

VM3COP20.31 - Viamed Export Order Processing Procedure

We CANNOT sell any items to the following countries (See VM3COP20.053):

Syria
Iran
Cuba
North Korea
South Sudan
North Sudan
Republic Sudan
Myanmar
Crimea – Region of Ukraine.

Consult with the International Sales Manager if you receive any enquiries

We CANNOT sell products from the USA (Teledyne, Maxtec, Posey, etc) to the following countries:

Cuba
Iran
North Korea
Sudan
Syria
Libya

Consult with the International Sales Manager if you receive any enquiries

USA – direct enquirer to the original manufacturer

Products we CAN sell to the USA:

V1000 Foetal Heart Simulator

Things to remember:

- Check if customer is a proforma or account customer
- If pre-payment has been made, make sure you attach copy to 'Payment Notification if applicable' and click 'Order Prepaid'.

Order Prepaid



NEVER accept a credit or debit card for export orders unless instructed to do so by the accounts department. Please note, we cannot accept American Express cards under any circumstances.

- How are they paying? Do you need bank or PayPal charge?
 - PayPal charge is 6% of the proforma/order total
 - Bank charges are \$25 as standard, if paying in Euros there typically are no bank charges – check account memos
- Insurance is 1% of goods total (ex VAT) minimum of £10.00
- Correct Incoterms (EXW for customers own account, CIP/CPT for courier that we arrange on customers behalf, not including UPS)
- EXW need customer courier account number and service required (where applicable) on ORD
- If turning a proforma into an order, write box size in the 'Notes' section
- Check if any documentation is needed, speak to International Sales Manager if unsure.
- UPS require a post/zip/area code for all orders
- The contact on the order must be the individual contact's name, not the company name
- Applicable account memos must be written in the 'notes' section when processing.

Orders most frequently arrive via email, but they may also be faxed, sent through an e-procurement system or sent in the post; some customers also order over the telephone or upload directly to our website.

Telephone Order ID 5447

Contact Name: Caroline Aplin
 Contact Department:
 Contact Email: S00005130@fakemail.com
 Contact Telephone: 01803 654548

Delivery Address
 Torbay Hospital
 Stock Control - Medical Equipment
 Lawes Bridge
 Devon
 Torquay
 TQ2 7AA

Invoice Address
 Torbay & South Devon NHS
 Foundation Trust, Accounts
 Payable Dept, Regent House
 Regent Close
 Torquay
 TQ2 7AN
 01803 653393

Order Notes:
 3X 0021013
 Order Number:
 1204291

Credit Card Details:
 Card Type:
 Name On Card:
 Card No. **** *
 Card Type:
 Issue Number:
 Security Number:
 Start Date:
 End Date:
 Registered House Number
 Registered Post Code

Telephone Orders

A telephone order will appear as shown to the left. The delivery and invoice addresses are noted, as are the contact name, order number and product details.

If you have taken the order yourself, this needs to be printed to PDF before processing.

Please see VM3COP27.29 for details on how to take a telephone order.

PURCHASE ORDER

Order No: 1204291
 Order Date: 13/06/2016
 Order Time: 10:54:58
 Order Status: OPEN
 Order Type: STANDARD
 Order Reference: 1204291

TO: Torbay & South Devon NHS Foundation Trust
FROM: Viamed Ltd
DATE: 13/06/2016
TIME: 10:54:58
STATUS: OPEN
REFERENCE: 1204291

Line	Qty	Unit Price	Total Price	Product Code	Description
1	1.00	10.00	10.00	00000001	STANDARD PURCHASE ORDER
2	1.00	10.00	10.00	00000002	STANDARD PURCHASE ORDER
3	1.00	10.00	10.00	00000003	STANDARD PURCHASE ORDER
4	1.00	10.00	10.00	00000004	STANDARD PURCHASE ORDER
5	1.00	10.00	10.00	00000005	STANDARD PURCHASE ORDER
6	1.00	10.00	10.00	00000006	STANDARD PURCHASE ORDER
7	1.00	10.00	10.00	00000007	STANDARD PURCHASE ORDER
8	1.00	10.00	10.00	00000008	STANDARD PURCHASE ORDER
9	1.00	10.00	10.00	00000009	STANDARD PURCHASE ORDER
10	1.00	10.00	10.00	00000010	STANDARD PURCHASE ORDER
11	1.00	10.00	10.00	00000011	STANDARD PURCHASE ORDER
12	1.00	10.00	10.00	00000012	STANDARD PURCHASE ORDER
13	1.00	10.00	10.00	00000013	STANDARD PURCHASE ORDER
14	1.00	10.00	10.00	00000014	STANDARD PURCHASE ORDER
15	1.00	10.00	10.00	00000015	STANDARD PURCHASE ORDER
16	1.00	10.00	10.00	00000016	STANDARD PURCHASE ORDER
17	1.00	10.00	10.00	00000017	STANDARD PURCHASE ORDER
18	1.00	10.00	10.00	00000018	STANDARD PURCHASE ORDER
19	1.00	10.00	10.00	00000019	STANDARD PURCHASE ORDER
20	1.00	10.00	10.00	00000020	STANDARD PURCHASE ORDER
21	1.00	10.00	10.00	00000021	STANDARD PURCHASE ORDER
22	1.00	10.00	10.00	00000022	STANDARD PURCHASE ORDER
23	1.00	10.00	10.00	00000023	STANDARD PURCHASE ORDER
24	1.00	10.00	10.00	00000024	STANDARD PURCHASE ORDER
25	1.00	10.00	10.00	00000025	STANDARD PURCHASE ORDER
26	1.00	10.00	10.00	00000026	STANDARD PURCHASE ORDER
27	1.00	10.00	10.00	00000027	STANDARD PURCHASE ORDER
28	1.00	10.00	10.00	00000028	STANDARD PURCHASE ORDER
29	1.00	10.00	10.00	00000029	STANDARD PURCHASE ORDER
30	1.00	10.00	10.00	00000030	STANDARD PURCHASE ORDER
31	1.00	10.00	10.00	00000031	STANDARD PURCHASE ORDER
32	1.00	10.00	10.00	00000032	STANDARD PURCHASE ORDER
33	1.00	10.00	10.00	00000033	STANDARD PURCHASE ORDER
34	1.00	10.00	10.00	00000034	STANDARD PURCHASE ORDER
35	1.00	10.00	10.00	00000035	STANDARD PURCHASE ORDER
36	1.00	10.00	10.00	00000036	STANDARD PURCHASE ORDER
37	1.00	10.00	10.00	00000037	STANDARD PURCHASE ORDER
38	1.00	10.00	10.00	00000038	STANDARD PURCHASE ORDER
39	1.00	10.00	10.00	00000039	STANDARD PURCHASE ORDER
40	1.00	10.00	10.00	00000040	STANDARD PURCHASE ORDER
41	1.00	10.00	10.00	00000041	STANDARD PURCHASE ORDER
42	1.00	10.00	10.00	00000042	STANDARD PURCHASE ORDER
43	1.00	10.00	10.00	00000043	STANDARD PURCHASE ORDER
44	1.00	10.00	10.00	00000044	STANDARD PURCHASE ORDER
45	1.00	10.00	10.00	00000045	STANDARD PURCHASE ORDER
46	1.00	10.00	10.00	00000046	STANDARD PURCHASE ORDER
47	1.00	10.00	10.00	00000047	STANDARD PURCHASE ORDER
48	1.00	10.00	10.00	00000048	STANDARD PURCHASE ORDER
49	1.00	10.00	10.00	00000049	STANDARD PURCHASE ORDER
50	1.00	10.00	10.00	00000050	STANDARD PURCHASE ORDER
51	1.00	10.00	10.00	00000051	STANDARD PURCHASE ORDER
52	1.00	10.00	10.00	00000052	STANDARD PURCHASE ORDER
53	1.00	10.00	10.00	00000053	STANDARD PURCHASE ORDER
54	1.00	10.00	10.00	00000054	STANDARD PURCHASE ORDER
55	1.00	10.00	10.00	00000055	STANDARD PURCHASE ORDER
56	1.00	10.00	10.00	00000056	STANDARD PURCHASE ORDER
57	1.00	10.00	10.00	00000057	STANDARD PURCHASE ORDER
58	1.00	10.00	10.00	00000058	STANDARD PURCHASE ORDER
59	1.00	10.00	10.00	00000059	STANDARD PURCHASE ORDER
60	1.00	10.00	10.00	00000060	STANDARD PURCHASE ORDER
61	1.00	10.00	10.00	00000061	STANDARD PURCHASE ORDER
62	1.00	10.00	10.00	00000062	STANDARD PURCHASE ORDER
63	1.00	10.00	10.00	00000063	STANDARD PURCHASE ORDER
64	1.00	10.00	10.00	00000064	STANDARD PURCHASE ORDER
65	1.00	10.00	10.00	00000065	STANDARD PURCHASE ORDER
66	1.00	10.00	10.00	00000066	STANDARD PURCHASE ORDER
67	1.00	10.00	10.00	00000067	STANDARD PURCHASE ORDER
68	1.00	10.00	10.00	00000068	STANDARD PURCHASE ORDER
69	1.00	10.00	10.00	00000069	STANDARD PURCHASE ORDER
70	1.00	10.00	10.00	00000070	STANDARD PURCHASE ORDER
71	1.00	10.00	10.00	00000071	STANDARD PURCHASE ORDER
72	1.00	10.00	10.00	00000072	STANDARD PURCHASE ORDER
73	1.00	10.00	10.00	00000073	STANDARD PURCHASE ORDER
74	1.00	10.00	10.00	00000074	STANDARD PURCHASE ORDER
75	1.00	10.00	10.00	00000075	STANDARD PURCHASE ORDER
76	1.00	10.00	10.00	00000076	STANDARD PURCHASE ORDER
77	1.00	10.00	10.00	00000077	STANDARD PURCHASE ORDER
78	1.00	10.00	10.00	00000078	STANDARD PURCHASE ORDER
79	1.00	10.00	10.00	00000079	STANDARD PURCHASE ORDER
80	1.00	10.00	10.00	00000080	STANDARD PURCHASE ORDER
81	1.00	10.00	10.00	00000081	STANDARD PURCHASE ORDER
82	1.00	10.00	10.00	00000082	STANDARD PURCHASE ORDER
83	1.00	10.00	10.00	00000083	STANDARD PURCHASE ORDER
84	1.00	10.00	10.00	00000084	STANDARD PURCHASE ORDER
85	1.00	10.00	10.00	00000085	STANDARD PURCHASE ORDER
86	1.00	10.00	10.00	00000086	STANDARD PURCHASE ORDER
87	1.00	10.00	10.00	00000087	STANDARD PURCHASE ORDER
88	1.00	10.00	10.00	00000088	STANDARD PURCHASE ORDER
89	1.00	10.00	10.00	00000089	STANDARD PURCHASE ORDER
90	1.00	10.00	10.00	00000090	STANDARD PURCHASE ORDER
91	1.00	10.00	10.00	00000091	STANDARD PURCHASE ORDER
92	1.00	10.00	10.00	00000092	STANDARD PURCHASE ORDER
93	1.00	10.00	10.00	00000093	STANDARD PURCHASE ORDER
94	1.00	10.00	10.00	00000094	STANDARD PURCHASE ORDER
95	1.00	10.00	10.00	00000095	STANDARD PURCHASE ORDER
96	1.00	10.00	10.00	00000096	STANDARD PURCHASE ORDER
97	1.00	10.00	10.00	00000097	STANDARD PURCHASE ORDER
98	1.00	10.00	10.00	00000098	STANDARD PURCHASE ORDER
99	1.00	10.00	10.00	00000099	STANDARD PURCHASE ORDER
100	1.00	10.00	10.00	00000100	STANDARD PURCHASE ORDER

Total Order: 10.00
 VAT Total: 10.00
 Total: 20.00

13/06/2016 10:54:58
 13/06/2016 10:54:58

Fax Orders

Orders which arrive via fax will appear the same way as an email PDF order and should be processed normally. They are sent to fax@viamed.co.uk

Please remember to acknowledge the order and advise of expected dispatch date by email if an email address has been supplied, or by fax if no email address is available on the purchase order or IntraStats Customer Relationship Management (CRM) system.

Email Orders

Google Gmail interface showing an email from PECOS eProcurement. The email subject is "Purchase Order GMPN942666 - Attached are documents related to purchase order GMPN942666". The email is dated 09:54. The email body contains a PDF attachment titled "Purchase Order GMPN942666". The email is from PECOS eProcurement <support@elcom.com> to Viamed <viamed@viamed.co.uk>. The email is marked as "Unread".

When an order is received in the main inbox, click on it to open it.

Click the arrow on the right and click forward.

Google Gmail interface showing the email content. The email is from PECOS eProcurement <support@elcom.com> to Viamed <viamed@viamed.co.uk>. The email is dated 09:53 (3 minutes ago). The email body contains a PDF attachment titled "Purchase Order GMPN942666". The email is marked as "Unread".

Forwarded message:
 From: PECOS eProcurement <support@elcom.com>
 Date: 13 June 2016 at 09:53
 Subject: Purchase Order GMPN942666
 To: Viamed <viamed@viamed.co.uk>

Attached are documents related to purchase order GMPN942666

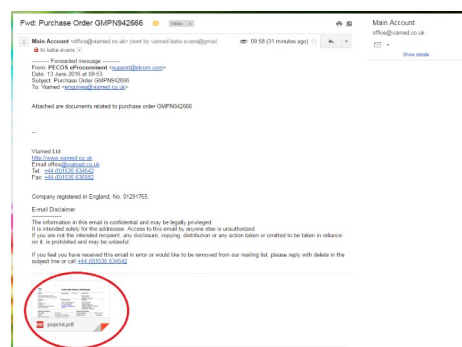
Viamed Ltd
<http://www.viamed.co.uk>
 Email: office@viamed.co.uk
 Tel: +44 (0)1535 634642
 Fax: +44 (0)1535 635582

Company registered in England. No. 01281765

Send (Ctrl Enter)

Type your vmsecure into the 'To:' field and click send. E.g. firstname.lastname@vmsecure.me.uk

When the email arrives in your inbox, click on it to open it.



Click on the attachment, where provided, to open it.



Click the download button at the top of the page and open to view contents. Please be aware of where this is downloaded to as you will need it later to upload to the order processing page.

Follow the steps on VM3COP20.16 for eBay for downloading the documents then following the order processing procedure below.


Order Processing

From IntraStats, using the drop down menu at the top right of any screen, click the arrow and select 'Contacts', in the Search box type the name of the Company you wish to process the order for. Use the following buttons to open in current tab, new tab or to look up search histories or saved searches.




Click the hospital/company name you are processing the order for. Any line highlighted in green is an account which has been used recently within the new system.

For example Merivaara...

Hospital / Organisation Names									
HOST COMPANY		Customer		Customers Company					
<input type="checkbox"/>	 Viamed	CID3975 / 00007515	Contacts #10	Merivaara AB	Helsingborg	25442	0046 862 72950	Company Distributor	Credit Credit C Extra Search
Request Merge Companies									

This will open up a page similar to this:



Merivaara AB

 CID3975 Opera 00007515 Type:Company Distributor
 Merivaara AB Hävertgatan 21, , Helsingborg, , 25442, Sweden
 Tel 004686272950 [Log Call](#)
 Credit Credit C VAT SE556616030401

[Account Home](#)
[Main Details](#)
[Account Memos](#)
[Sales History](#)
[Stock References](#)
[Customer Returns](#)
[Service Visits](#)
[Distributor Agreements](#)
[Documents Files](#)
[Linked Issues](#)
[Regulatory Agreements](#)


CONTACTS

[Add New Contact](#)
[Merge Contacts](#)
[Hidden/Removed Contacts](#)

Contact	Sales Order	Purchase Order	Contact Actions	Department	Position	Direct Phone	Email	Head of
No Name	M Viamed Add S.O.						info@merivaara.se	[X]
No Name	M Viamed Add S.O.						sales.sweden@merivaara.com	[X]

On the order PDF, find the contact name. If this can not be found, use the name at the bottom of the email. Then find this name on the company/hospital list on Intrastats and click the Add S.O. button to the left of the name.

**This opens the customer order processing page, it will also show you the order number beginning, CVM (for Viamed orders)
CAN (for Vandagraph orders)
CST (for VST orders)**



Vendor 800235
VIAMED LTD

Recipient
Merivaara AB
 Hävertgatan 21
 25442 HELSINGBORG
 SWEDEN

Purchase order

Date: 3.5.2022
 Number: 00010682_048-1
 Page: 1 / 1
 Last confirm. date: 10.05.22
 Reference: Helsingborg
 Delivery terms:
 Mode of delivery:
 Delivery date: 3.5.2022
 Terms of payment:
 Currency: EUR
 Contact person: Wennerström, SEC, NOC

Invoicing address
Merivaara AB
 Hävertgatan 21
 25442 HELSINGBORG
 SWEDEN

Item number	Description and drawing no	Quantity	Unit	Price/unit.	price per	Disc %	Line amount	Div. date
0012166	VM-2160 SMARTsat	4,00	St	245,000	1		980,000	3.5.2022
FxSalesItemTemp-00								

If the 'Add S.O.' button does not show, please follow these steps:




1. Go to Main Details page, and check that there is a 'Price List to Use' selected.



2. Edit the contact who you want to assign the order to, scroll to the bottom of the page and check that 'Allow Sales Order' is ticked.

3. Scroll to the top of the page and click 'Update Details Below' button.

Depending if this account has been used before, you may be required to fill in some additional information, see below:



Viamed Customer Order CVM127068

DELETE Order
127068

Viamed Account - Please Fill in the Following:

Main Details

Opera_Region	<input type="text"/>
Opera_Territory	<input type="text"/>
Opera_Cust_type	<input type="text"/>
Opera_Price List	<input type="text" value="0001"/>
Opera I Account if applicable	<input type="text"/>
Vat Number	<input type="text"/>

0001 - UK GBP End User

Returning to create the order you are processing, please make sure all fields are completed:

Order id	#138242	This can be Order, Proforma or Quotation
HOST COMPANY	<input checked="" type="checkbox"/> Viamed Customer	
Order Type	Customer Order	
Order Prepaid	<input type="checkbox"/>	Click this if payment has been received, make sure you upload document below
Card Payment	<input type="checkbox"/>	
Contact Name	Ebay Sale	
End User If Known		
Customer Reference	Non given	Click this if a card payment is required
Customer Reference Extra Line		
Customer Contact Tel		
Customer Order PDF	Please Enter Customer Reference	When a customer reference is added, the below will appear:
VAT Exempt Certificate	No	
Payment Notification if applicable	<input type="button" value="Choose file"/> No file chosen <input type="button" value="Upload File"/>	<input type="button" value="Choose file"/> No file chosen <input type="button" value="Upload File"/>
Shipping Charges / Weight / Dimensions Information PDF	<input type="button" value="Choose file"/> No file chosen <input type="button" value="Upload File"/>	Upload document here, if payment has been received
Weight / Dimensions used for Shipping charges information		<input type="button" value="Update Weights"/>
Order Priority	0	See page 13
Due Date	18/07/2022 <input type="button" value="Update"/> <input type="button" value="Update Includ Details"/>	
Inco Terms		See the following page for definitions
Incoterms Location (Company, Country i.e. Medivent, Ireland) See VM3COP20.30 (EXW Set as Viamed, UK)		
OUR Staff Name FOR Paperwork		IncoTerms Location (see following page)
Part Ship Allowed	<input type="checkbox"/>	Select the person processing the order
Ship Early Allowed	<input type="checkbox"/>	
Hold / Stop Invoices being sent	<input type="checkbox"/>	
Hold Picking	<input type="checkbox"/>	

Make sure any telephone numbers above do not have any spaces.
 Note: All NHS customers MUST provide a valid purchase order number.

Account Memos - Check if there are any account memos for this order, this can be found by hovering over the text "Account Memo (Hover to read)" at the top of the screen.

Account Memo (Hover to read)

Incoterms 2020

Incoterms should be set on the CRM account main details page. When an order is created and the field is not prefilled, you will need to select the relevant code from the drop down and update the main accounts details for the account, this will then be automatically filled when a new order is generated.

The *IncoTerms Location* should also be prefilled from the main account details, if not, please complete with the relevant details as noted below. Then update the main details page of the account so that it prefills on future orders.

Note: Once an order is started, any prefilled data that is not already completed in the CRM main details page will not prefill your order. If you update the main details page after generating an order number it will not reflect on the order. Please fill it in on both the main details page and the order before proceeding.

EXW – Ex-Works

These are shipments, which once they have been collected by the courier or customer and have gone over the threshold of our premises, are the responsibility of the buyer.

For example UPS (own account only), DHL, Kuehne + Nagel.

Location will always be **Viamed, UK**.

Top section of order: **EXW** (dropdown), **IncoTerms Location: Viamed, UK**

Stock Delivery Line: EXW

Memo:

Consigned to: "Courier", account *****

Example - **Consigned to: TNT, account *******

CPT – Carriage Paid to

Examples of this type of shipment are UPS and Royal Mail where Viamed has contracted the courier and is paying the invoice for the service. This is where we charge the customer a carriage cost, also where carriage is included in the price of the product i.e. Posey Wraps within the UK.

IncoTerms Location: **"Company/Hospital/Agreed Location"** i.e. airport, dock (agreed location to which a shipment is expected to arrive) **", Country"**.

Top section of order: **CPT (dropdown)**, *Example* IncoTerms Location: **Medivent, Ireland** or **Airedale General Hospital, UK**.

Note: Should the order be for an end user then the location would be the **City, Country** rather than Company, Country.

CIP – Carriage and Insurance Paid

Similar to CPT, examples of this type of shipment are UPS and Royal Mail where Viamed has contracted the courier and is paying the invoice from the courier for the service. This is where we charge the customer a carriage cost, also where carriage is included in the price of the product i.e. Posey Wraps within the UK.

The difference between CPT and CIP is that insurance is also listed and charged to the customer on the invoice to cover the shipment.

See page 11 regarding insurance charges

IncoTerms Location: “**Company/Hospital/Agreed Location**” i.e. airport, dock (agreed location to which a shipment is expected to arrive) “, **Country**”.

Top section of order: CPT (dropdown), Example IncoTerms Location: **Medivent, Ireland** or **Airedale General Hospital, UK**.

Note: Should the order be for an end user then the location would be the **City, Country** rather than Company, Country.

Carriage / Delivery Codes

Priority 1 – Urgent order to be processed immediately (only to be used when the purchase order/customer states it is urgent or MUST be shipped same day)

Priority 2 – Courier other than UPS or Royal Mail

Priority 3 – UPS – all services

Priority 4 – Royal Mail – all services

Carriage Charges



To establish which courier to use, check the Account Memos and previous invoices.

To find previous invoices, return to companies CRM page click the ‘Sales History’ button, then scroll to the first invoice number and click the PDF icon.

Download Excell											
Order	Customer Ref	Order Confirmation	Delivery Note	Tracking	Invoice	Goods	VAT	Total	Paid Flag	Matched ID	Amount Rec
135971	00010633_048-1	CVM135971 15 Mar 2022	DVM135971-1	16 Mar 2022 UPS 1Z9W96386877088300	RVM135971-1 16 Mar 2022	587.15	0.00	587.15	Check Xero		

On this invoice it showed that PPUPS – UPS Standard was used:

PPUPS6	UPS Courier Delivery - Standard 1z9w96386877088300	41.75	0.00	41.75
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Enter the required price into the ‘Unit Price’ box, leave blank if the carriage is to be added by goods out, click ‘Add to Order’ to complete the line.

If you are unsure of which courier to use or of how much carriage to charge, check the IntraStats memos or check with colleagues in the office / Goods Out department.

All export orders are shipped via UPS unless advised otherwise by the account memo.

For customers with a credit account, enter the ‘Stock Item’ as ‘PPUPS6’ for delivery addresses in the EU or ‘PPUPS7’ for delivery addresses outside of the EU. Enter the quantity as 1 and leave the ‘Sell’ box empty and click ‘Add to Order’.

PPUPS6 refers to UPS Standard service which is not always available outside of the EU, check Account Memos and previous orders for correct UPS service.

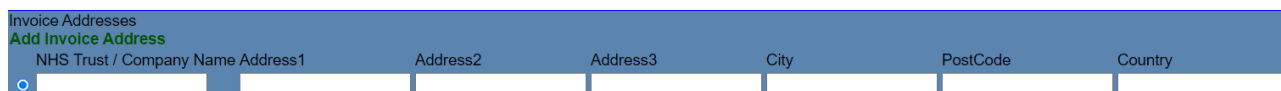
Should you be processing a proforma or quote for a customer, please refer to VM3COP20.35 UPS Calculator on how to calculate delivery charge.

On standard orders, where carriage is not calculated, ENSURE you add notes to the 'Notes' box to say, 'Carriage to be added'.

Invoice and Delivery Address

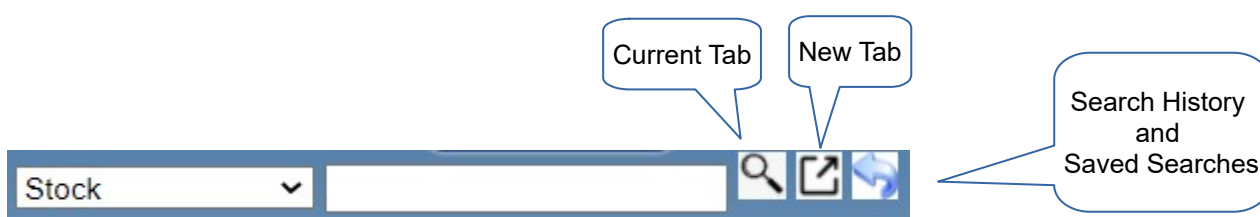
From the purchase order please select, using the white circle radio button to the left of the line, the correct invoice and delivery addresses from the list provided.

Should the relevant address not be included please click 'Add Invoice Address' or 'Add Delivery Address', this will refresh the page and provide you with fields to input.



Check Stock Quantities

Using the drop down menu to the top right of any Intrastats screen. Click the arrow and select 'Stock', in the search box for the part number and click the relevant icon, as below.



When you have found the product code you require, click on the BOX icon to display the current stock levels.



If there is no stock, please make sure you inform the customer and provide a lead-time, where possible. If alternatives are available you may provide them with these options also.

You should also check the '£' page and check if the item requires a carriage charge. Currencies and customers that qualify for free carriage have a statement highlighted in blue next to their price.

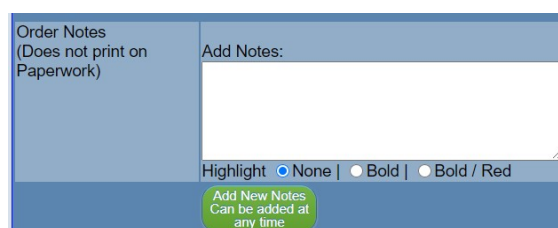
For distributor and automotive carriage charges, see VM3COP20.34

Check these details for all products listed on the purchase order.

If these details are incorrect or if applicable carriage charges have not been added to the purchase order, return to the order processing page and change the priority to '8', please contact the customer before proceeding. Contact the customer by telephone, if possible, but email if they are unavailable. Please add any correspondence or notes to goods out on the notes section.

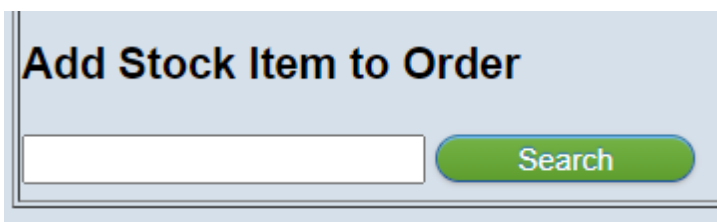
Order Notes

Add any notes in the orders notes text box on the order processing page of any contact you have had with the customer and their response. If the customer accepts the changes and is happy to proceed, change the priority back to the appropriate number and proceed to checking.



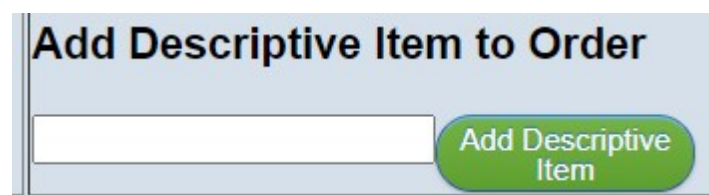
Note: ALL orders must be entered into IntraStats even if awaiting action so please continue adding the order by following this procedure but leave on a priority 8 until agreed with the customer to proceed.

Adding Stock



When you are satisfied that all the prices and carriage charges are correct, return to the customers CVM in IntraStats and proceed as follows. Make sure you leave on a priority 8 if you are still waiting for confirmation from the customer.

Enter the part number in the 'Add Stock Item to Order' box.



Should there be no part number, items can be added in the 'Descriptive Item' box.

Enter the quantity required, please note the price should change accordingly if quantity discounts are available. Leave the due date unless you have different requirements per line. As this is set by the overall 'Due Date' at the top of the page.

Ensure the pricing and quantities are correct before proceeding. When confirming a price discrepancy on a purchase order, we must ensure that we advise the customer whether the price is simply incorrect or whether a price break applies to the quantity that they have ordered.

Once happy all information is correct, click 'Add to Order'.

PriceList	Stock Reference	Description	Quantity On Order	Unit Price	Due Date	Add To Order
0001	0110017	Teledyne Oxygen Sensor R-17MED	<input type="text"/>	\$ 42.00	09/11/2020	<input type="button" value="Add to Order 42.00"/>

When all items on the purchase order have been entered, the carriage must be added.
All Viamed orders must include a carriage line.

Bank Charges

If the customer is paying in USD's the standard bank charge is \$25 unless the memo states otherwise. Customers paying with EUR's do not get charged a bank charge.

Use the 'Reference' BC, the description will automatically change to 'Bank Charges'. If the customer is paying with PayPal, use reference 'Paypal', see page 14 to calculate PayPal charge. Enter the 'Quantity' as 1 and add the appropriate charge to the 'Sell' box. Click 'Add to order'.

Insurance

Next, enter the insurance. Unless advised otherwise by the customer/system, all customers require insurance (either from Viamed or their own).

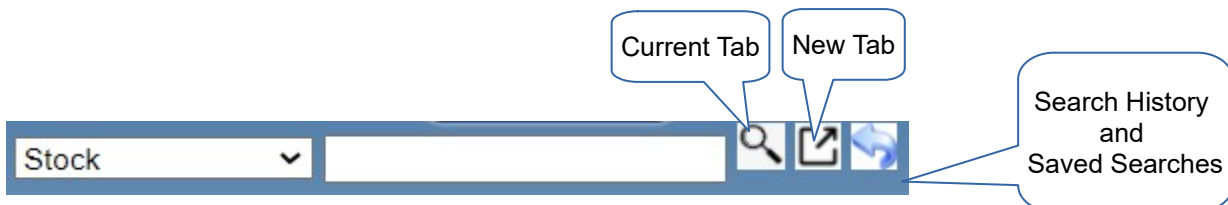
1. All distributor customers (price list 0004 and 0006) are now required to provide confirmation whether they have insurance or if we are to add this to their order. On a yearly basis they are required to complete the "Existing Distributor" form.
2. All end user customers are to be charged 1%.
3. Should the distributor require us to add the insurance, calculate 1% of the total goods value (ex-VAT, **minimum charge £10.00/€11.50/\$12.50**) and added to the INSURANCE line.
4. Should the customer decline insurance and are not covered with their own, they are responsible for the goods from the time they leave Viamed and Viamed take no responsibility for goods during shipping or delivery.
5. The relevant IncoTerms will be required depending on if the insurance is added to the order (CIP) or responsibility is of the distributor (CPT).

Part Shipments

Should Viamed be charging insurance on orders, then the following needs to be taken into account. If a customer requests part shipment for an order, the customer needs to be made aware that insurance will be charged on each shipment with a minimum charge applicable to each shipment sent out (£10.00/€11.50/\$12.50). This will be mostly relevant when orders are under £1000.

Stock Memos

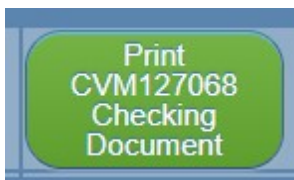
To check a stock memo, use the drop down menu to the top right of any screen. Click the arrow and select 'Stock', in the search box for the part number and click the relevant icon, as below.



Type in the part number or description required and click the new tab icon so that it opens the stock search in a separate tab.



Click the large M for 'Memo' against the part number you require and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.



Proofing / Checking Order / Error Amends

When you have all of the products and one carriage line entered into IntraStats, click 'Print CVM***** Checking Document', this will generate a PDF of the order. Check that all information is displayed correctly.

Should there be any errors click the back button on your browser and amend then repeat the step.

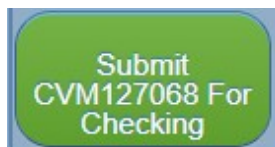
Item Reference	Description	Quantity	£ Unit	£ Unit Vat	£ Total
PPRD	Delivery - Royal Mail 1st Class Signed	1	0.00	0.00	0.00
0110017	Teledyne Oxygen Sensor R-17MED	1	42.00	8.40	50.40



If the carriage line is not situated below all the products on the order, return to the order processing screen and click the arrow at the end of the carriage line, this will move that line to the bottom of the order.

Once happy that the PDF is all displayed correctly, click the back button and this shall return you to the order processing page.

Submit for Checking



Now the order is ready for checking, click the 'Submit CVM***** for Checking' button and this will add the order to the list for checking. Send a Skype message to 'Viamed Order Checking' or 'Viamed Employees' group stating the CVM number and ask for someone to check. See VM3COP20.32 Order Checking for this process. Once checking has been completed, it will appear on the 'Active List' for goods out to process.

Large Value Order

If the order totals £10,000 or more, a director's sign off is required. Locate a director and ask them sign off on the system.

Order Acknowledgement

Acknowledge the order and advise customer of dispatch date, if requested or provide lead time should the items be currently out of stock.

Should an item be out of stock, check if there is an outstanding PO with supplier. This can be found in "Suppliers Back Order Status".

Suppliers Back Order Status												
Outstanding Orders as of Mar 21 2022												
Host	Supplier	P.O.	Date Ordered	Date Required	Order Confirmed	Estimate Ship	Part Number	Supplier Part Number	Description	Quantity Required	Quantity Received	Quantity Outstanding
M	Maxtec Inc	PVM2434	11 Mar 2022	11 Mar 2022	14 Mar 2022	26 Apr 2022	0310291	"R229P01-024"	MaxBlend 2 (NIST) Low Flow Blender-15 lpm flow meter	2		2
										2	0	2

If you click "Add Watch" you will be notified should the delivery date be amended. Please inform the customer of any estimated delivery date and updates, where necessary.

If there is no stock on order, please raise a warehouse request. Click



Go to "Request Item from Warehouse"
List items requested, also include order number in notes box. Click "Add".

Warehouse Requests		
	Request Item from Warehouse	
	Show Warehouse Requests	

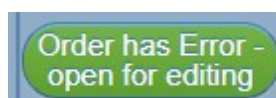
Editing an Order

If an order needs editing, for example, if the priority needs to be changed, click the 'Opera Data' icon in IntraStats and click 'Outstanding Customer Orders'. This will take you to a full list of orders being processed through the system.



Locate the order you want to edit and click the 'Details' button, this will open the order processing page as before.

To be able to edit, click the 'Order has Error – open for editing' button. Enter the reasoning for editing the order and click 'Confirm Open Order for Editing'. This opens the page so it is now editable then make amends as required. Should you wish to remove a line from the order, you must amend the quantity to 0 and refresh the page.



If the date on an order is changed, please check that the product lines have also updated. For example, if an order is put on as a forward date and then you edit the date after, the date will remain the same and Derek has to change this.

Once an order has been edited, it must be rechecked – following the steps in section ‘Submit for Checking’ section (page 11).

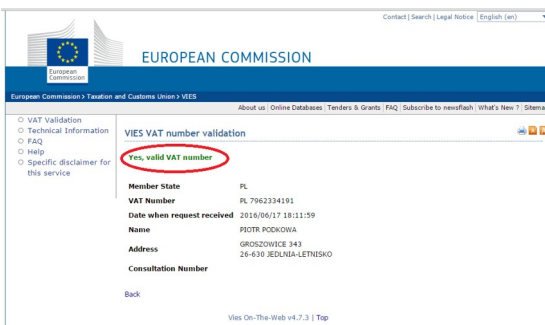
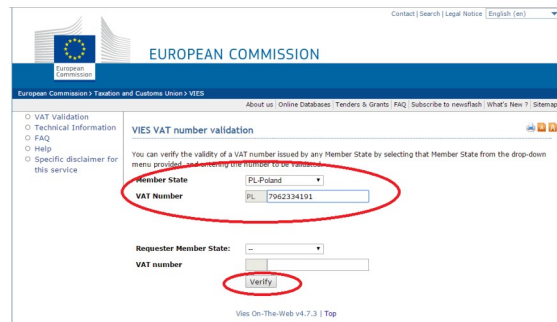
VAT

We do not charge VAT on any orders being shipped outside of the UK. Any duties and taxes will be charged to the recipient before they can be received.

VAT E Ensure the VAT is removed from product and carriage lines. To do this, click the box in the ‘VAT E’ column against the relevant line.

 For couriers, if available, customers are requested to provide VAT numbers. Once received, navigate to http://ec.europa.eu/taxation_customs/vies/vieshome.do on your browser.

In the ‘Member State’ box, click on the appropriate country, using the first two characters of the V.A.T. number to guide you. Click ‘Verify’.



If the V.A.T. number is correct, this message will be displayed. Print this and keep with the customer purchase order.



If the V.A.T. number is incorrect, you will receive this message. Send a copy of this to the customer and advise them that their VAT number is incorrect. Ask them for the correct version, if a valid V.A.T. number cannot be provided, ensure V.A.T. is charged.

Priority 1

If the purchase order states that the order is urgent, ensure stock is available and call the customer to ask which date they need the order for. If they need it the next day or you are unable to contact them, set the priority as ‘1’. Ask a director to sign off on the system. Add memo to the order stating: ‘When order picked inform:’ *Your name*.

Once checked, inform Goods Out that there is a priority 1 order on the system.

Discounts

If an order has a discount applied or has any free of charge items/carriage (lines which would normally be chargeable), ask a director to add note to the order notes before proceeding to the checking stage.

PayPal

On occasion, a customer may wish to pay via PayPal. Should this occur, add a line above the carriage line. Use reference 'PAYPAL', and calculate 6% of the total cost of the order including VAT (excluding this PayPal charge). Add this calculated charge to the 'Unit Price' box.

E.g. Products totalling £650 with a £10 carriage charge would equal £792 including VAT. The PayPal charge would be 6% of the total including VAT therefore the PayPal charge in this example is £47.52.



Should you need to insert a line you will need to reorder the lines click the arrow at the end of the line, this will move that line to the bottom of the order.

If no PO number is provided click the 'Non given' button next to customer reference and the system will automatically generate one for you.

Western Union Payments *(Check with accounts before offering to customers)*

On occasion, a customer may wish to pay via Western Union. Should this occur, add a line above the carriage line. Use reference 'Bank Charges', amend the description to 'Western Union Charge'. The charge is £15, add this to the 'Unit Price' box.

Note: The customer will need the full name, including any middle names, of the person who collects the payment; this would normally be Helen. Helen's full name is Helen Jean Lamb, please ensure the customer uses this when making their payment.


Additional Notes

If a PO has two or more lines of the same part number, the system will automatically group them together per sales value, for example an order for 2 x R-17MED plus 3 x R-17MED (chargeable) plus 1 x R-17MED (free of charge) will show on the invoice as 5 x R-17MED (chargeable) and 1 x R-17MED (free of charge).

For orders that are solely for calendars or posters, add notes to order processing page stating to ship with next order unless agreed by director.

Converting Proforma/Quotation to Order

Once payment has been received or quotation accepted with a purchase order being received, find the order on the 'Customer Sales Orders' page and click the details button. This will open the order processing page. Scroll down the page until you see the green buttons and click 'Convert to Order'. Check all information is correct and re-submit the order for checking.

DetailsConvert to Order

Deleting Orders



Should a quotation/proforma/order need to be deleted, please be aware these are not retrievable and would require re-entering should you delete it. At the top of the customer order page click the 'DELETE Order *****' button. Please enter the relevant reason for deletion and click 'Delete *****'. Once deleted you will need to start a new sales order.

Proof of Export

Proof of export can be added at any stage:

- Goods Out can upload shipping document
i.e. airway bills or proofs of collection
- From the customer or shipping company.

The CVM can have documents added even after it has been invoiced.

Customers who want EXW with companies we do not deal with often will need to send proof of export.

- UPS: We do not require this as we have an account from them.
- TNT / FEDEX: We have an airway bill and proof the driver has picked up.