

## 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

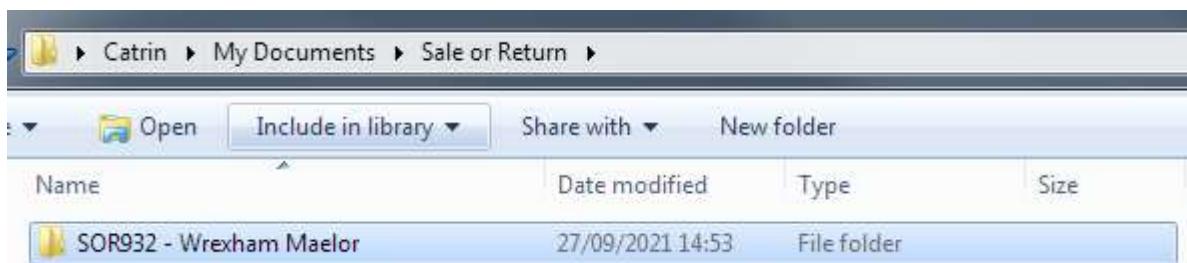
### Paperwork Checklist

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	

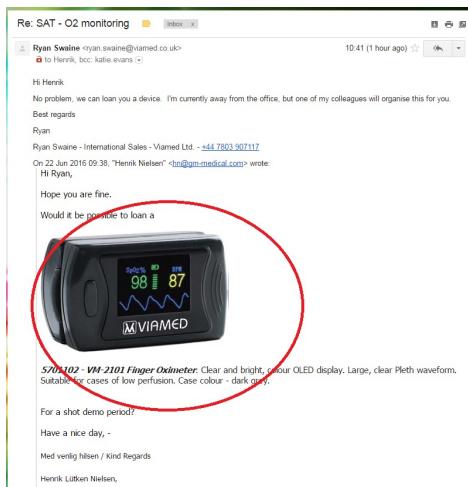
## VM3COP20.13 Sending Sale or Return Orders

### Beginning the Process

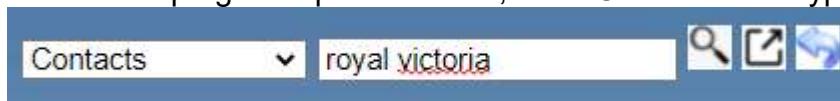
1. If not already created, create a “Sale or Return” Folder in your documents folder.
2. Create a sub folder in your “Sale or Return” Folder your documents folder called “Sale or Return \*Hospital Name\* SOR\*\*\*”.



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.



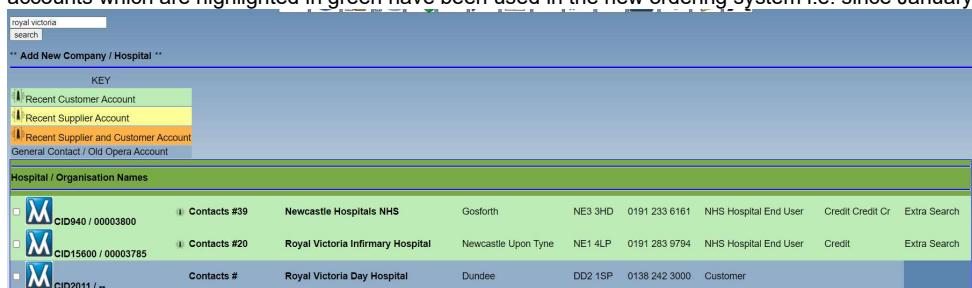
4. From the top right dropdown menu, click ‘Contacts’ and type your query in the search box.



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)



- 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.

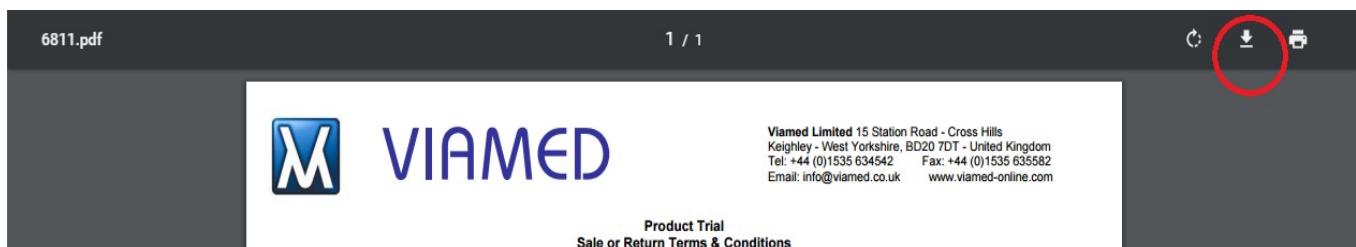


- Click 'Product Trial – Sale or Return Terms and Conditions'

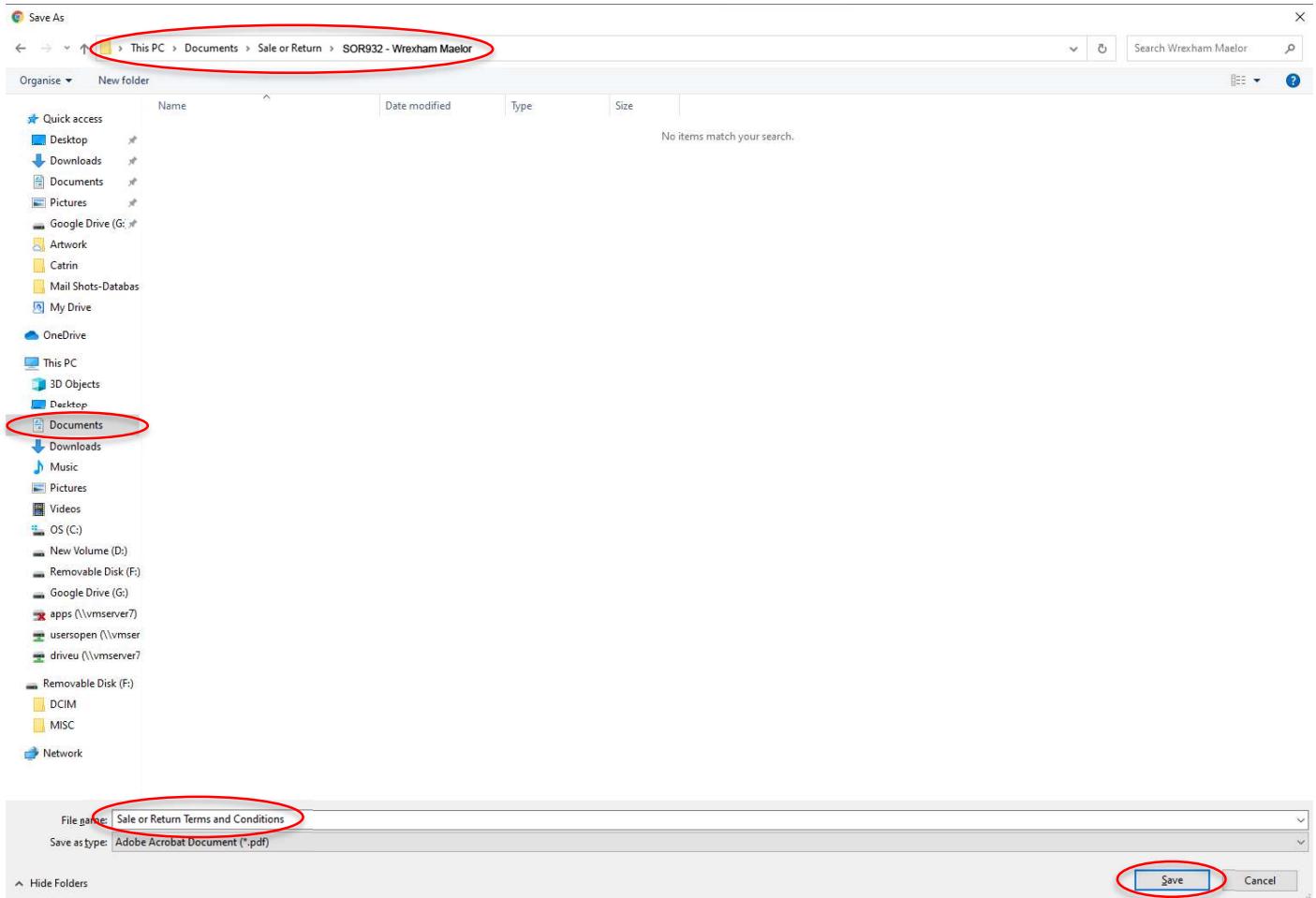


- Click the PDF icon to open the file and download from there (see the following steps) or click the green arrow icon which will download the file to your Downloads folder and move this to your designated folder created in step 2.

Document ID	Type	Description	More	Usage	Added	Expires
6811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	<a href="#">Details</a>	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'.



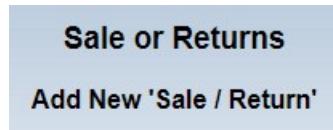
11. Return to the request email, attach the Sale or Return Terms and Conditions from the saved location and reply to the customer using the template email (VM3COP27.47) and click 'Send'.

### 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"/>	         	No Name			newcastle.nhsft@cloud-trade.net	<input type="checkbox"/> 
<input checked="" type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>	         	A Edwards		0191 282 4069	alan.edwards6@nhs.net	
<input type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>	         	Accounts Payable			nuth.financialaccountspayableteamc@nhs.net	
<input checked="" type="checkbox"/>  Viamed Add S.O.	<input type="checkbox"/>	         	Annamaria De Sousa		0191 282 4069	annamaria.de-sousa@nhs.net	

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'



then



15. Scroll to the bottom of the page and click 'Request new stock item to be scanned to Sale or Return'.

Stock currently available and available to being 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**

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**

**Subject**  
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: Catherine Spence

My Filters

Related to Issue

Stock Ref: 0012165

PO Ref:

Opera A/c: 0000002

Mark as Important

Mark as Read only

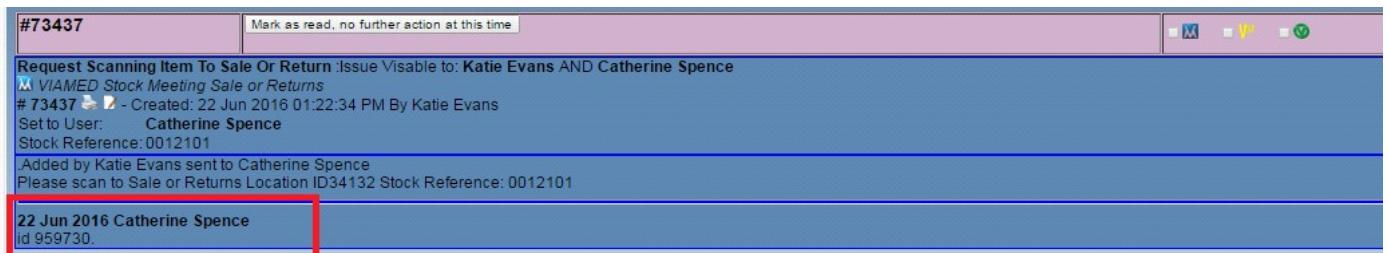
Note: if the item is urgent, also inform Goods Out verbally.

## 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 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.		

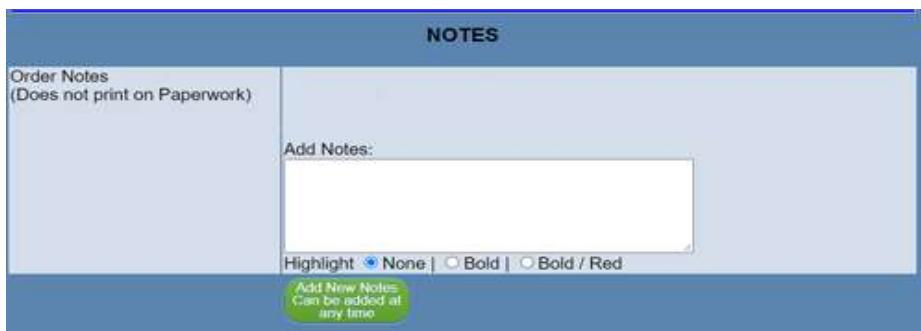
17. In Intrastats, follow the quote procedure VM3COP27.31 to create a quote for the item(s) requested, ensuring any quotes for over £/\$/€10,000 are signed off by a director.



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			
SOR933	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)

Add Notes:

Highlight  None |  Bold |  Bold / Red

Add New Notes  
Can be added at any time

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	MD300-C2 Finger Pulse Oximeter.
Memo:	

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  
Blokkens 11  
Birketø, 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.

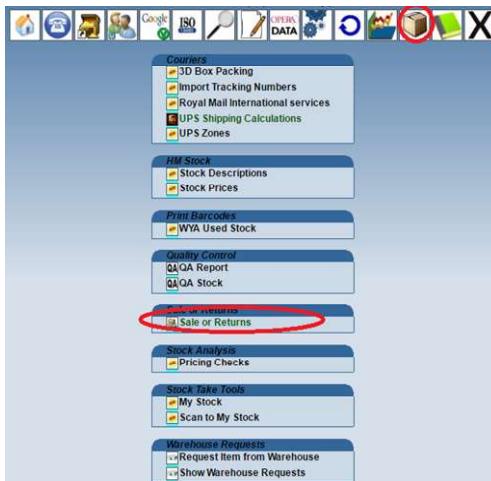
Yours sincerely

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'



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

A screenshot of a web-based application titled 'Add a New Sale / Return Completed Sale / Returns analyse\_sale\_return'. The page includes a header with links for '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'. A table lists items with columns for SOR, Name, Issue ID, Items, Account, Created, Name, Add (with a red circle), Shipping Notes, and Send. The 'Add' column contains icons for adding new items. The table data is as follows:

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

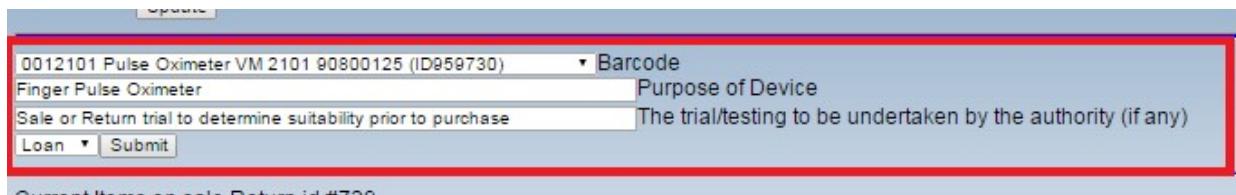
A screenshot of a dropdown menu for selecting an item. The menu lists various items with their IDs and descriptions. The item '0012101 Pulse Oximeter VM 2101 90800125 (ID959730)' is highlighted with a red box. Other items in the list include: 3210070 Silicone Face Mask, Size 0 Tracking3 (ID580397), 3210070 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), 2810006 MD300C52 Yellow 154002500081 (ID924088), 4330002 SpiroTrue A(PC) Tracking3 (ID970101), and 4330002 SpiroTrue A(PC) Tracking4 (ID978162).

27. 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.

28. 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'.

29. 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'



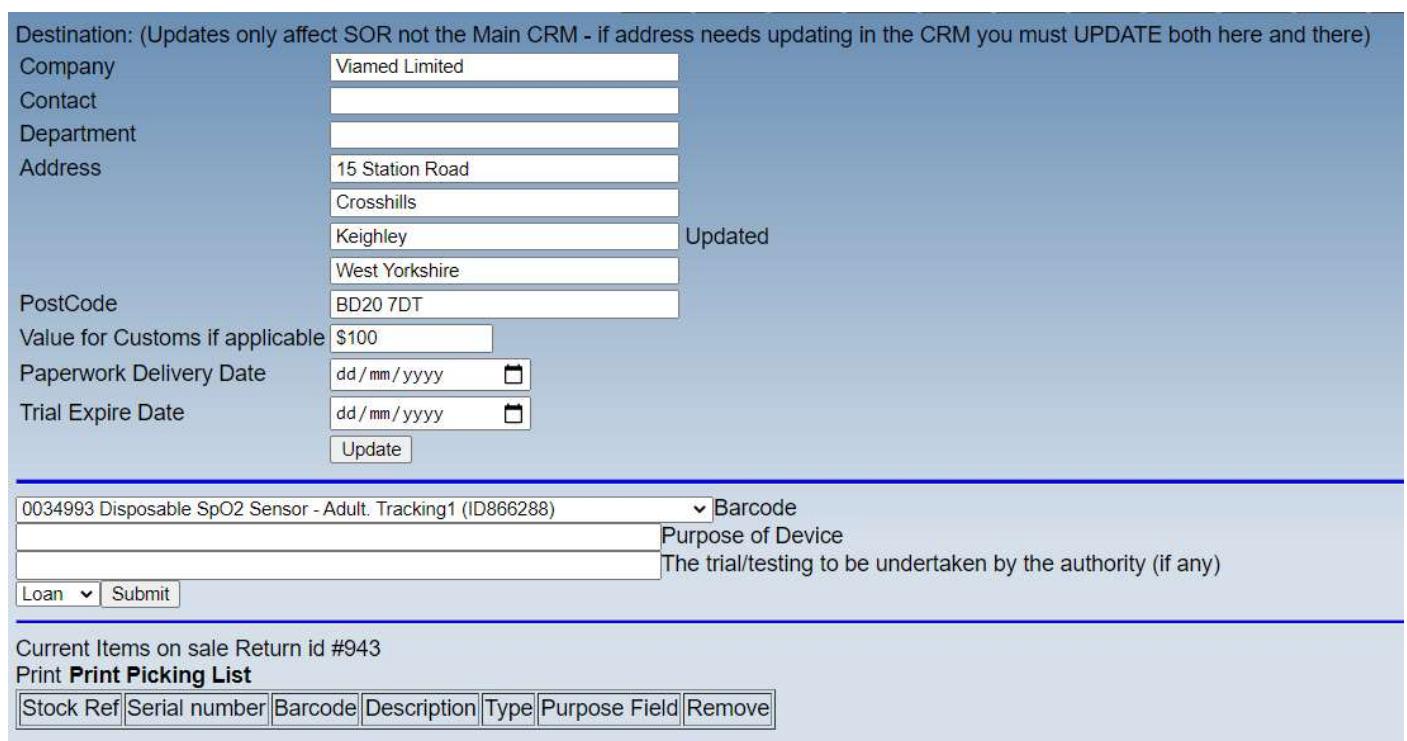
0012101 Pulse Oximeter VM 2101 90800125 (ID959730) ▾ Barcode  
Finger Pulse Oximeter Purpose of Device  
Sale or Return trial to determine suitability prior to purchase The trial/testing to be undertaken by the authority (if any)  
Loan ▾ Submit

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

30. Should the items be disposable, select 'Giving' from the dropdown menu.

31. Repeat for all items required.

32. 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: Viamed Limited  
Contact:   
Department:   
Address: 15 Station Road  
Crosshills  
Keighley  
West Yorkshire  
BD20 7DT Updated  
PostCode: BD20 7DT  
Value for Customs if applicable: \$100  
Paperwork Delivery Date: dd/mm/yyyy   
Trial Expire Date: dd/mm/yyyy   
Update

0034993 Disposable SpO2 Sensor - Adult. Tracking1 (ID866288) ▾ Barcode  
Purpose of Device  
The trial/testing to be undertaken by the authority (if any)  
Loan ▾ Submit

Current Items on sale	Return id #943					
Print <a href="#">Print Picking List</a>						
Stock Ref	Serial number	Barcode	Description	Type	Purpose Field	Remove

33. Make sure you have set the correct "Paperwork Delivery Date", check with Goods Out when they expect to dispatch the item and include this date.

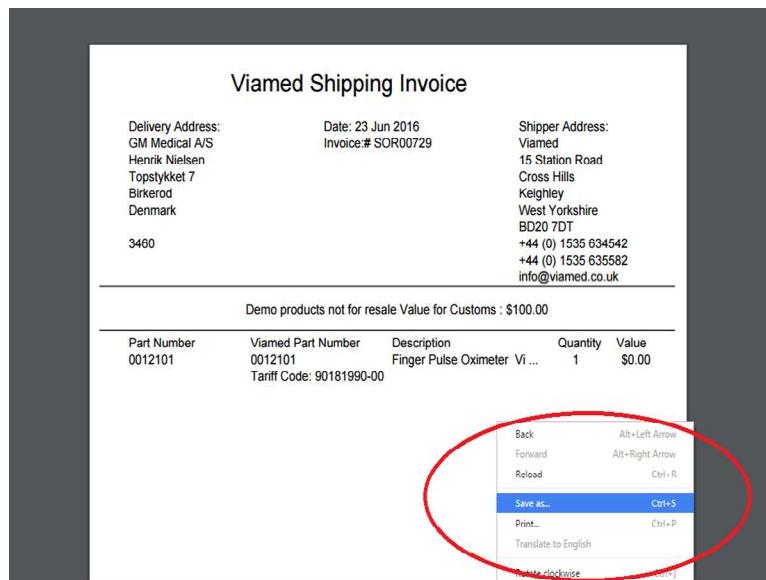
34. Update the trial expiry date to 4 weeks after the "Paperwork Delivery Date".

35. 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.



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

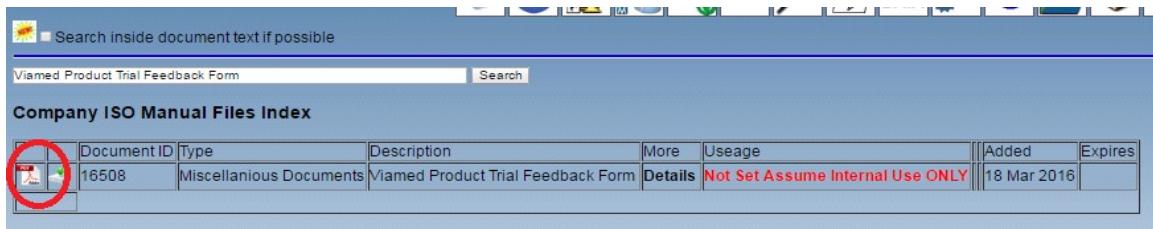
Export: 'SOR Shipping Invoice - \*Customer Name\* - SOR\*\*\* - date backwards'  
 UK: 'SOR Delivery Note - \*Customer Name\* - SOR\*\*\* - date backwards'



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



37. Click on the PDF icon



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	Zoey Teal

- 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

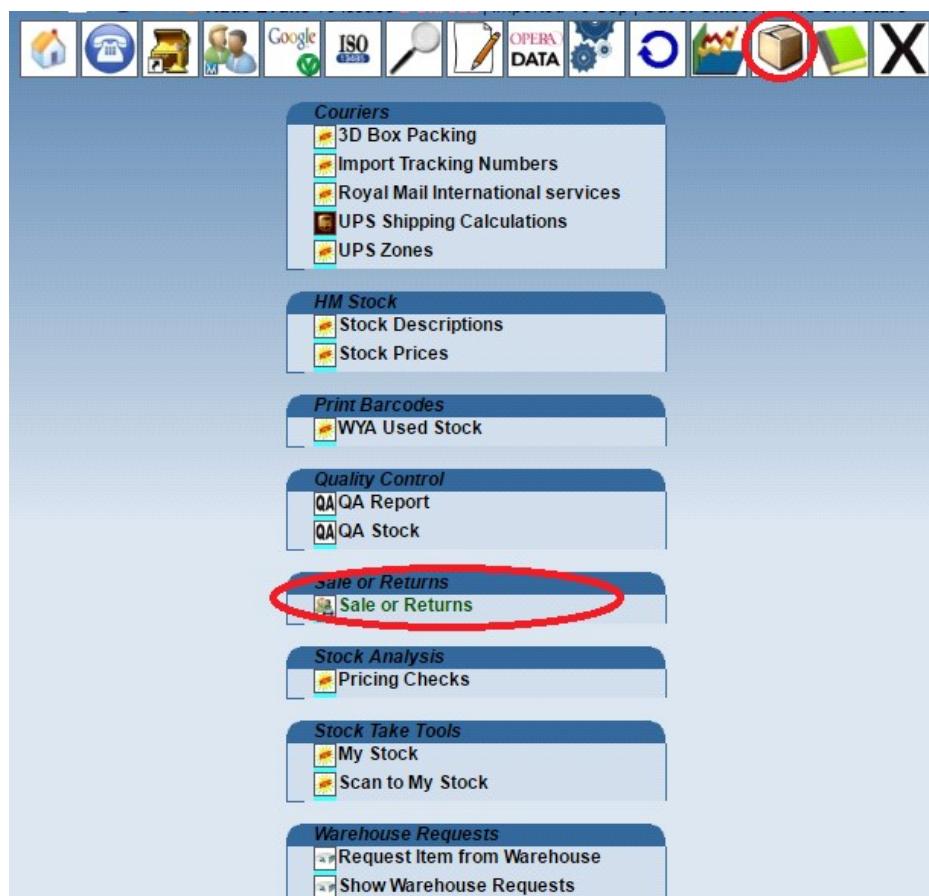
the contact is not available.

The sender needs to schedule themselves a further follow up issue 1 week after first chase if not response is received.

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' .

A screenshot of the 'Add a New Sale / Return' page. At the top, there is a header with the text 'Add a New Sale / Return Completed Sale / Returns' and a button labeled 'analyse\_sale\_return' (which is circled in red). Below the header, there is a note: 'Please Send with all sale or return goods the'. Underneath this, there is a link to 'Product Trial - Sale or Return Terms and Conditions' and 'Viamed Product Trial Feedback Form'. At the bottom, there is a table with columns for SOR, Issue ID, Items, Account, Created, Name, Add, Shipping Notes, and Send. The table contains three rows of data.

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	<span style="background-color: #90EE90; border-radius: 50%; padding: 2px 5px;">I've chased this up</span>
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	<span style="background-color: #90EE90; border-radius: 50%; padding: 2px 5px;">I've chased this up</span>

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.

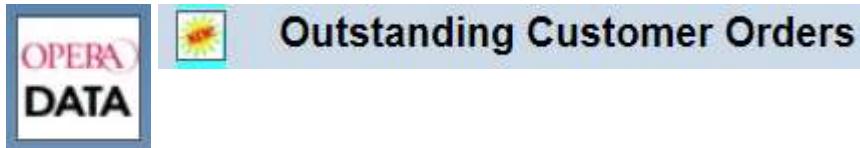
Include SOR reference in the notes for easy reference/searching.

 Production	Production Schedule	 106
 CE Technical Files	CE Technical Files	 29
 Feedback	Company Innovation	 2
 Feedback	Customer Feedback Negative	 157
 Feedback	Customer Feedback Positive	 107
 Feedback	Product Feedback Negative	 403
 Feedback	Product Feedback Positive	 134
 Feedback	Product Innovation	 3
 Feedback	Systems Innovation	 2
 Feedback	VIAMED Feedback	 182
 Product Categories	Oxygen Hoods	 9
 Product Categories	Product Categories	 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  button against the correct quote line.

52. Click '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'

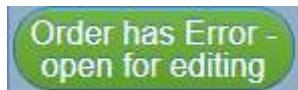
**Note:** If the customer chooses to add any additional items to the order, add notes to the order stating which items need shipping and which only need to be invoiced. Skype or Call Goods out to confirm notes have been added.

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 

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\*\*\*\*\*.