# Sending Sale or Return Orders

Beginning the Process

Print the Sale or return request if requested by email, if the request was verbal/telephone, add a telephone order and print as per VM3COP27.29. Gain authorization from a Director and their signature/date on the request paperwork.

From the Lookup/Magnifying Glass tab on Intrastats, Click on Contact and type the company name

Click the correct account
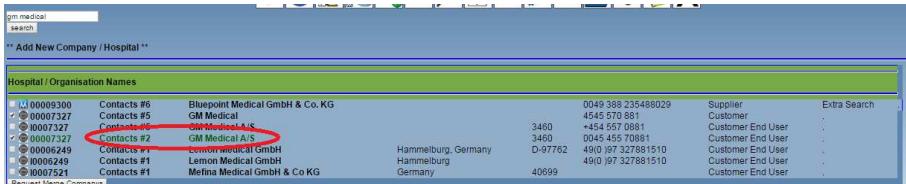
Click on the required name

Click on the Sale or Return icon

Click, "Add New Sale/Return'"

This will direct you to the main sale/return page and create a new record for the contact

Click ' Product Trial – Sale or Return Terms and Conditions

Click the PDF icon to open the file

When the file opens, click on the download icon located at the top-right of the screen
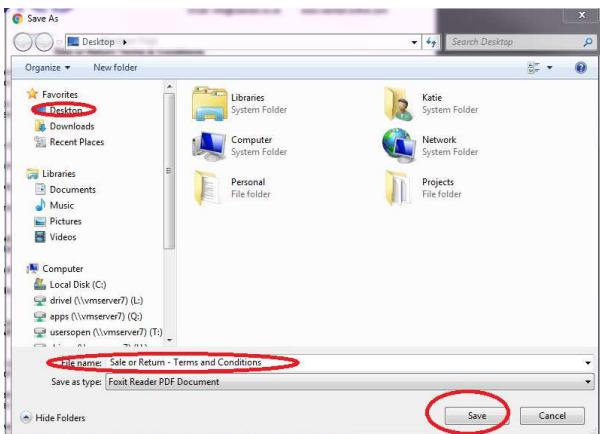
When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'
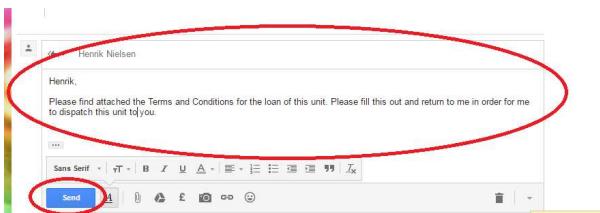
Return to the request email and reply to the customer to ask them to fill out the attached terms and condition and return them to you and click 'Send'

Requesting Stock Movement
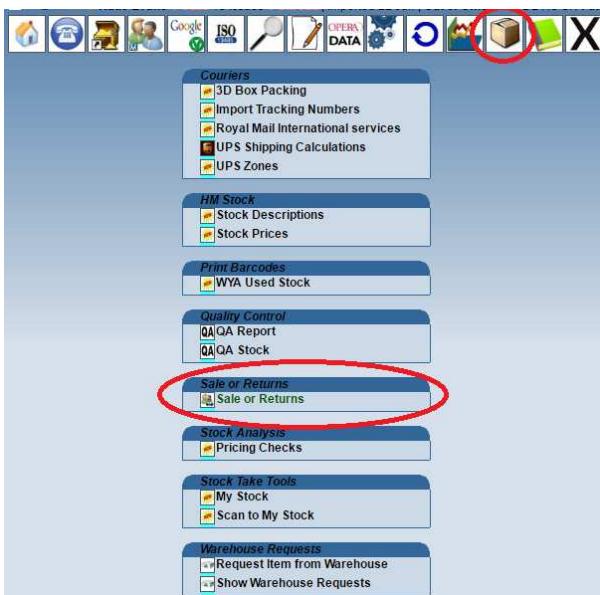
Return to Intrastats and click on the stock box icon. From this page, click on 'Sale or Returns'

On this page, scroll to the bottom and click "Request new stock item to be scanned to Sale or Return".

Fill in the issue detailing the part number(s) and quantity required. Request can also be made via Intrastats Warehouse Requests. Issue this to the person in Goods Out, fill in the Opera A/c number and click "Add Issue"

Print out the issue and place in the picking tray in Goods Out. Note: if the item is urgent, also inform Goods Out verbally.

When Terms and Conditions are Signed / Generating Quote

When you have receive 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 an Opera 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.

In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested ensuring any quotes for over £/$/€1000 are signed off by a director.

Use the SOR number as the 'Cust Ref'
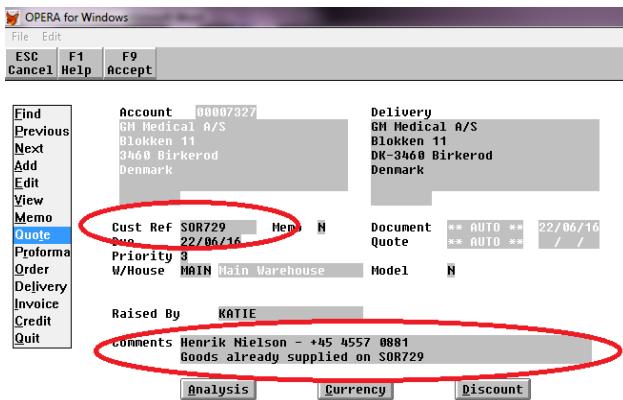
Also, in the comments section beneath the name and telephone number of the customer, state "Goods already supplied on SOR***"

Print 2 copies of the quote. 1 is to be sent to the customer, any the other needs to be filed with the SOR paperwork.

From GoldMine, using the Lookup function, locate the customer and click on the 'Write' button
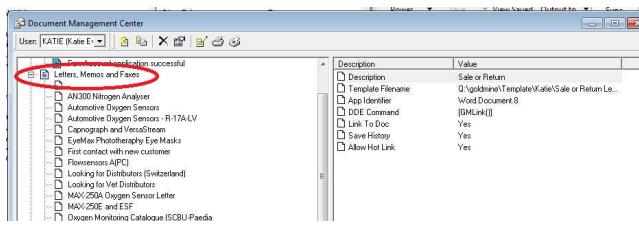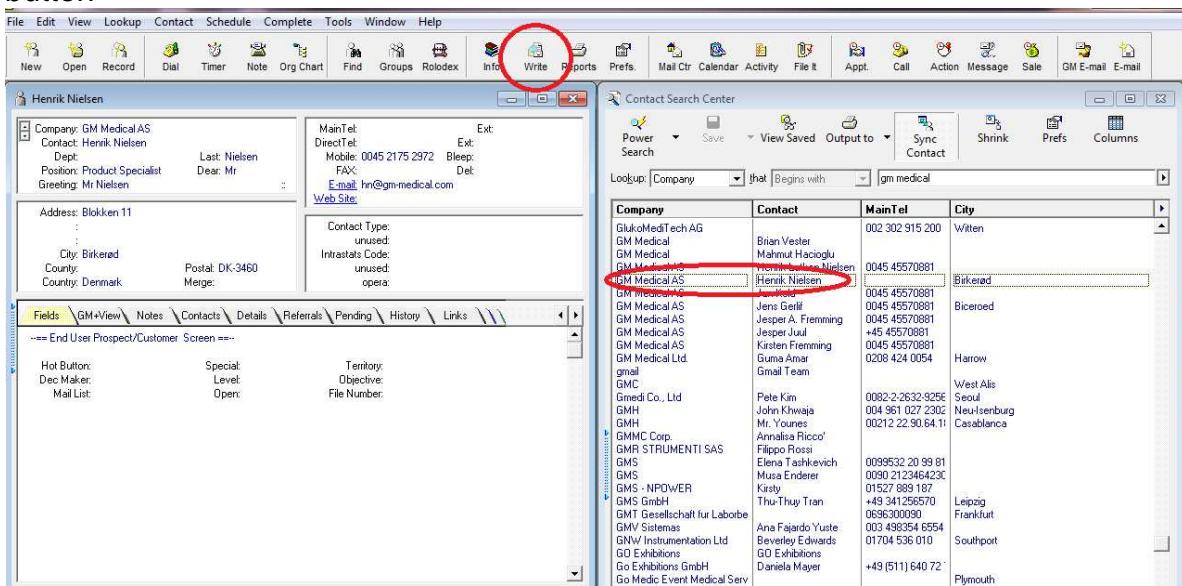
Click on 'Letters, Memos and Faxes' to view the list beneath and double-click the letter named 'Sale or Return'. If this letter cannot be found, speak with the marketing department and request that they add it for you.

Mr Henrik Nielsen
Product Specialist
GM Medical AS
Blokken 11
Birkerød, 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

Katie Evans
Office Administrator

When the letter opens, amend all the details as shown, to include the product description, part numbers and serial number.
When complete, read through the letter and ensure the grammar is correct, ie. If

there is more than one item, the words, "This product is" may need to be changed to, "These products are" and removing the word, "Trust" if not for the NHS.

When complete, print one copy of this letter on letterhead and save to the U drive>current year>current month with the following format: Sale or Return - *customer name* - SOR*** - *date backwards* e.g. "Sale or Return – GM Medical – SOR729 – 160622"
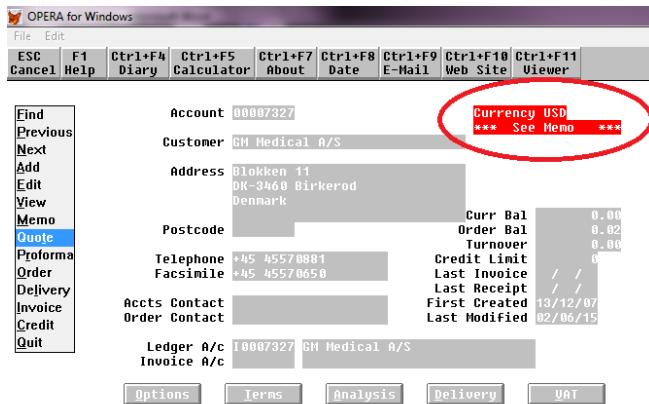
Print a colour price list in the correct currency as found on Opera.
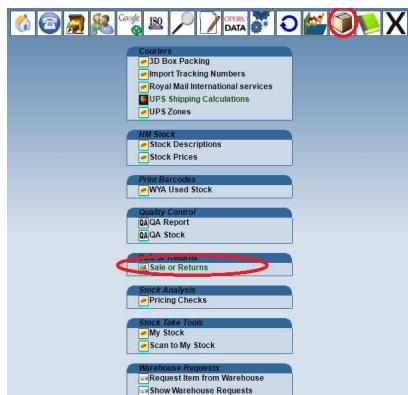
Return to the main SOR page located in Intrastats>Stock icon>"Sale or Returns"

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

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

concentration of oxygen".

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

In the drop-down box next to the "Submit" button, select "Loan", then click "Submit".

Return to the main Sale Or Return screen and click the appropriate flag icon for the customer to generate an NHS Delivery Note depending upon the location of the customer (England, Wales and Northern Ireland use the same form, Scotland has

its own) or export for non-UK customers.

Save the PDF to U drive>Current year>Current month in the following format:

"SOR Shipping Invoice - *Customer Name* - SOR*** - date backwards"
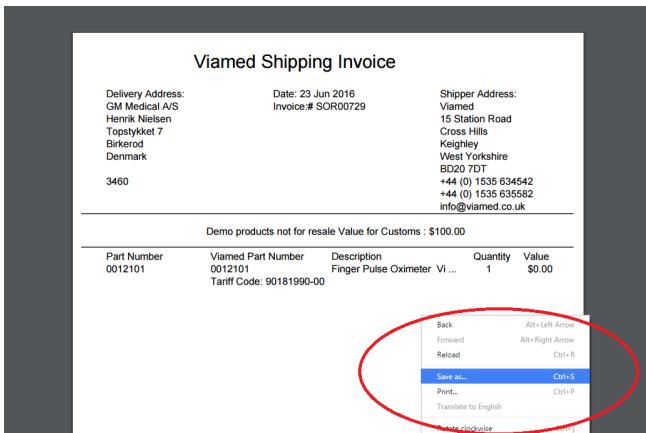
Print the delivery note and print a second copy of the first page, if the SOR is for a UK customer, strike through the "Form of Indemnity B" section and ask a director or sales manager to sign the "Form of Indemnity A" to ensure that ownership of the unit does not pass to the customer.

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

Click on the PDF icon

This will open the feedback form; print one copy of this, as it will be sent with the goods to allow the customer to offer feedback.

The Paperwork

Gather all paperwork and secure with a paperclip, place in the checking tray.

When checked, staple the request paperwork with director's signature and a copy of the quote to a copy of the first page of the SOR delivery note and place them in the Samples/SOR file located in the office.

Print the signed Terms and Conditions and staple to the second copy of the quote. File them in the SOR Terms and Conditions file.

Take one copy **Opera quotation, letter, signed NHS Delivery Note (or unsigned delivery note for export customers) , feedback form, and price list** to Goods Out and advise them which leaflet is required.

The sender needs to schedule him or herself a follow up to discuss the product, obtain feedback and determine if the customer intends to purchase or return to us.

If following up by email, please direct the customer to the online feedback form: http://www.viamed.co.uk/trial-feedback
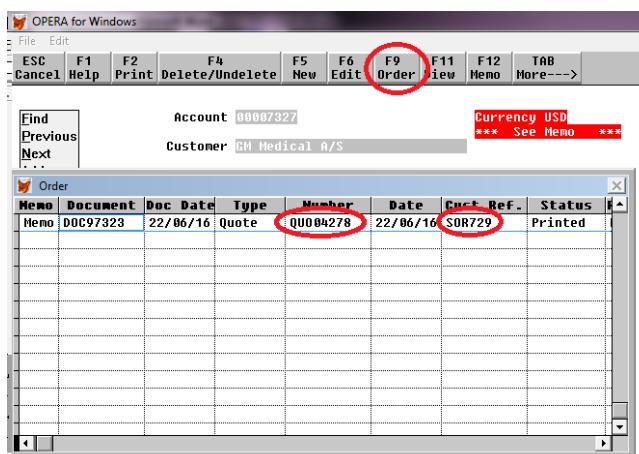
SOR Purchase

If the customer chooses to purchase the SOR items, retrieve the SOR paperwork from the SOR file.

Locate the account on Opera and press 'O' to open the orders menu.

Click on the correct quote and press F9 to convert the quote to an order.

When asked if you would like to edit, click yes.

Amend the 'Cust Ref' box to the purchase order number (if supplied) and change the 'Due' date to the next available shipping day.

Press F9 twice to complete the order.

Print 2 copies and highlight the note at the bottom stating, "Goods already supplied on SOR***". Place all of the paperwork in the checking tray. Once checked, take the unticked copy of the ORD to Goods Out as per VM3COP20.05 order processing procedure. Goods Out will then invoice the order.
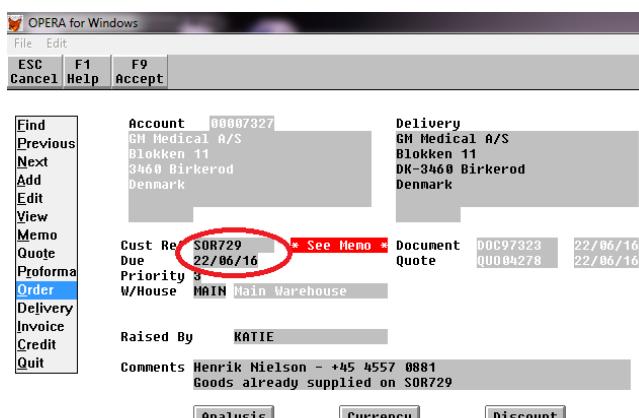
SOR Return
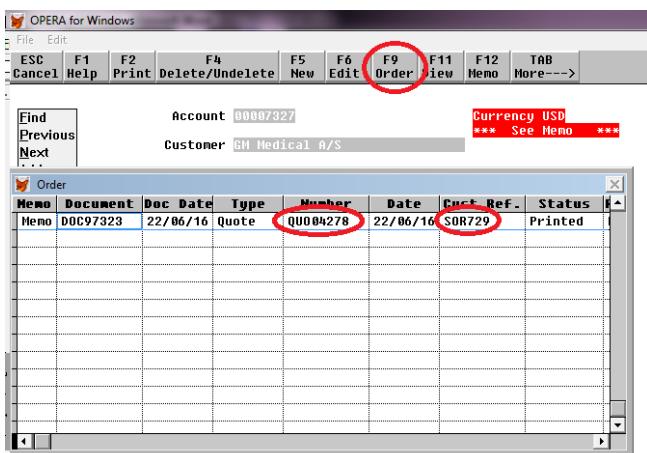
If the customer chooses to return the SOR items, issue the customer with a returns reference number (SRS) as per VM3COP20.03 Repair Intrastats Procedure. When the item is received by Goods In, you will receive an issue.

When this issue is received, delete the quote from Opera. Locate the account and correct quote on Opera.
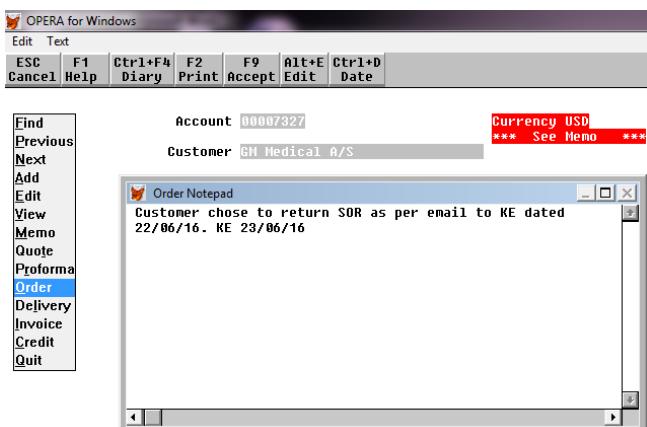
Press F12 and write a memo to say that the customer did not want to purchase the goods and has returned them on SRS*****. Initial and date the memo and press F9 to confirm

On the next screen, you will see the quote again, press F4 to delete, and click yes when asked to confirm.

Staple all of the SOR paperwork and confirmation of return together and place in the Miscellaneous file as per VM3COP20.28