VM3COP20.30 – UK Order Processing – Viamed

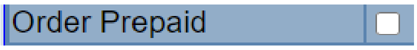
Things to remember:

- Every order NEEDS a hospital/company name, department (for hospitals), street name, town/city and postcode

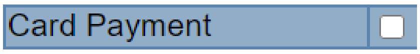
- Applicable memos typed in the notes section on the order processing screen.

- All NHS orders must have a purchase order number

- If pre-payment has been made, make sure you attach copy to 'Payment Notification if applicable' and click 'Order Prepaid'.



- Should the customer wish to pay for an order by Debit/Credit Card/Visa Card (we do NOT accept American Express) then you need to click the box next to 'Card Payment', this notifies Goods Out that payment needs to be taken before dispatching.



  If a card payment is required to be taken for a Proforma or Quotation, this box needs to be ticked and Goods Outs notified by Skype to process payment. Once payment is confirmed by Goods Out and the Proforma/Quotation can be turned into an order, the 'Order Prepaid' button needs to be ticked and notes added. The order should then be processed as per the following procedures.

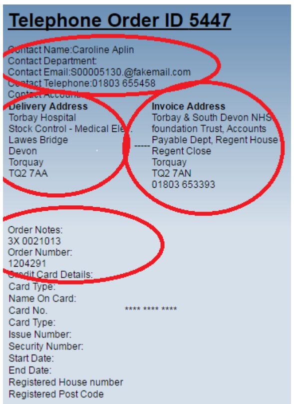
  See VM3.COP03.02 Filling In Credit cards slips, on how to complete the credit cards slips.

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.

E-procurement System Orders

When an order is sent to Viamed through an e-procurement system, an email will be received. Follow procedures VM3COP03.06 for Cardea, and VM3COP27.30 for Catalog360 Circle.

Telephone Orders

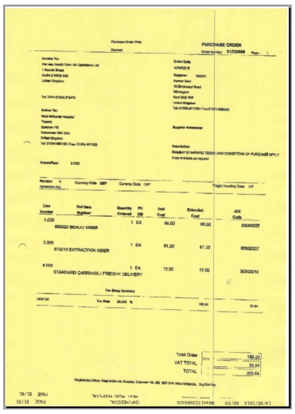

Telephone Order ID 5447
Contact Name:Caroline Aplin
Contact Department:
Contact Email:S00005130.@fakemail.com
Contact Telephone:01803 655458
Delivery Address
Torbay Hospital
Stock Control - Medical Ele
Lawes Bridge
Devon
Torquay
TQ2 7AA
Invoice Address
Torbay & South Devon NHS foundation Trust, Accounts 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

A telephone order will appear as shown to the left. The delivery and invoices 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.

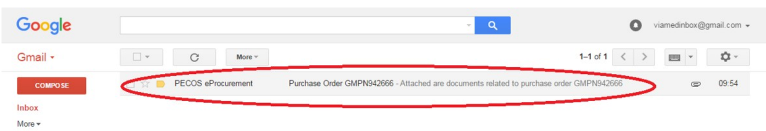
Fax Orders



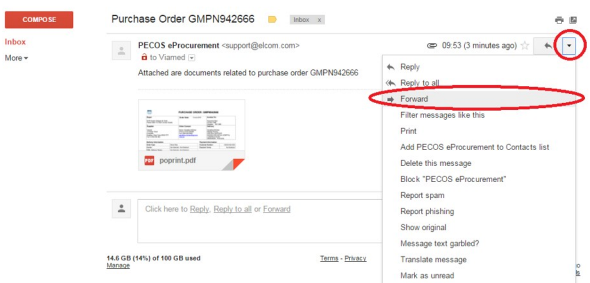
Orders which arrive via fax will appear the same way as an email PDF order and should be processed normally. They are sent to fax@viamed.co.uk

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.

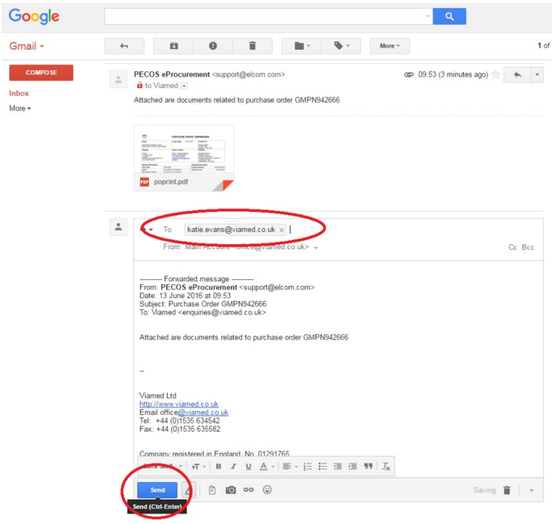
Email Orders



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

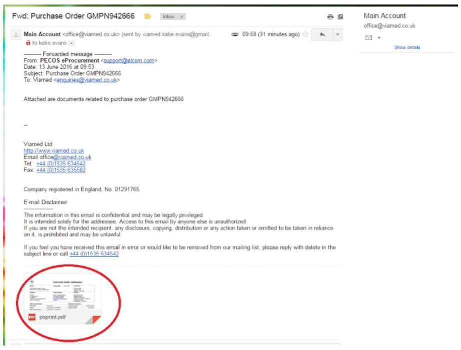


Click the arrow on the right and click forward.

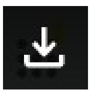


Type your vmsecure into the 'To:' field and click send. E.g. firstname.lastname@vmsecure.me.uk

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



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

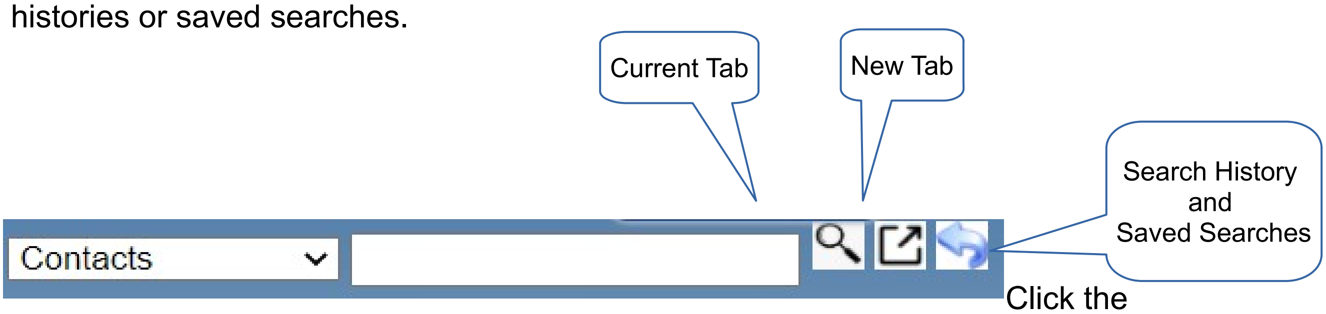


Click the download button at the top of the page and open to view contents. Please be aware of where this is downloaded to as you will need it later to upload to the order processing page.

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

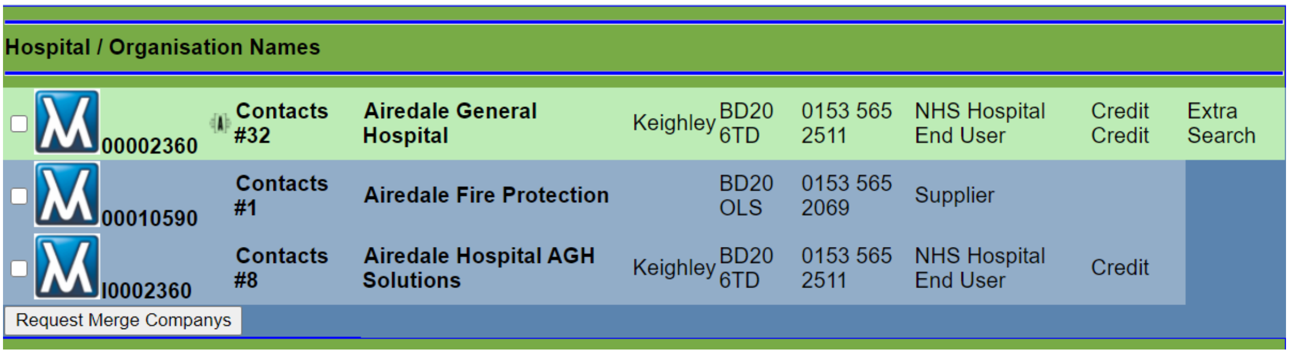
Order Processing

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 Airedale Hospital…



Hospital / Organisation Names									
00002360	Contacts #32	Airedale General Hospital	Keighley	BD20 6TD	0153 565 2511	NHS Hospital End User	Credit Credit	Extra Search
00010590	Contacts #1	Airedale Fire Protection		BD20 OLS	0153 565 2069	Supplier		
I0002360	Contacts #8	Airedale Hospital AGH Solutions	Keighley	BD20 6TD	0153 565 2511	NHS Hospital End User	Credit	

Request Merge Companys

This will open up a page similar to this:

Sales Order	Purchase Order	Contact	Department	Position	Direct Phone	Email
Viamed Add S.O.		No Name				
Viamed Add S.O.		Adele Brown		Procurement	0153 529 4515	adele.brown@anhst.nhs.uk
Viamed Add S.O.		Amy Rooke			0153 565 2511	amy.rooke@anhst.nhs.uk
Viamed Add S.O.		Amy Rooke	Supplies		0153 565 2511	Amy.Rooke@anhst.nhs.uk
Viamed Add S.O.		Andrew Barlow	Medical Engineering Dept.		0153 529 3417	andrew.barlow@anhst.nhs.uk

On the order PDF, find the contact name. 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)

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

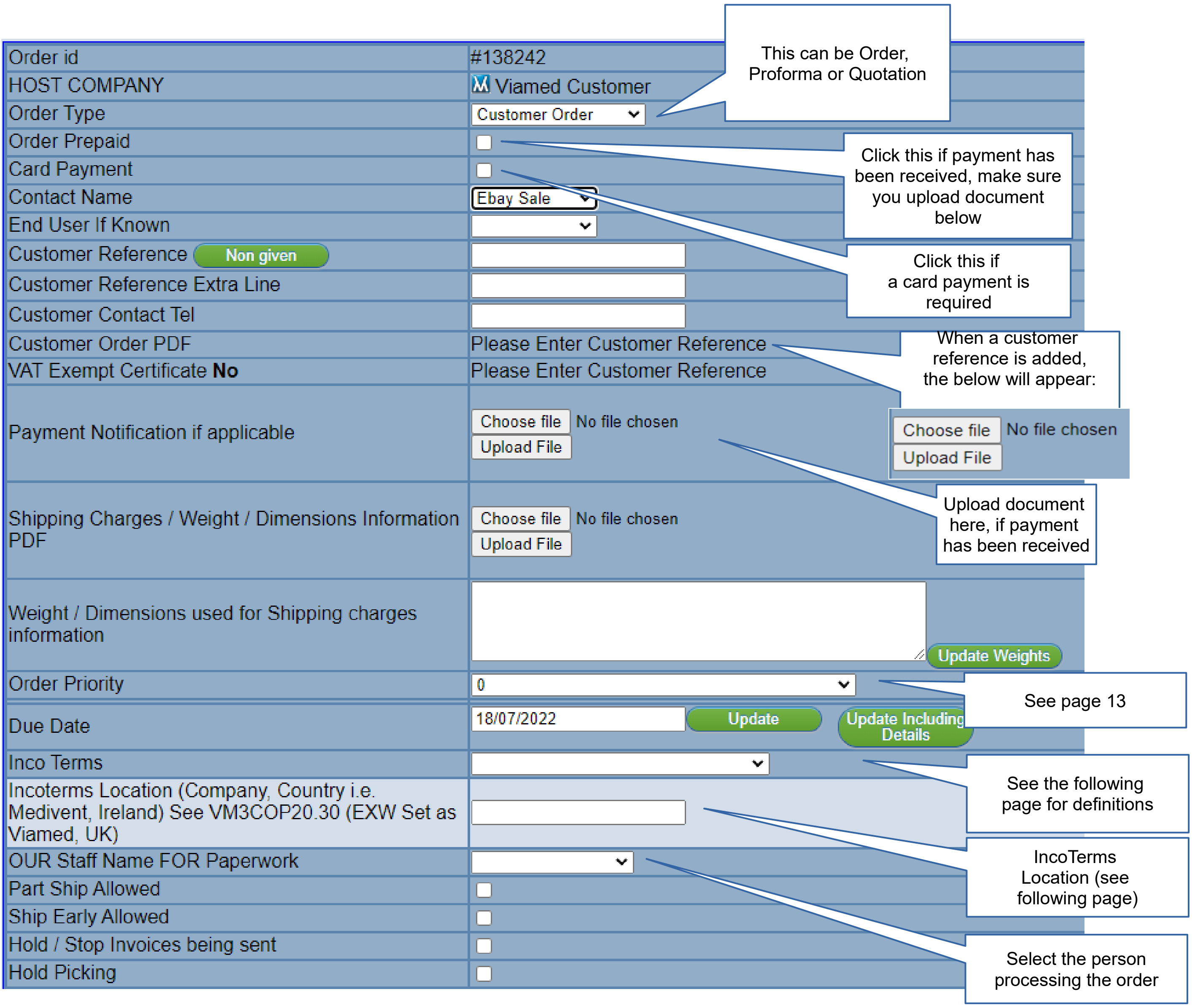
Viamed Account - Please Fill in the Following:

Main Details

Opera_Region	
Opera_Territory	
Opera_Cust_type	
Opera_Price List	0001
Opera I Account if applicable	
Vat Number	

0001 - UK GBP End User

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



Order id	#138242
HOST COMPANY	Viamed Customer
Order Type	Customer Order
Order Prepaid	
Card Payment	
Contact Name	Ebay Sale
End User If Known	
Customer Reference Non given	
Customer Reference Extra Line	
Customer Contact Tel	
Customer Order PDF	Please Enter Customer Reference
VAT Exempt Certificate **No**	Please Enter Customer Reference
Payment Notification if applicable	Choose file No file chosen Upload File
Shipping Charges / Weight / Dimensions Information PDF	Choose file No file chosen Upload File
Weight / Dimensions used for Shipping charges information	Update Weights
Order Priority	0
Due Date	18/07/2022 Update Update Including Details
Inco Terms	
Incoterms Location (Company, Country i.e. Medivent, Ireland) See VM3COP20.30 (EXW Set as Viamed, UK)	
OUR Staff Name FOR Paperwork	
Part Ship Allowed	
Ship Early Allowed	
Hold / Stop Invoices being sent	
Hold Picking	

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 is 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.

<u>EXW – Ex-Works</u>

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** *******

<u>CPT – Carriage Paid to</u>

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)**

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

<u>CIP – Carriage and Insurance Paid</u>

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. All UK end user customers (not distributors) are now CIP.

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

Note: Please make sure that if you change the Incoterms on an order, that you change any related field. For example, amending the carriage line to EXW, also requires the IncoTerms to be amended to EXW.

(See page 12 for 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

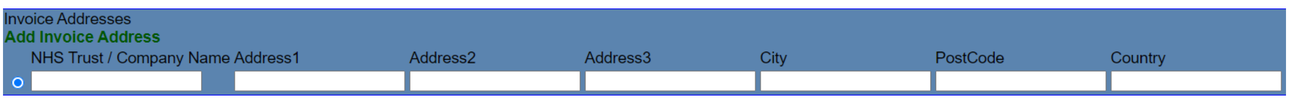
From the products ordered, establish which courier is suitable utilising the Customer Postage Pricing documents VM3COP03.011 and VM3COP20.34. If the customer would like to use their own courier, enter the 'Priority' as '2' and enter the 'Due' date as per cut-off times listed on the Customer Postage Pricing document VM3COP03.011 and VM3COP20.34.

This document also advises if the appropriate courier is UPS or Royal Mail for the most popular products; alternatively, check the Intrastats Stock page. Enter the appropriate 'Priority' code and 'Due' date as per cut-off times.

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

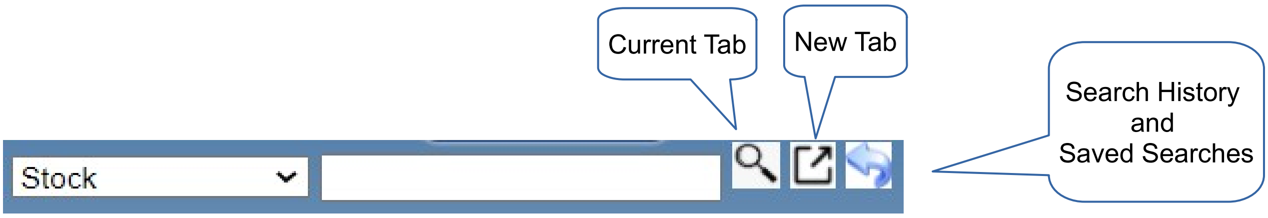
Invoice and Delivery Address
From the purchase order please select, using the white circle radio button to the left of the line, the correct invoice and delivery addresses from the list provided.

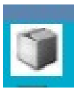
Should the relevant address not be included please click 'Add Invoice Address' or 'Add Delivery Address', this will refresh the page and provide you with fields to input.



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.

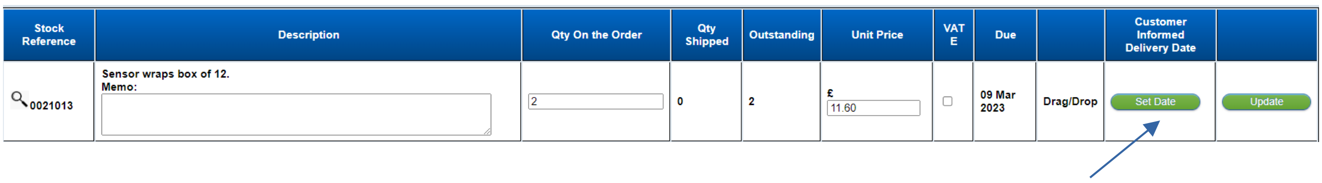
For distributor and automotive carriage charges, see VM3COP20.34

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.

Customer Informed Delivery Date

Should an item be out of stock, please make sure you confirm to the customer an estimated dispatch date, as per VM3COP20.302 Estimated dispatch dates.

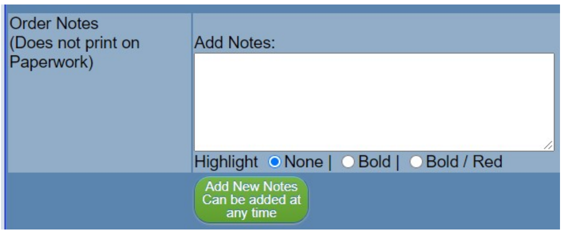


Stock Reference	Description	Qty On the Order	Qty Shipped	Outstanding	Unit Price	VAT E	Due		Customer Informed Delivery Date	
0021013	Sensor wraps box of 12. Memo:	2	0	2	£ 11.60		09 Mar 2023	Drag/Drop	Set Date	Update

This information needs to be logged against the customers order, open the order and on the stock line which is out of stock, “Set Date” to approx date you have told the customer. If you have provided e.g. 4-6 weeks lead time, please add the date of 6 weeks from the date of informing the customer.

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.

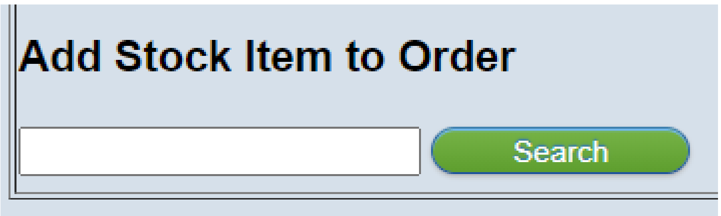


Note: ALL orders must be entered into IntraStats even if awaiting action so please continue adding the order by following this procedure but leave on a priority 8 until agreed with the customer to proceed. When taking an order off priority 8, please make sure you add notes so that the checker and goods out are aware this has been changed correctly.

Please be aware: Part shipments are only to be offered if complete lines items are in stock. See page 12 regarding insurance.

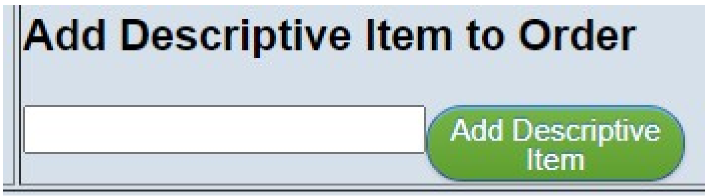
Should carriage be chargeable on an order, a revised order must be received from customer to show additional carriage (if they require carriage to be noted on orders).

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. When taking an order off priority 8, please make sure you add notes so that the checker and goods out are aware this has been changed correctly.

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

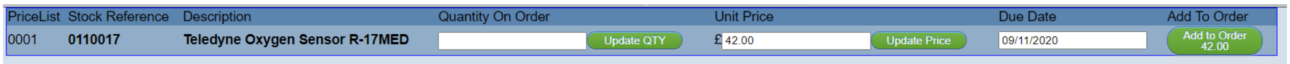


Should there be no part number, items can be added in the ‘Descriptive Item’ box.

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’.



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

Carriage Charges and Codes

To establish which courier to use, check the ‘UK Postage Pricing Guide’ document VM3COP03.011 and VM3COP20.34 for automotive and distributor postage pricing.

For example, for Royal Mail, enter ‘PPRD’ into the ‘Add Stock Item to Order’ box; for UK UPS, enter ‘PPUPS1’ into the ‘Add Stock Item to Order’ box.

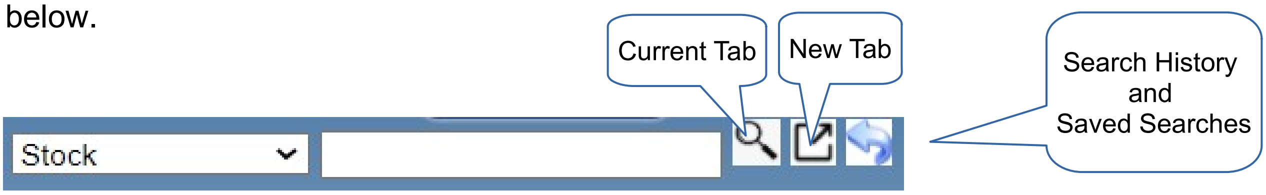
In some circumstances, customers may request express or special deliveries, refer to VM3COP03.01 to choose the correct reference number. Quantity should always be 1 unless advised otherwise by Goods Out.

Enter the required price into the ‘Unit Price’ box, leave blank if the order qualifies for free carriage, 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.

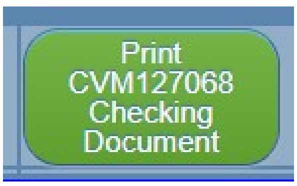
Stock Memos

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.

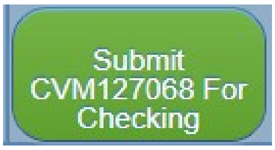
Should there be any errors click the back button on your browser and amend then repeat the step.

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.

<u>Insurance</u>

UK End User Customers (i.e. end user, or hospital) – Price List 0001

Customers are covered for all orders if sending to a customer using price list 0001. The cost of insurance is NOT passed to the customer. Orders up to the value of £2000 should be processed as CIP and any losses will be covered by Viamed. Orders with a value greater than £2000.01 should be processed as CIP and any losses will be covered by UPS.

Price List Code	Value £0 - £60.00	Value £60.01 - £2000.00	Value Greater than £2000.01
0001 UK End User	**CIP** No Insurance line on the order. Goods are covered automatically by UPS up to the value of £60.00	**CIP** No Insurance line on the order. Losses covered by Viamed.	**CIP** No Insurance line on the order. Insurance covered by Viamed but paid directly to UPS. This is added as a declared value to the UPS system by Goods Out.

UK Distributors Customers – Price List 0002

Customers are covered for all orders if sending to a customer using price list 0002. The cost of insurance is NOT passed to the customer. Orders up to the value of £2000 should be processed as CIP and any losses will be covered by Viamed. Orders with a value greater than £2000.01 should be processed as CIP and any losses will be covered by UPS.

Price List Code	Value £0 - £60.00	Value £60.01 - £2000.00	Value Greater than £2000.01
0002 UK Distributor	**CIP** No Insurance line on the order. Goods are covered automatically by UPS up to the value of £60.00	**CIP** No Insurance line on the order. Losses covered by Viamed.	**CIP** No Insurance line on the order. Insurance covered by Viamed but paid directly to UPS. This is added as a declared value to the UPS system by Goods Out.

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.

Credit Card Payments
If the customer is paying with a credit or debit card, add a BOLD/RED note on the order processing page for Goods Out to contact the customer. Should it be a different contact number than the one added previously, please add this also.

If you are processing a quotation or proforma which require prepayment, please ask Goods Out to process the payment so that you can turn it into an order. See page 12 for how to do this.

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

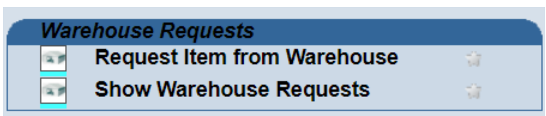
Outstanding Orders as of Mar 21 2022

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 Blender0-15 lpm flow meter	2		2	Add Watch
										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”.

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

If an order is VAT exempt, you will need to ensure you have acquired a VAT exemption certificate from the customer before proceeding. A new VAT exemption certificate is needed for each order. Process the order on IntraStats but ensure the priority is stated as ‘8’ until the certificate is received. Once received, pass to the accounts department to ensure it is valid and ask them to sign it off.

Once validated and signed off, upload the VAT certificate to the ‘VAT Exempt Certificate’ section at the top of the order processing screen. Once uploaded it will state ‘Yes’ next to the title.

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.

Carriage

If the order contains products that have both free and chargeable carriage, the carriage is free unless the courier service needs to be upgraded due to the chargeable items.

E.g. If a customer orders 1 box of flow sensors (free carriage), they would normally be sent free via Royal Mail (1 box only), but if they order an MySign O (chargeable carriage) which does not have free carriage and must be sent via UPS, the courier would need to be upgraded from Royal Mail to UPS and would be chargeable.

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.

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.