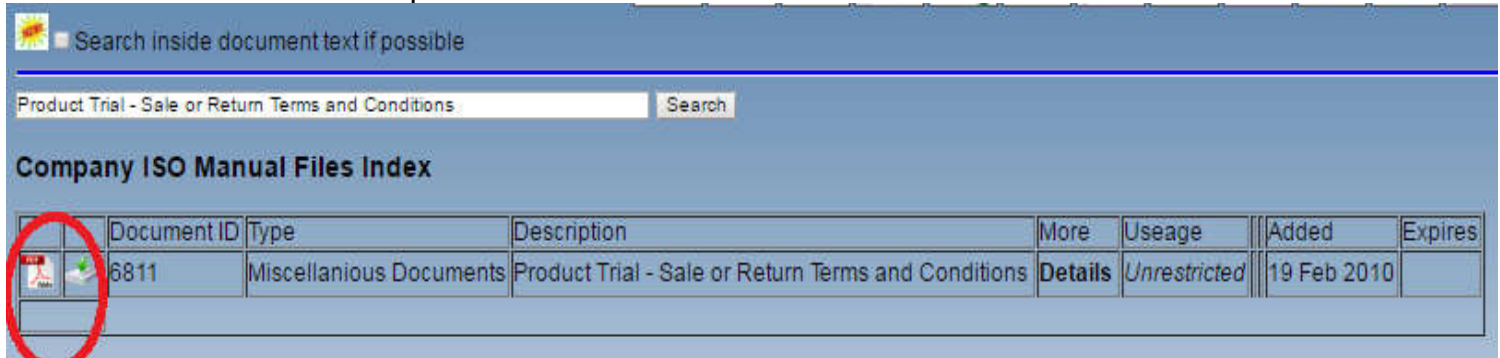
7. Click 'Product Trial – Sale or Return Terms and Conditions

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

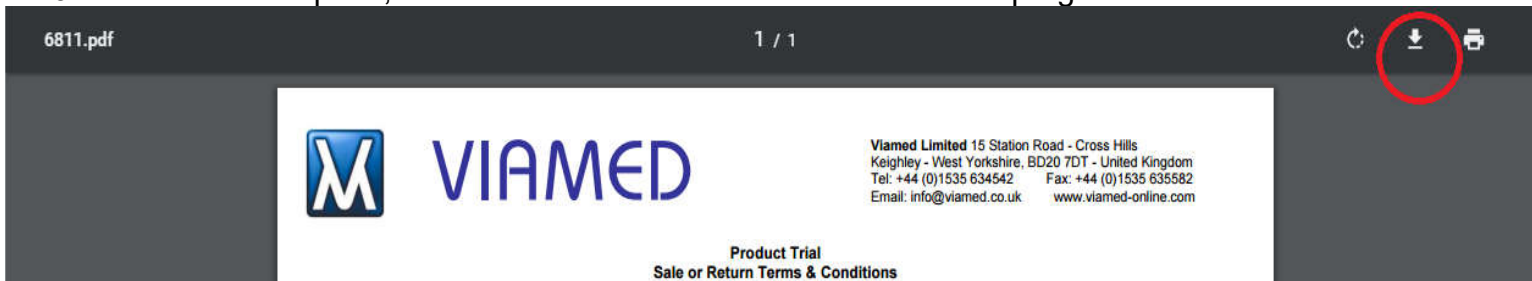
Please Send with all sale or return goods the

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

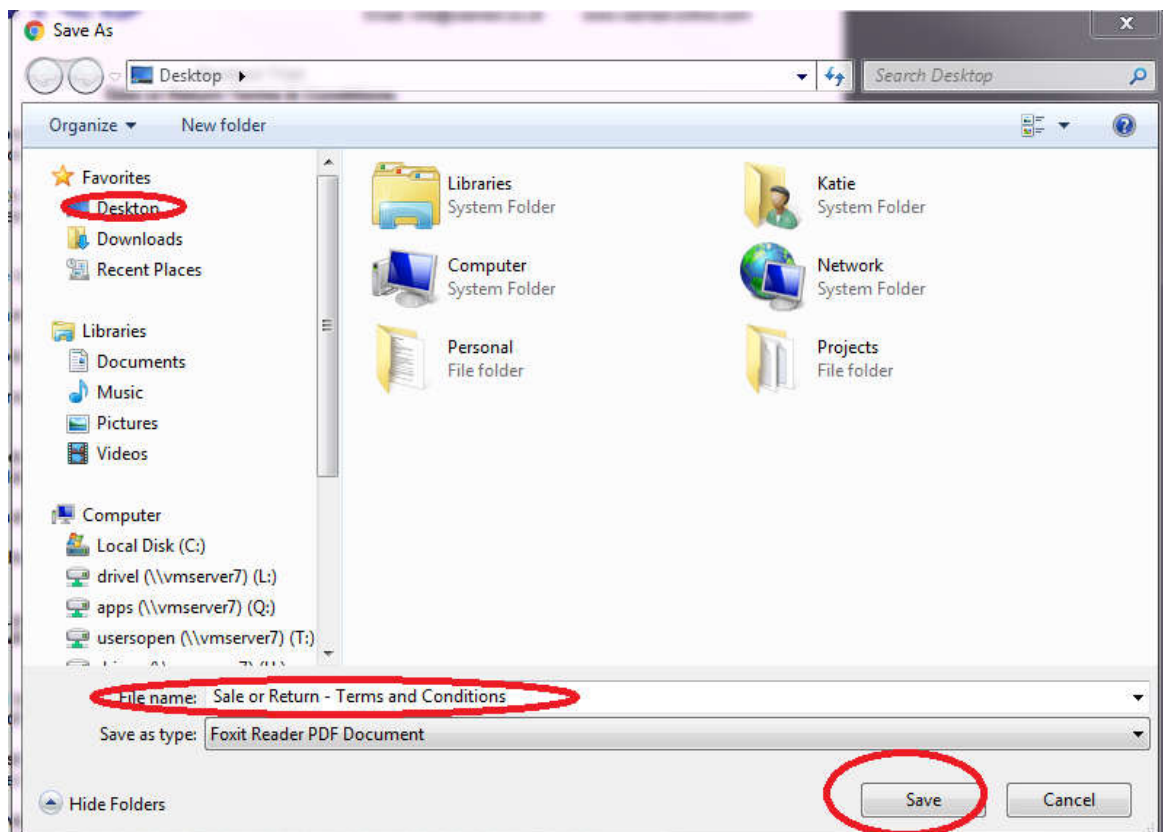
8. Click the PDF icon to open the file



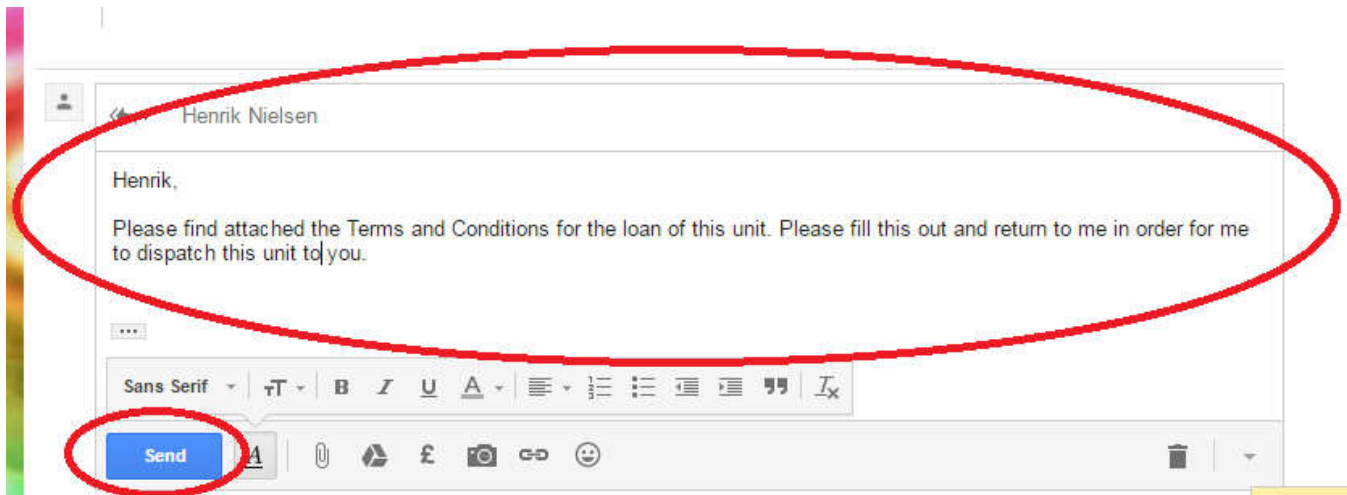
9. When the file opens, click on the download icon located at the top-right of the screen



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

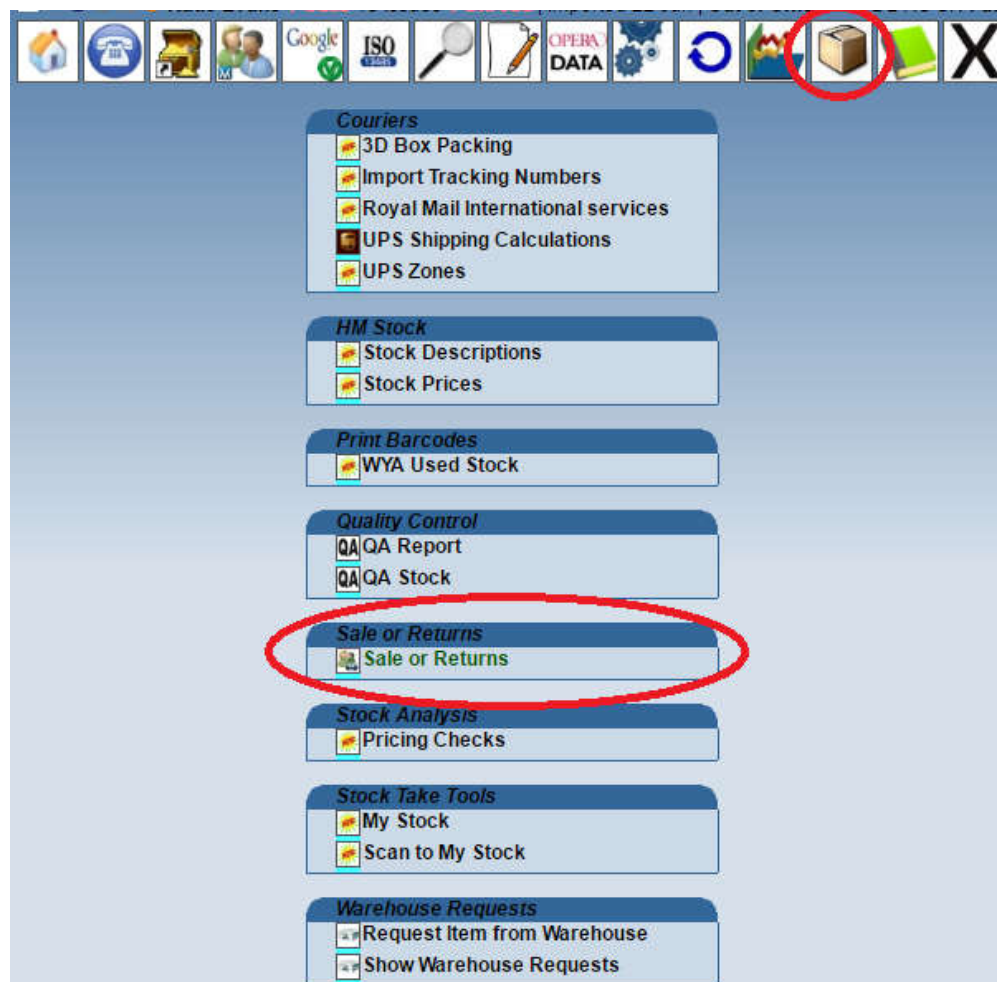


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email below.



Requesting Stock Movement

12. Return to 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".

Stock currently allocated and available to send Sale or Return

| Barcode | Serialnumber | Stock_Ref | Description |
|---------|------------------|-----------|--------------------------------|
| 708186 | EDL03489 | 0014835 | Pulse Oximetry Wrap Sensor |
| 866288 | Tracking1 | 0034993 | Disposable SpO2 Sensor - Adult |
| 866297 | Tracking10 | 0034993 | Disposable SpO2 Sensor - Adult |
| 866298 | Tracking11 | 0034993 | Disposable SpO2 Sensor - Adult |
| 866299 | Tracking12 | 0034993 | Disposable SpO2 Sensor - Adult |
| 866300 | Tracking13 | 0034993 | Disposable SpO2 Sensor - Adult |
| 866301 | Tracking14 | 0034993 | Disposable SpO2 Sensor - Adult |
| 880397 | Tracking3 | 3210070 | Silicone Face Mask, Size 0 |
| 880423 | Tracking29 | 3210070 | Silicone Face Mask, Size 0 |
| 880424 | Tracking30 | 3210070 | Silicone Face Mask, Size 0 |
| 880425 | 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 Return Location ID34132

Stock Reference: 4430000

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.

#73437 Mark as read, no further action at this time

Request Scanning Item To Sale Or Return : Issue Visable to: Katie Evans AND Catherine Spence

VIAMED Stock Meeting Sale or Returns

73437 - Created: 22 Jun 2016 01:22:34 PM By Katie Evans

Set to User: Catherine Spence

Stock Reference: 0012101

Added by Katie Evans sent to Catherine Spence

Please scan to Sale or Returns Location ID34132 Stock Reference: 0012101

22 Jun 2016 Catherine Spence
id 959730.

New Notes

save draft

.....

Priority

Subject

Request Scanning Item to Sale or return

Hide Issue Until :

Meeting VIAMED Stock Meeting Sale or Returns

Create

Link to Issue #

Attach

Complete ISSUE

Urgent

Next Action

5

Confirm I have updated the Issue - users will be alerted to the update

Related Issue

Add File To Issue 73437

Issue Finished - CLOSED - Noone will see additional notes unless viewed in history

Only change Next action if moving the Issue to a new user and not replying to Katie Evans

Catherine Spence

Changing this Field means Catherine Spence may not see updates to Issue

Combined Issues Notes (Comment order might be out of context - Read Original Issue to be sure)

| Issue | Date | User | Action / Notes |
|-------|----------------------|------------------|--|
| 73437 | 22/06/16 01:22:34 PM | Katie Evans | Added by Katie Evans sent to Catherine Spence |
| 73437 | 22/06/16 03:41:20 PM | 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 03:41:29 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.

| 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 Preperation | | | | | |
| SOR | Account | Created | Name | Add | Shipping Notes |
| SOR628 | 00002360 | 01/Dec/2014 | Airedale General Hospital | | EXPORT |
| SOR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital | | EXPORT |
| SOR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital | | EXPORT |
| SOR705 | 00007995 | 30/Mar/2016 | Cortessis Medical (Euro) | | EXPORT |
| SOR736 | 00001900 | 17/Jun/2016 | Gloucestershire Royal Hospital | | EXPORT |
| SOR729 | 00007327 | 22/Jun/2016 | GM Medical A/S | | EXPORT |
| SOR717 | 00007374 | 03/May/2016 | Medivent Ltd (Euro) | | EXPORT |

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

OPERA for Windows

File Edit

ESC CancelF1 HelpF9 Accept

FindPreviousNextAddEditViewMemoQuoteProformaOrderDeliveryInvoiceCreditQuit

Account00007327GM Medical A/SBlokken 113460 BirkerodDenmark

DeliveryGM Medical A/SBlokken 11DK-3460 BirkerodDenmark

Cust RefSOR729MemN

Doc22/06/16

Document** AUTO **22/06/16

Quote** AUTO **/ /

Priority3

W/HouseMAINMain WarehouseModelN

Raised ByKATIE

CommentsHenrik Nielson - +45 4557 0881Goods already supplied on SOR729

AnalysisCurrencyDiscount

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.

OPERA for Windows

File Edit

ESC CancelF1 HelpF4 Del/UndelF5 AddF6 EditF7 InsertF9 AcceptF11 ViewF12 Memo

Brazil

Reference1410000W/HMAINDescriptionFoetal Heart Simulator, model U1000.Quantity1

AnalysisSP0VAT code1

Sell.595.00Line Disc0.00Ext.595.00

Cost.295.00Margn.50.42%Prof.300.00

Due08/11/16Priority3P/O

In Stock6P.Orders0

Details

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

00000550Royal Blackburn HospitalQuote total ex VAT605.00

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

OPERA for Windows

Edit Text

ESC Cancel F1 Help Ctrl+F4 Diary F9 Accept Alt+E Edit Ctrl+D Date

BRAZIL

| Reference | W/H | Description | Quantity |
|-----------|------|--------------------------------------|----------|
| 1410000 | MAIN | Foetal Heart Simulator, model U1000. | 1 |

Analysis SPO VAT code 1 Sell. 595.00 Line Disc 0.00 Ext. 595.00

In Stock

Details

Des

Foetal Heart
Courier deliv

00000550 Rev

Transaction Notepad

S/N: PR02194A10

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".

OPERA for Windows

Edit

ESC Cancel F1 Help Ctrl+F4 Diary F9 Accept Alt+E Edit Ctrl+D Date

BRAZIL

| Reference | W/H | Description | Quantity |
|-----------|------|--------------------------------------|----------|
| 1410000 | MAIN | Foetal Heart Simulator, model U1000. | 1 |

Analysis SPO VAT code 1 Sell. 595.00 Line Disc 0.00 Ext. 595.00

In Stock

Details

Des

Foetal Heart
Courier deliv

00000550 Rev

Transaction Notepad

S/N: PR02194A10

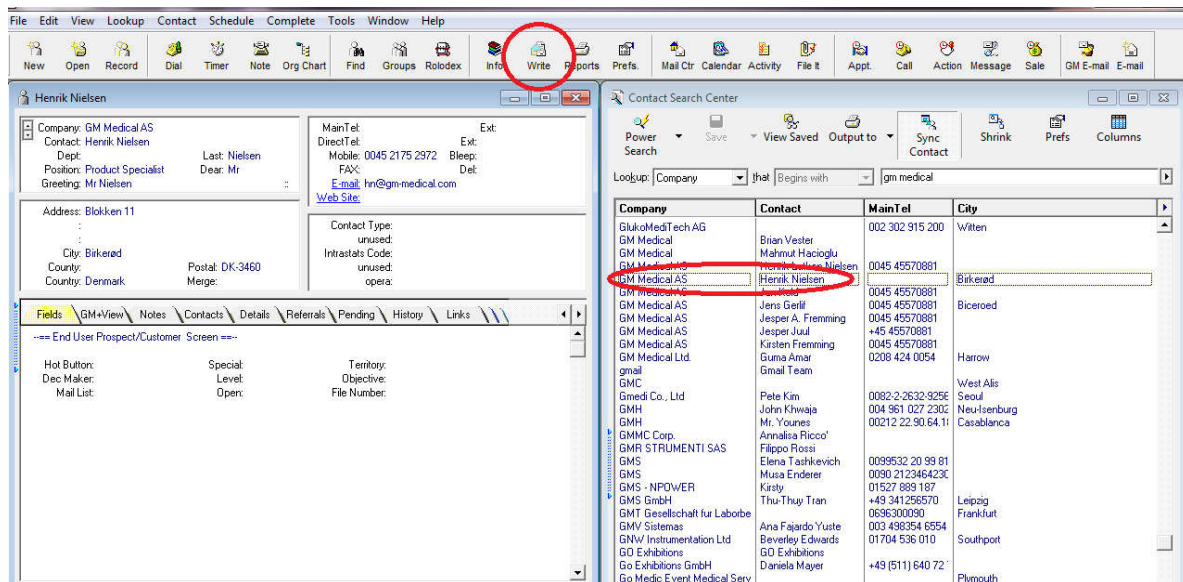
Confirm

Save Changes ?

No Yes

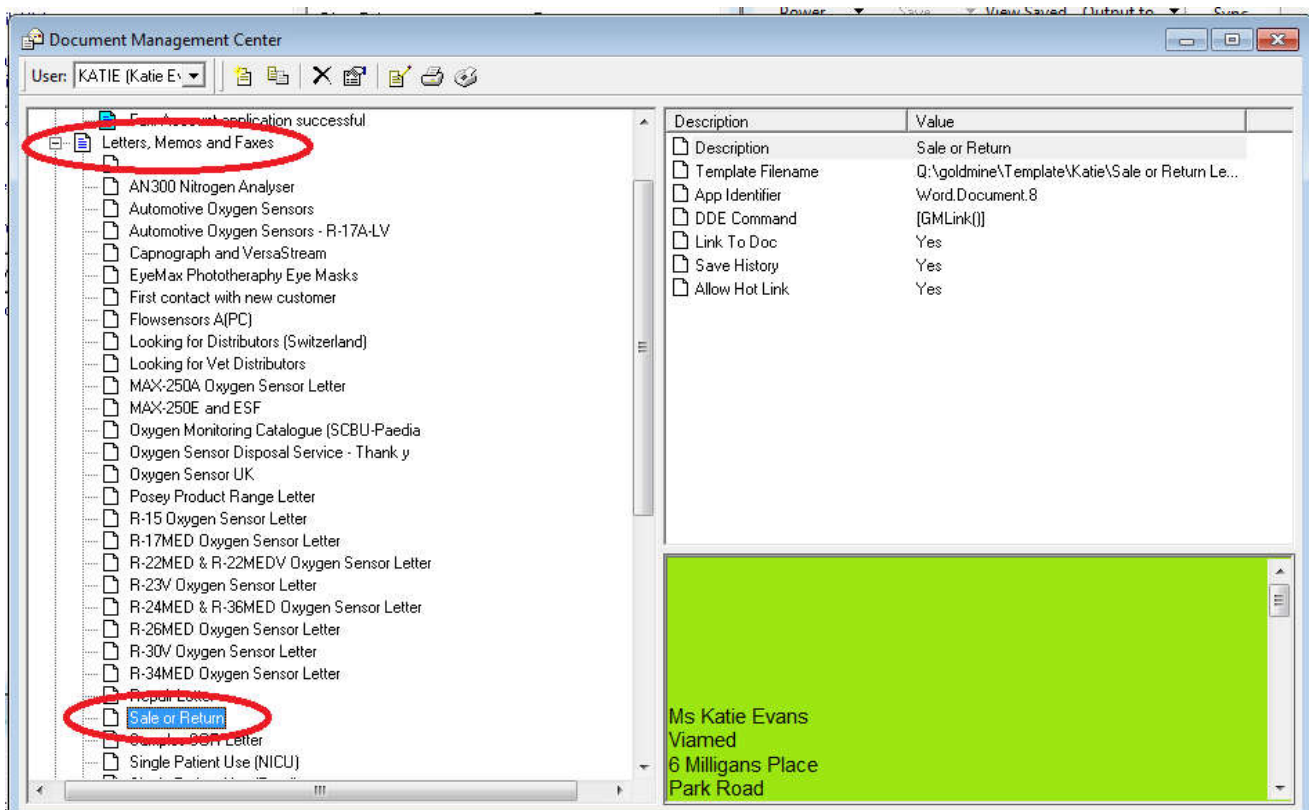
20. Print 2 copies of the quote. 1 is to be sent to the customer, and the other needs to be filed with the SOR paperwork.

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



22. Ensure the user is set to your name

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



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

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

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.

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
 OK-3460 Birkerød
 Denmark
 Postcode:
 Telephone: +45 45570881
 Facsimile: +45 45570650
 Accts Contact:
 Order Contact:
 Ledger A/c: I0007327 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

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

Intrastats

Couriers
 3D Box Packing
 Import Tracking Numbers
 Royal Mail International services
 UPS Shipping Calculations
 UPS Zones

HM Stock
 Stock Descriptions
 Stock Prices

Print Barcodes
 WYA Used Stock

Quality Control
 QA QA Report
 QA QA Stock

Stock Returns
 Sale or Returns

Stock Analysis
 Pricing Checks

Stock Take Tools
 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 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 |  | EXPORT   |  |
| SOR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital |  | EXPORT   |  |
| SOR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital |  | EXPORT   |  |
| SOR705 | 00007995 | 30/Mar/2016 | Cortessis Medical (Euro) |  | EXPORT   |  |
| SOR728 | 00001900 | 17/Jun/2016 | Gloucestershire Royal Hospital |  | EXPORT   |  |
| SOR729 | 00007327 | 22/Jun/2016 | GM Medical A/S |  | EXPORT   |  |
| SOR717 | 00007374 | 03/May/2016 | Medivent Ltd (Euro) |  | EXPORT   |  |

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

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 (ID708186)

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 MD3000C52 Yellow 154902500981 (ID924098)

0012101 Pulse Oximeter VM 2101 90800125 (ID959730)

4330002 SpiroTrue A(PC) Tracking3 (ID978161)

4330002 SpiroTrue A(PC) Tracking4 (ID978162)

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: Henrik Nielsen

Department:

Address: Topstykket 7

Birkerød

Denmark

PostCode: 3460

Update

0012101 Pulse Oximeter VM 2101 90800125 (ID959730) Barcode

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)

Loan 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: \$5

Update

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

Disposable SpO2 Sensor - Adult. Purpose of Device

free of charge sample for evaluation The trial/testing to be undertaken by the authority (if any)

Loan Submit

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 | Remove Print Delivery Note (Today date) 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 utton CR datta Road | | EXPORT | |
| SOR628 | 00002360 | 01/Dec/2014 | Airedale General Hospital | | EXPORT | |
| SOR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital | | EXPORT | |
| SOR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital | | EXPORT | |
| SOR705 | 00007995 | 30/Mar/2016 | Cortessis Medical (Euro) | | EXPORT | |
| SOR728 | 00001900 | 17/Jun/2016 | Gloucestershire Royal Hospital | | EXPORT | |
| SOR729 | 00007327 | 22/Jun/2016 | GM Medical A/S | | EXPORT | |
| SOR717 | 00007374 | 03/May/2016 | Medivent Ltd (Euro) | | EXPORT | |

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
Birkerød
Denmark

3460

Date: 23 Jun 2016
Invoice:# SOR00729

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

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

| Part Number | Viamed Part Number | Description | Quantity | Value |
|--------------------------|--------------------|------------------------------|----------|--------|
| 0012101 | 0012101 | Finger Pulse Oximeter Vi ... | 1 | \$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

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’

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 | | | |
| 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

Search inside document text if possible

Viamed Product Trial Feedback Form

Company ISO Manual Files Index

| Document ID | Type | Description | More | Useage | Added | Expires |
|-------------|-------------------------|------------------------------------|------|----------------------------------|-------------|---------|
| 16508 | Miscellaneous Documents | Viamed Product Trial Feedback Form | | 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.

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.

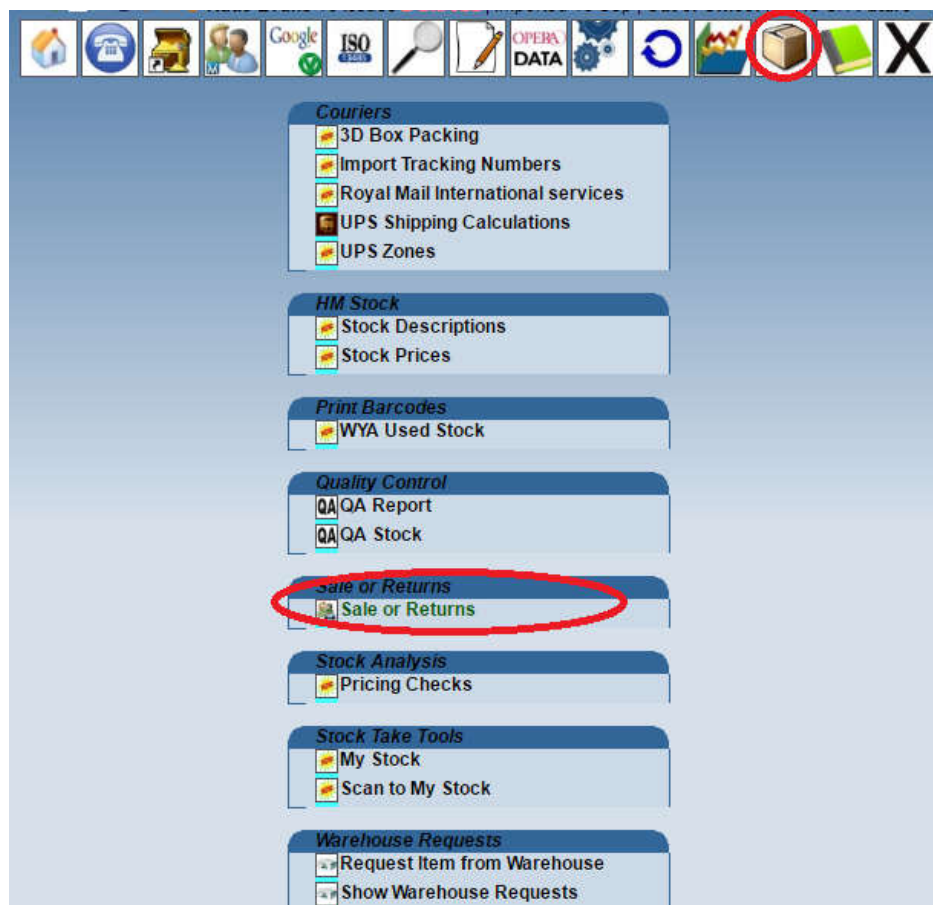
After Checking

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' .

The screenshot shows a software interface with a top navigation bar containing various icons. Below the icons is a header section with the text "Add a New Sale / Return Completed Sale / Returns" and a button labeled "analyse_sale_return" which is circled in red. Below this header, there is a section titled "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". Below this is a section titled "Sale Returns Not Sent / In Preparation" which contains a table with columns: SOR, Account, Created, Name, Add, Shipping Notes, and Send. The table lists several sales returns with their respective details.

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











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.

The screenshot shows a software interface with a top navigation bar containing various icons. Below the icons is a search bar with a "Submit" button. Below the search bar is a table with columns: SOR, Name, Account, Created, Name, Date, Show Delivery Note, Name, and Date. The table lists several sales returns with their respective details. A red box highlights the "I've chased this up" button in the last column of the table.

| SOR | Name | Account | Created | Name | Date | Show Delivery Note | Name | Date |
|--------|---------------------|----------|----------|--|----------|--------------------|---------------------|--------------|
| SOR753 | Crystal Durrow | 00001430 | 16/09/16 | Dorset County Hospital | 16/09/16 | Show Delivery Note | I've chased this up | |
| SOR752 | Sam Jones | 00002020 | 15/09/16 | Royal Surrey County Hospital | 15/09/16 | Show Delivery Note | I've chased this up | |
| SOR751 | Cathy Lowes | 00005430 | 15/09/16 | New Cross Hospital | 15/09/16 | Show Delivery Note | I've chased this up | |
| SOR750 | Michelle McQuillin | 00004470 | 15/09/16 | Salisbury District Hospital | 15/09/16 | Show Delivery Note | I've chased this up | |
| SOR749 | AO: Janine Campbell | 00004735 | 15/09/16 | Southampton General Hospital | 15/09/16 | Show Delivery Note | I've chased this up | |
| SOR748 | Jo Rhyon Curtin | 10012969 | 13/09/16 | Emergency Medical and Retrieval Transfer Service | 13/09/16 | Show Delivery Note | I've chased this up | |
| SOR747 | Mark Elliott | 00005130 | 05/09/16 | Torbay Hospital | 05/09/16 | Show Delivery Note | I've chased this up | |
| SOR746 | Foldan Cruz | 00007885 | 05/09/16 | Jamjoom Medical Industries | 05/09/16 | Show Delivery Note | I've chased this up | |
| SOR745 | Ahani Suliman | 00000550 | 24/08/16 | Royal Blackburn Hospital | 24/08/16 | Show Delivery Note | I've chased this up | |
| SOR743 | Loya Ward | 00002824 | 09/08/16 | Chelsea Westminster Hospital | 09/08/16 | Show Delivery Note | 02 Sep 2016 | Katie Evans |
| SOR742 | Michael Baumann | 00007515 | 09/08/16 | Merivaara AB | 09/08/16 | Show Delivery Note | 02 Sep 2016 | Katie Evans |
| SOR741 | Helen Clark | 00001900 | 08/08/16 | Gloucestershire Royal Hospital | 08/08/16 | Show Delivery Note | 01 Sep 2016 | Emily Hanson |
| SOR739 | Silvia Nedeia | 00006304 | 27/07/16 | Artisana Medical | 27/07/16 | Show Delivery Note | 01 Sep 2016 | Emily Hanson |
| SOR737 | Tommy Muirhead | 00003560 | 13/07/16 | Manchester Royal Infirmary | 13/07/16 | Show Delivery Note | 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.

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

SOR Purchase

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

OPERA for Windows

File Edit

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

Find Previous Next

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

Customer GM Medical A/S

| Memo | Document | Doc Date | Type | Number | Date | Cust Ref. | Status |
|------|----------|----------|-------|----------|----------|-----------|---------|
| Memo | DOC97323 | 22/06/16 | Quote | QU004278 | 22/06/16 | SOR729 | Printed |

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 Cancel F1 Help F9 Accept

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

Account 00007327

GM Medical A/S

Blokken 11

3460 Birkerod

Denmark

Delivery

GM Medical A/S

Blokken 11

DK-3460 Birkerod

Denmark

Cust Ref SOR729 * See Memo *

Due 22/06/16

Document DOC97323 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

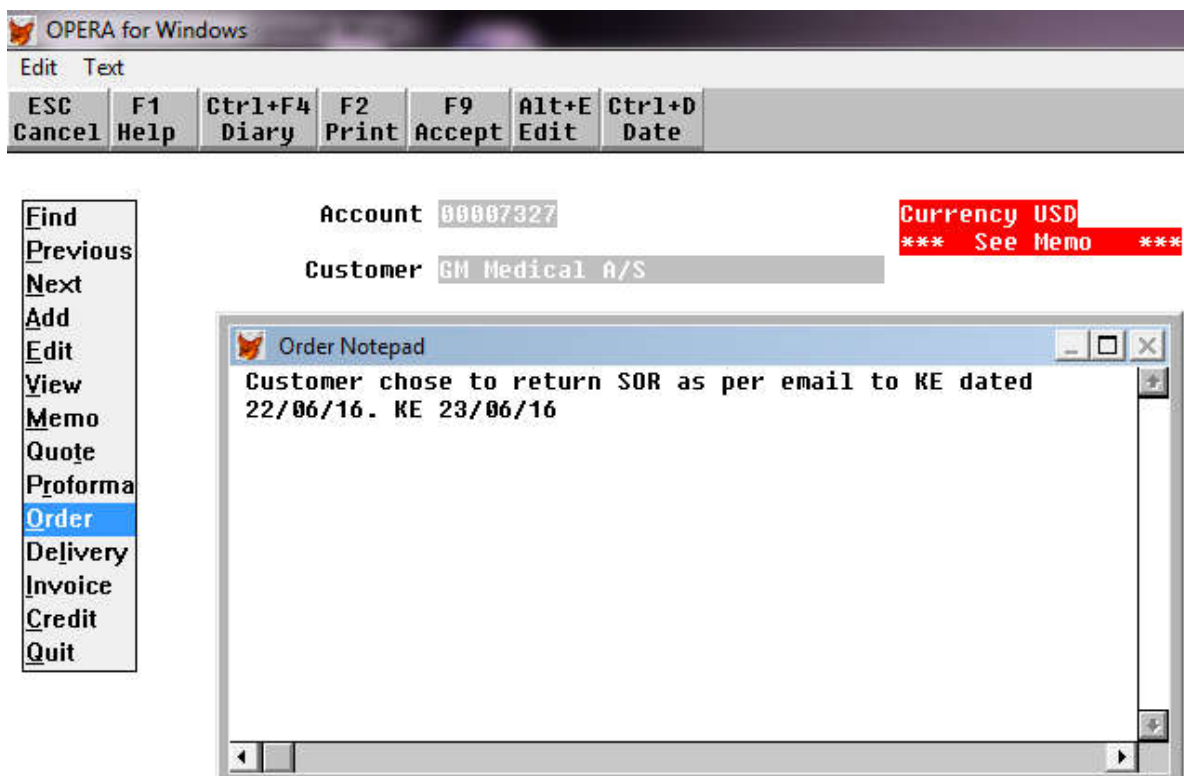
Analysis Currency Discount

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.

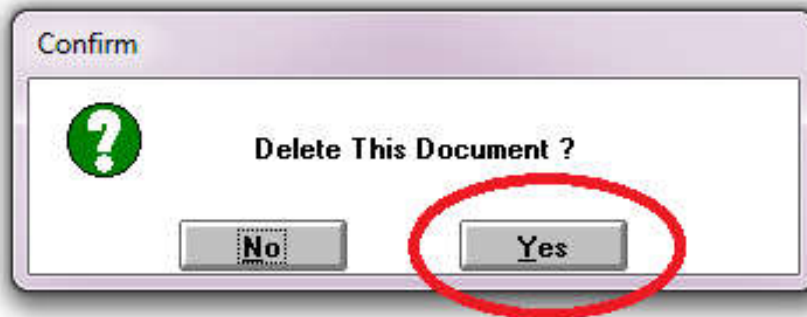
Note: If the customer chooses to add any additional items to the order, hand-write a note on both copies of the ORD to state which items need shipping and which only need to be invoiced. E.g. "1 x 0012160 and 1 x 0014750 already supplied on SOR***, please ship other items".

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.