

6th July 2022 - General Office Update Training with Aqib and Janine

- **Symbols** not for use in Intrastats memos: ‘ ’ @
- **Phone Calls**; all calls *must be answered* in the first 2-3 rings.
 - Calls can be from any of the 3 companies, currently there are 2 lines
 - Viamed
 - Vandagraph / VST (this may change in future to 2 separate lines)

You should be at a stage now where you feel confident enough with the systems that you can answer more incoming telephone calls. Should you feel you require more training or require any additional tools/equipment to do this, please let us know.

- **Call/Email Log**

All calls / email where a customer asks for information or has a query you need to provide further information for needs to be logged on the call log. These must be linked to the relevant account. Any problems with filling this out please see COP ??

Should you provide a price to a customer, please make a note of this in the notes section but also click the white square box to the right of the price given.

DO NOT copy and paste full emails, as this can make the CRM history screen too long.

- **Serial Numbers and Warranty Check**

To find serial numbers and if in warranty, use the dropdown menu on the top right of the screen (Barcodes/SN). Locate the serial number you have entered and click the green “Check” button in the warranty column.



- **UK Quotes**

The majority of the time, if a UK hospital requires a quote they are looking for a price therefore in the first instance when a quote is requested provide them with the price of the product plus carriage charges and/or price list. You can then state at the end of the email “Should you require any official quotation, please contact us”.

- **SRS Accounts**

When adding an SRS to the system, please make sure you put it on the same account in which the product was purchased. To check this, use the menu; barcodes/SN.

- **Difference between CIP/CPT**

- CIP: Carriage Insurance Paid
- CPT: Carriage Paid To

- **Order Checking**

Whilst training, please allow other employees to check your orders, Aqib/Janine should not for the foreseeable be checking each other's work.

If the office is short staffed, please ask another colleague to check your work.

- **Priorities**

There is a priority 1 available for any orders which are deemed as urgent and must be sent out the same day (if it is past the cut off times, you must check with goods out before adding a priority one). Any priority ones must be signed off by a director.

- **Warehouse Requests**

If a customer orders a product which are out of stock of and we do not have any on order with the supplier, please send a warehouse request through Intrastats. Quickest way to do this is go to the stock part number and click the warehouse icon in the X menu on the stock line.



- **Emails**

When replying to emails which have been forwarded from the main account, please can you make sure you delete any of the forwarded from viamedinbox@gmail.com etc text and any internal messages between staff.