

## VM3COP20.13 - Sending SOR's

### Checklist

- Director authorisation uploaded to linked issue
- SOR Terms and Conditions signed by customer
- SOR number
- Items been scanned to SOR
- Quotation
- Signed MIA Delivery Note/shipping invoice
- Second copy of first page of MIA Delivery Note/shipping invoice
- Feedback form
- Cover letter on letterhead
- Relevant leaflet and price list
- Relevant business card
- Schedule an issue for follow-up

### Paperwork Checklist

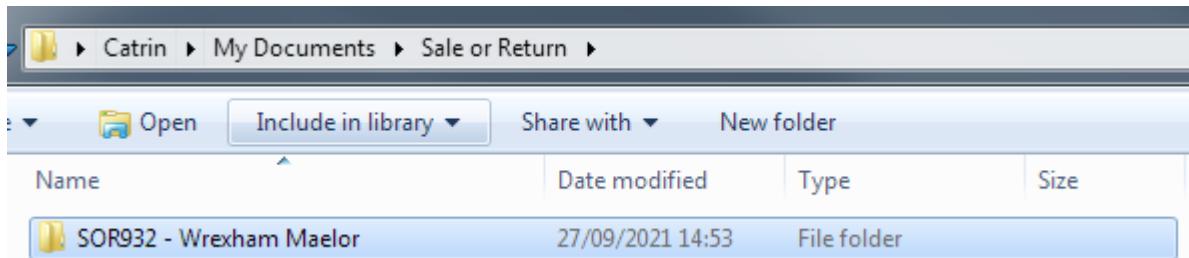
To attach to issue	To Ship
Copy of MIA Delivery Note / shipping invoice	Signed MIA Delivery Note / shipping invoice
Customer SOR request paperwork	Cover letter
Quotation	Viamed product feedback form
Signed Terms & Conditions	Price list
Director authorisation	Leaflet
Cover letter	Quotation
Viamed product feedback form	Relevant business card
Price list	



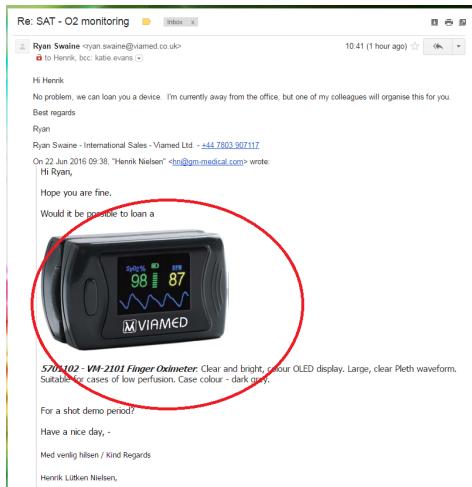
## VM3COP20.13 Sending Sale or Return Orders

### Beginning the Process

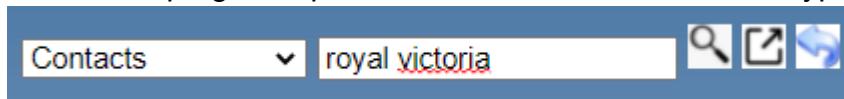
1. If not already created, create a “Sale or Return” Folder in your documents folder.
2. Create a sub folder in your “Sale or Return” Folder your documents folder called “Sale or Return \*Hospital Name\* SOR\*\*\*”.



3. Print the Sale or Return request to PDF, if requested by email, and save in the above folder. If the request was verbal/telephone, please add a telephone order as per VM3COP27.29 and print to PDF.



4. From the top right dropdown menu, click ‘Contacts’ and type your query in the search box.



To search, click the magnifying to search in the same tab or the box with an arrow to open in a new tab.

5. Click the correct account

(Please be aware any accounts which are highlighted in green have been used in the new ordering system i.e. since January 2020)

The screenshot shows a search interface for a CRM system. The search bar at the top contains the text 'royal victoria'. Below the search bar, a message says 'Search' and 'Add New Company / Hospital \*\*'. A 'KEY' section is present with three items: 'Recent Customer Account' (blue), 'Recent Supplier Account' (orange), and 'Recent Supplier and Customer Account' (green). A 'General Contact / Old Opera Account' link is also shown. The main area is titled 'Hospital / Organisation Names' and lists three results:

		Contacts #	Organisation Name	Address	Postcode	Phone	Category	Credit	Credit Cr	Extra Search	
<input type="checkbox"/>		CID940 / 00003800	Contacts #39	Newcastle Hospitals NHS	Gosforth	NE3 3HD	0191 233 6161	NHS Hospital End User	Credit	Credit Cr	Extra Search
<input type="checkbox"/>		CID15600 / 00003785	Contacts #20	Royal Victoria Infirmary Hospital	Newcastle Upon Tyne	NE1 4LP	0191 283 9794	NHS Hospital End User	Credit		Extra Search
<input type="checkbox"/>		CID2011 / --	Contacts #	Royal Victoria Day Hospital	Dundee	DD2 1SP	0138 242 3000	Customer			

- Gain authorization from a director and upload against the customers contact record in the CRM. This can be a PDF of an email, PDF of an issue or screenshot of a Skype conversation (VM3COP27.46 Using the Snipping Tool in Windows 10). Save to the relevant folder created in step 2.

Click the 'Upload Document' button  


Choose file

File Description: Sale or Return Authorisation

File Type: Sale or Return Document

Security: Internal Use Only

Click 'Upload File'

### Sending Request for Signed Terms and Conditions

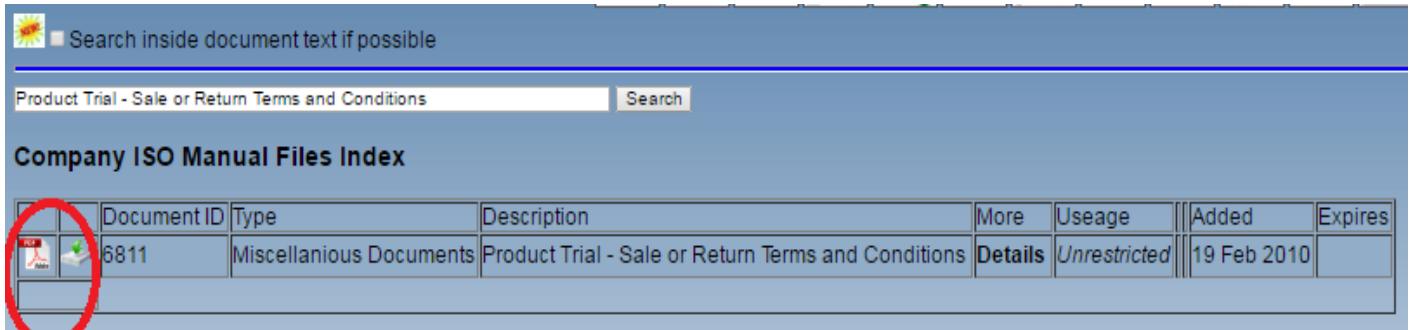
- Locate the Sale or Return page.

The screenshot shows a web page with a blue header bar containing the text 'Sale or Returns'. Below the header, there is a button labeled 'Sale or Returns' with a small icon to its left. To the right of the button are two small icons: a star and a person. To the left of the main content area, there is a small image of a cardboard box.

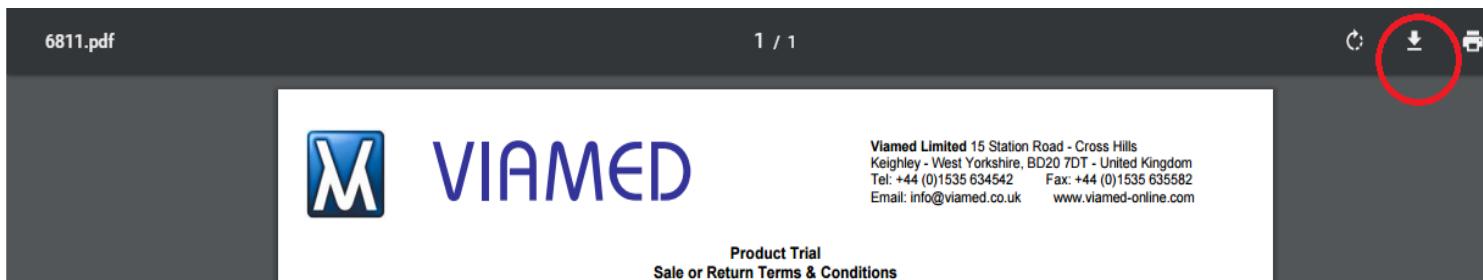
- Click 'Product Trial – Sale or Return Terms and Conditions'

The screenshot shows a web page with a blue header bar containing the text 'Add a New Sale / Return Completed Sale / Returns analyse\_sale\_return'. Below the header, there is a red circle drawn around a blue link text that reads 'Product Trial - Sale or Return Terms and Conditions'. The link is located on a blue background bar.

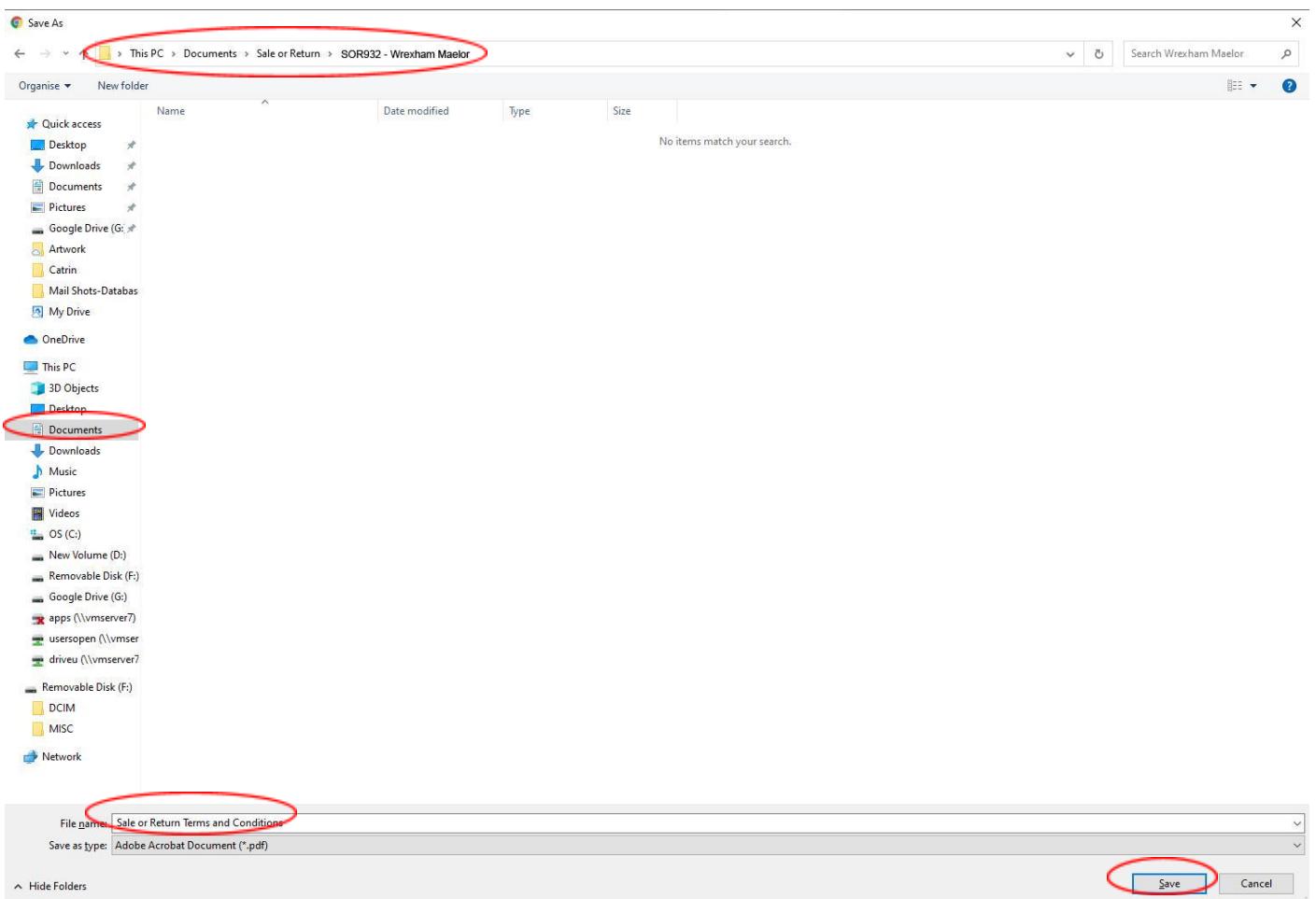
- Click the PDF icon to open the file and download from there (see the following steps) or click the green arrow icon which will download the file to your Downloads folder and move this to your designated folder created in step 2.



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



10. When the Save window opens, click 'Documents', and locate your newly created folder, as per step 2. Change the document 'File name' to: 'Sale or Return Terms and Conditions' and click 'Save'.



11. Return to the request email, attach the Sale or Return Terms and Conditions from the saved location and reply to the customer using the template email (VM3COP27.47) and click 'Send'.

## Once terms and conditions received - Create a new SOR

12. In the contact management, find the correct account and click on the SOR icon to the left of the required contact name

Sales Order	Purchase Order	Contact Actions										Department	Position	Direct Phone	Email	Head of	
<input type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>			 <b>SOB</b>								No Name			0191 282 4069	alan.edwards6@nhs.net	<input checked="" type="checkbox"/> 
<input checked="" type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>			 <b>SOB</b>								A Edwards			0191 282 4069	alan.edwards6@nhs.net	<input type="checkbox"/>
<input type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>			 <b>SOB</b>								Accounts Payable				nuth.financialaccountspayableteamc@nhs.net	<input type="checkbox"/> 
<input checked="" type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>			 <b>SOB</b>								Annamaria De Sousa			0191 282 4069	annamaria.de-sousa@nhs.net	<input type="checkbox"/>

13. Click, 'Add New Sale/Return'



This will redirect you to the main sale/return page and create a new record for the company/hospital contact.



## Requesting Stock Movement

14. When the **terms and conditions have been received** return to Intrastats and click on the stock box icon. From this page, click on 'Sale or Returns'



15. 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 Sell, 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	

16. Fill in the issue detailing the part number(s), description and quantity required. Include the SOR number and Hospital/Company the goods are going to, for reference.  
 Send this issue to the person in Goods Out, fill in the CID / account number and click 'Add Issue'.

**VIAMED Stock Meeting - Sale or Returns**

<b>Subject</b>	
Request Scanning Item to Sale or return SOR123	
Please scan to Sale or Returns Location ID34132 Stock Reference:	
0012165 VM-2160 SMARTsat x 1 0014752 Adult Silicone SpO2 Sensor x 1	
SOR123 Wrexham Maelor	
Issue To: <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="button" value="Catherine Spence"/> My Filters <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="button"/> Related to Issue <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="button"/> Stock Ref: <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="text" value="0012165"/> PO Ref: <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="text"/> Opera A/c: <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="text" value="0000002"/> Mark as Important <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="checkbox"/> Mark as Read only <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 5px;" type="checkbox"/> <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="button" value="Add Issue"/>	

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

## 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 a 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 Visible 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 <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;">22 Jun 2016 Catherine Spence id 959730.</div> <table border="1"> <tr> <td style="width: 30%;">           Subject            Hide Issue Until :            Meeting VIAMED Stock Meeting Sale or Returns            Create            Link to Issue # <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="73437"/>            Attach            Complete ISSUE            Urgent            Only change Next action if moving the Issue to a new user and not replying to Katie Evans            Next Action <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="Catherine Spence"/>            Priority <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="5"/>            Confirm I have updated the Issue - users will be alerted to the update.         </td> <td style="width: 30%;">           Request Scanning Item to Sale or return            Related Issue            Add File To Issue 73437  <input type="checkbox"/> Issue Finished - CLOSED - No one will see additional notes unless viewed in history         </td> </tr> </table> <p>Combined Issues Notes ( Comment order might be out of context - Read Original Issue to be sure)</p> <table border="1"> <tr> <td>Issue</td> <td>Date</td> <td>User</td> <td>Action / Notes</td> </tr> <tr> <td>73437</td> <td>22/06/16 01:22:34 PM</td> <td>Katie Evans</td> <td>Added by Katie Evans sent to Catherine Spence Please scan to Sale or Returns Location ID34132 Stock Reference: 0012101 New Issue</td> </tr> <tr> <td>73437</td> <td>22/06/16 03:41:20 PM</td> <td>Catherine Spence</td> <td>Re-Read</td> </tr> <tr> <td>73437</td> <td>22/06/16 03:41:20 PM</td> <td>Catherine Spence</td> <td>Re-Read</td> </tr> <tr> <td>73437</td> <td>22/06/16 03:41:29 PM</td> <td>Catherine Spence</td> <td>Re-Read</td> </tr> <tr> <td>73437</td> <td>22/06/16 03:41:29 PM</td> <td>Catherine Spence</td> <td>id 959730 Completed</td> </tr> <tr> <td>73437</td> <td>22/06/16 03:41:29 PM</td> <td>Catherine Spence</td> <td>id 959730</td> </tr> <tr> <td>73437</td> <td>23/06/16 05:13:19 PM</td> <td>Katie Evans</td> <td>Re-Read</td> </tr> </table>			Subject Hide Issue Until : Meeting VIAMED Stock Meeting Sale or Returns Create Link to Issue # <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="73437"/> Attach Complete ISSUE Urgent Only change Next action if moving the Issue to a new user and not replying to Katie Evans Next Action <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="Catherine Spence"/> Priority <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="5"/> Confirm I have updated the Issue - users will be alerted to the update.	Request Scanning Item to Sale or return Related Issue Add File To Issue 73437 <input type="checkbox"/> Issue Finished - CLOSED - No one will see additional notes unless viewed in history	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
Subject Hide Issue Until : Meeting VIAMED Stock Meeting Sale or Returns Create Link to Issue # <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="73437"/> Attach Complete ISSUE Urgent Only change Next action if moving the Issue to a new user and not replying to Katie Evans Next Action <input style="width: 150px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="Catherine Spence"/> Priority <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text" value="5"/> Confirm I have updated the Issue - users will be alerted to the update.	Request Scanning Item to Sale or return Related Issue Add File To Issue 73437 <input type="checkbox"/> Issue Finished - CLOSED - No one will see additional notes unless viewed in history																																			
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73437	22/06/16 03:41:29 PM	Catherine Spence	id 959730																																	
73437	23/06/16 05:13:19 PM	Katie Evans	Re-Read																																	

17. In Intrastats, follow the quote procedure VM3COP27.31 to create a quote for the item(s) requested, ensuring any quotes for over £/\$/€10,000 are signed off by a director.

**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		Issue ID	Items	Account	Created	Name	Add	Shipping Notes	Send
SOR844	Zoey Teal	Create	3	00001150	15/Mar/2018	Countess of Chester Hospital			
SOR934	Steve Hardaker	Create	23	00005030	14/Sep/2021	Kings Mill Hospital			
SOR933	Kate Griffiths	# 234303	Cancel SOR	00000668	01/Sep/2021	Nuffield Hospital Hereford			

Use the SOR number as the 'Customer Reference' unless an order number for the quote has been received.

In the notes section state 'Goods already supplied on SOR\*\*\*'

**NOTES**

Order Notes (Does not print on Paperwork)	<p>Add Notes:</p> <div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div> <p>Highlight: <input checked="" type="radio"/> None   <input type="radio"/> Bold   <input type="radio"/> Bold / Red</p> <p style="background-color: #008000; color: white; padding: 2px 5px; margin-top: 5px;">Add New Notes Can be added at any time</p>
--	--

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

18. Click in the memo box next to the product number/description.

Stock Reference	Description
2810011	<p>MD300-C2 Finger Pulse Oximeter.</p> <p>Memo:</p> <div style="border: 1px solid #ccc; height: 40px; margin-top: 10px;"></div>

19. Type the serial number(s) in the format 'S/N: ???'.

There may be additional notes here, if so, add the serial number beneath them.

20. Once all details have been entered, click 'Print QVM\*\*\*\*\* checking document' and check details are aligned and correct.

21. Once all completed, go back to the main processing back and click 'Submit QVM\*\*\*\*\* for checking'

22. Add message to the 'Office Order Checking' Skype group or 'Viamed Employees' (if you are not included in the main checking group) and ask for your quote to be checked.

## Writing Sale or Return Letter

23. Open the Sale or Return letter from the top of the sale or return screen, amend all the details as indicated in the example below, to include the product description, part numbers, SOR number and serial number.

SOR Procedures	
Doc Id	Document
29959	VM3COP20.13 Sending SOR Sale or Return Items to Customers
16434	VM3COP20.131 Template Letter Sending SOR Samples to Customers
14223	VM3COP20.132 Template Letter Sending SOR Sale or Returns to Customers
27446	VM3COP20.133 Sending Samples SOR

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  
Birkeroed, 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.

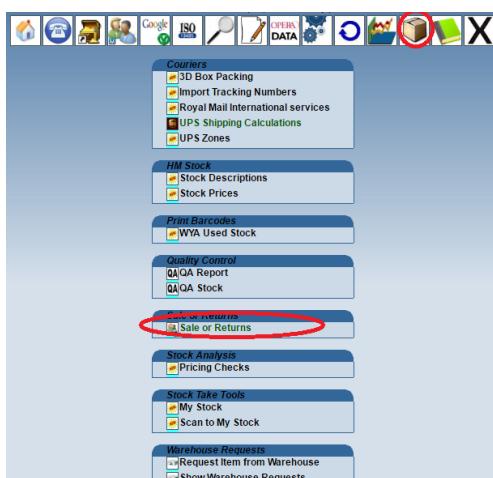
Yours sincerely

24. When complete, print the letter to PDF and save on your designated folder, created in step 2 in documents, with the following format:

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

## Adding Stock to SOR

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



26. 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	Issue ID	Items	Account	Created	Name	Add
SOR844	Zoey Teal	Create	3	00001150	15/Mar/2018	Countess of Chester Hospital
SOR934	Steve Hardaker	Create	23	00005030	14/Sep/2021	Kings Mill Hospital
SOR933	Kate Griffiths	# 234303	Cancel SOR	00000668	01/Sep/2021	Nuffield Hospital Hereford

27. 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	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 Tracking42 (ID580424) 3210070 Silicone Face Mask, Size 0 Tracking31 (ID580425) 0014835 Pulse Oximetry Wrap Sensor EDL03489 (ID708188) 0014750 SpO2 Silicone Sensor- Adult EDM03972 (ID711777) 0012160 Pulse Oximeter VM 2160 T81000185 (ID942231) 0034993 Disposable SpO2 Sensor- Adult Tracking1 (ID8865289) 0034993 Disposable SpO2 Sensor- Adult Tracking11 (ID8865287) 0034993 Disposable SpO2 Sensor- Adult Tracking11 (ID8865288) 0034993 Disposable SpO2 Sensor- Adult Tracking12 (ID8865299) 0034993 Disposable SpO2 Sensor- Adult Tracking13 (ID8865300) 0034993 Disposable SpO2 Sensor- Adult Tracking14 (ID8865301) 2810008 MD300C62 Yellow 154002500081 (ID9240285) <b>0012101 Pulse Oximeter VM 2101 90800125 (ID959730)</b> 4330002 SpiroTrue AIPCO Trackings (ID761017) 4330002 SpiroTrue AIPCO Tracking4 (ID76102)	

28. 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.

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

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

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

Company	GM Medical A/S
Contact	Henrik Nielsen
Department	
Address	Topstykket 7 Birkeroed Denmark
PostCode	3460
Update	
Barcode 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 <input type="radio"/> Submit	

Current Items on sale Return id #729  
[Print Print Picking List](#)  
[Stock Ref](#) [Serial number](#) [Barcode](#) [Description](#) [Type](#)

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

31. Should the items be disposable, select 'Giving' from the dropdown menu.
32. Repeat for all items required.
33. 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
<input type="button" value="Update"/>	

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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)
<input type="button" value="Loan"/> <input type="button" value="Submit"/>	

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Current Items on sale Return id #742

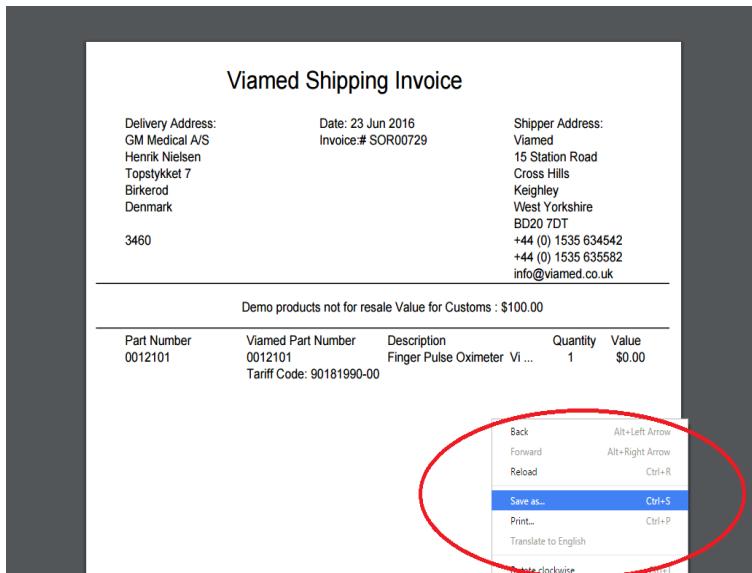
Stock Ref	Serial number	Barcode	Description	Type
0034993	Tracking22	866309	Disposable SpO2 Sensor - Adult.	g

34. Return to the main Sale or Return screen and click the appropriate flag icon for the customer to generate an MIA Delivery Note depending upon the location of the customer (England and Northern Ireland use the same form, Scotland and Wales have their own) or export for non-UK customers.



35. Save the PDF to your designated folder, created in step 2 in documents, in the following format:

Export: 'SOR Shipping Invoice - \*Customer Name\* - SOR\*\*\* - date backwards'  
 UK: 'SOR Delivery Note - \*Customer Name\* - SOR\*\*\* - date backwards'



36. 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		Issue ID	Items	Account	Created	Name	Add	Shipping Notes	Send	
SOR844	Zoey Teal	Create	3	00001150	15/Mar/2018	Countess of Chester Hospital				
SOR934	Steve Hardaker	Create	23	00005030	14/Sep/2021	Kings Mill Hospital				
SOR933	Kate Griffiths	# 234303	Cancel SOR	00000668	01/Sep/2021	Nuffield Hospital Hereford				

37. Click on the PDF icon

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	

38. This will open the feedback form; save the PDF to your designated folder, created in step 2 in documents. Save as "Viamed Product Trial Feedback Form".

### Providing paperwork to Goods Out

When signed terms and conditions have been received back from customer, Goods out have confirmed stock has been scanned to SOR shelf and stock has been linked to the SOR:

39. Collate the following and create issue associated with the SOR and attach to the issue, then send to Goods Out.

SOR	Issue ID
SOR844	Create

- Sale or Return Letter (to be printed onto letterhead by Goods Out)
- MIA Delivery Note (If the SOR is for a UK customer, a director or manager will need to digitally sign page 2 to ensure that ownership of the unit does not pass to the customer. If the goods are disposable and we have stated 'Giving' then by signing it we are passing over ownership to them. Goods out need to print the MIA delivery note/shipping invoice and a second copy of the first page.)
- Viamed Product Trial Feedback Form
- Relevant price list in the correct currency, as found on the customer's account, from the stock page.
- Quotation for goods being sent.
- Request for SOR paperwork
- Signed terms and conditions
- Director authorisation



## Checking an SOR

40. Ensure the items listed on the MIA Delivery Note/shipping invoice match the items requested by the customer.
41. Ensure the paperwork to ship with the items have been attached to issue ID on the sale or return page. All files attached to the linked issue will automatically be linked to the CRM system and show in the 'Document Files' tab in the customers CRM record.

The issue should contain:

MIA Delivery Note note/shipping invoice
Cover letter (to be printed to letterhead by Goods out)
Viamed product feedback form
Price list for products being sent
Quotation for products being sent

Additional paperwork to be added by Goods Out to shipment:

Leaflets for products being sent
Relevant business card

Paperwork also attached to the issue will be file against customer CRM:

Copy of MIA Delivery Note/shipping invoice
Director authorisation uploaded to linked issue
A copy of the quotation for products being sent
Terms & Conditions signed by the customer
Copy of Cover Letter

Once checked and complete, send issue to Goods Out.

## Following up an Evaluation and to Determine the Success of the Sale or Return

42. The sender needs to schedule themselves a follow up issue 2 weeks ahead, to discuss the product with the customer, obtain feedback and determine the progress of the evaluation.

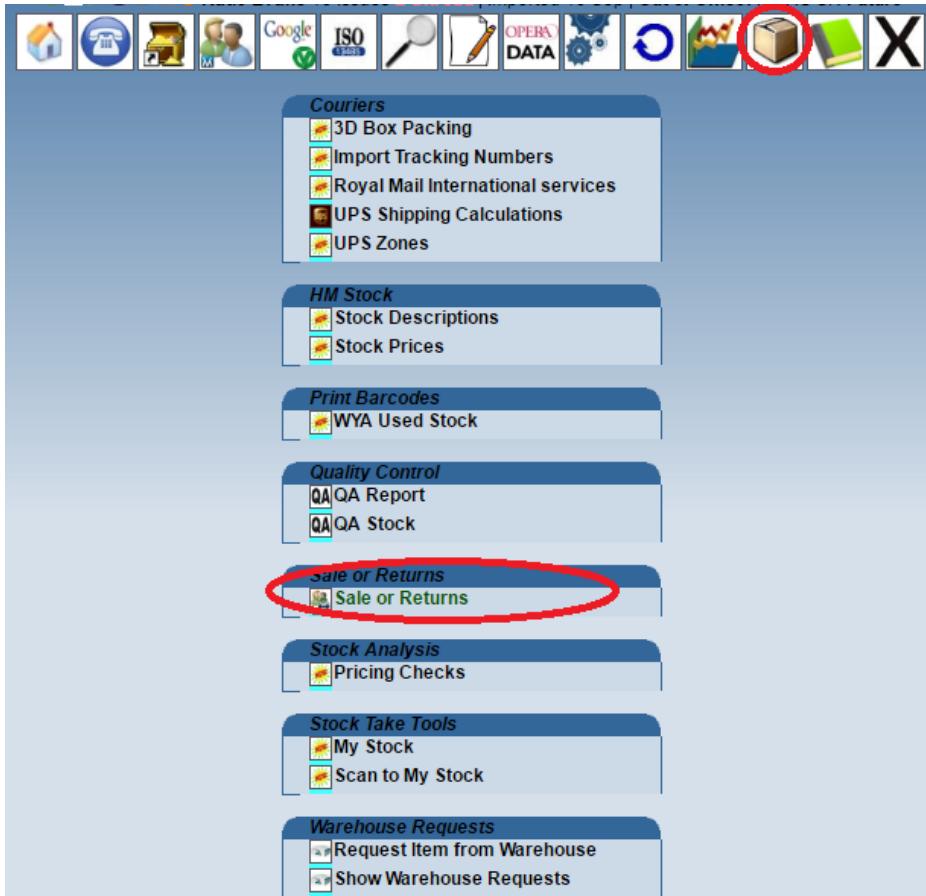
The standard loan time for SOR is 4 weeks.

In the first instance, this follow up should be done via telephone call, with a follow up by email if the contact is not available.

Please aim to close it off and either have the items returned to us within the 4-week period or an official purchase order received for them to purchase.

43. If following up by email, please also direct the customer to the online feedback form: <http://www.viamed.co.uk/trial-feedback> unless a specific product feedback form is available. This will show on the stock memos/FAQs screens.

44. 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'.



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

Add a New Sale / Return Completed Sale / Returns <u>analyse_sale_return</u>									
Please Send with all sale or return goods the <a href="#">Product Trial - Sale or Return Terms and Conditions</a> <a href="#">Claimed Product Trial Feedback Form</a>									
Sale Returns Not Sent / In Preparation									
SOR	Customer	Issue ID	Items	Account	Created	Name	Add	Shipping Notes	Send
SOR844	Zoey Teal	Create	3	00001150	15/Mar/2018	Countess of Chester Hospital			
SOR934	Steve Hardaker	Create	23	00005030	14/Sep/2021	Kings Mill Hospital			
SOR933	Kate Griffiths	# 234303	Cancel SOR	00000668	01/Sep/2021	Nuffield Hospital Hereford			

46. 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.

SOR932	Stephanie Davies	00005500	Wrexham Maelor Hospital	06/08/21	Show Delivery Note	Sophie Lines	I've chased this up
SOR931	Simon Crabbe	00002270	Hull Royal Infirmary	11/06/21	Show Delivery Note	Steve Hardaker	02 Sep 2021 Steve Hardaker
SOR930	FAO Philip Ward	00002500	Leeds General Infirmary	02/06/21	Show Delivery Note	Sarah Walton	05 Jul 2021 Sarah Walton
SOR929	Maria Iglesias	00006673	Proyectos Hospitalarios	06/04/21	Show Delivery Note	Ryan Swaine	I've chased this up

47. Once the initial feedback/evaluation status is requested, the sender should schedule themselves another issue to contact them again in 1 week, should a response have not been received. In the first instance, this follow up should be done via telephone call, speaking with the original contact who requested the SOR or signed the trial paperwork, with a follow up by email if the contact is not available.

48. Repeated attempts should be made to get a decision from the customer.

Should a response still not be received by the expiry date of the trial, contact the customer that requested the Sale or Return along with any other contacts that were involved (e.g. if the initial request came from Theatres but the goods were sent via the EBME Department) using the email template for notifying expiration of the loan period. (VM3COP27.49 Template Email Sale or Return Loan Period Expired).

If no response is received within 5 working days, escalate to the relevant sales manager or a Director.

## Received Feedback

49. When product feedback is received, add an issue as per 'Issues Overview' 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' under the 'Feedback' meeting name, and select either 'Customer Feedback Negative' or 'Customer Feedback Positive' as appropriate.

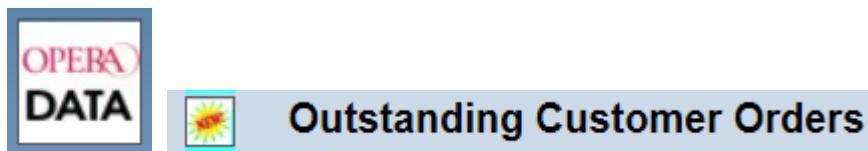
Include SOR reference in the notes for easy reference/searching.

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 need to 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.

50. Once received, locate the quotation on the 'Outstanding Customer Orders' page.



51. Click on the **Details** button against the correct quote line.

52. Click 'Convert to Order' button

**Convert to Order**

Check the delivery address against the PO; it is not always known at the point of quotation but this must match the PO.

53. Amend the 'Customer Reference' box to the purchase order number and change the 'Due' date to the next available shipping day.

54. A note should have been added at the quote stage, in the 'Notes' section 'Goods already supplied on SOR\*\*\*'. Ensure it is still there, if not, add this note.

55. Once checked information against the purchase order, click 'Submit CVM\*\*\*\*\* for checking'

**Note:** If the customer chooses to add any additional items to the order, add notes to the order stating which items need shipping and which only need to be invoiced. Skype or Call Goods out to confirm notes have been added.

E.g. '1 x 0012160 and 1 x 0014750 already supplied on SOR\*\*\*, please ship other items'.

### **SOR Return**

56. 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.

57. When this issue is received, print to PDF. Locate the quote on the outstanding customer orders page.

Open the order for editing

**Order has Error -  
open for editing**

**DELETE Order  
132733**

Then click 'DELETE Order \*\*\*\*\*'

#### Reason for Deletion:

Write a note to say that the customer did not want to purchase the goods and has returned them on SRS\*\*\*\*\*.