

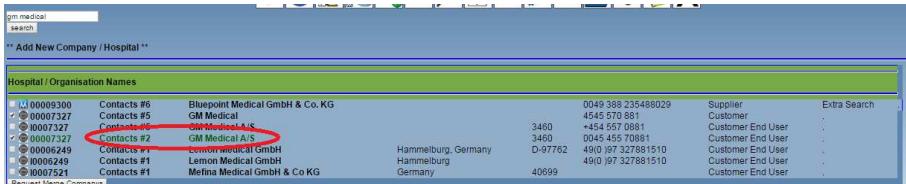
VM3COP20.13 Sending Sale or Return Orders

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.

Click the correct account



Click on the required name



Click on the Sale or Return icon



Click, "Add New Sale/Return"

CID 6382 GM Medical A/S. Henrik Nielsen ID 12875

Topstykket 7
Birkeroed
Denmark
3460
Denmark
Tel: 0045 45570981
Opera: 0000732/
Type: Customer End User
Invoice Address/Account: 10007327

Henrik Nielsen
Direct Tel: 45 4557 0881
Goldmine ?

Company Options Contact Options

Sale or Returns
Add New 'Sale / Return'

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

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 | | | | | | | |
|--|----------|-------------|------------------------------------|-----|----------------|------|--|
| SCR | Account | Created | Name | Add | Shipping Notes | Send | |
| SCR628 | 00002360 | 01/Dec/2014 | Airedale General Hospital | | | | |
| SCR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital | | | | |
| SCR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital | | | | |
| SCR705 | 00007995 | 30/Mar/2016 | Cortessis Medical (Euro) | | | | |
| SCR728 | 00001900 | 17/Jun/2016 | Gloucestershire Royal Hospital | | | | |
| SCR729 | 00007327 | 22/Jun/2016 | GM Medical A/S | | | | |
| SCR717 | 00007374 | 03/May/2016 | Viamed Ltd (Euro) | | | | |
| SCR681 | 00005172 | 11/Nov/2015 | Princess Royal University Hospital | | | | |
| SCR722 | 00012966 | 27/May/2016 | Prinny Hospital Chelmsford | | | | |
| SCR627 | 00000590 | 24/Nov/2014 | Royal Bolton Hospital | | | | |
| SCR671 | 00003220 | 19/Aug/2015 | Royal Free Hospital | | | | |
| SCR692 | 00000009 | 26/Feb/2016 | Staff Purchasing account | | | | |
| SCR693 | 00000009 | 29/Feb/2016 | Staff Purchasing account - KE | | | | |
| SCR724 | 00004890 | 16/Jun/2016 | Stepping Hill Hospital | | | | |
| SCR674 | 00002130 | 08/Sep/2015 | University Hosp of Hartlepool | | | | |
| SCR718 | 00000002 | 09/May/2016 | Viamed Ltd | | | | |
| SCR720 | 00000002 | 23/May/2016 | Viamed Ltd | | | | |
| SCR725 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | | |
| SCR726 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | | |
| SCR727 | 00003450 | 16/Jun/2016 | Whipps Cross University Hospital | | | | |

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

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

Click the PDF icon to open the file

Search inside document text if possible

Product Trial - Sale or Return Terms and Conditions

Company ISO Manual Files Index

| Document ID | Type | Description | More | Usage | Added | Expires |
|-------------|-------------------------|---|---------|--------------|-------------|---------|
| 6811 | Miscellaneous Documents | Product Trial - Sale or Return Terms and Conditions | Details | Unrestricted | 19 Feb 2010 | |

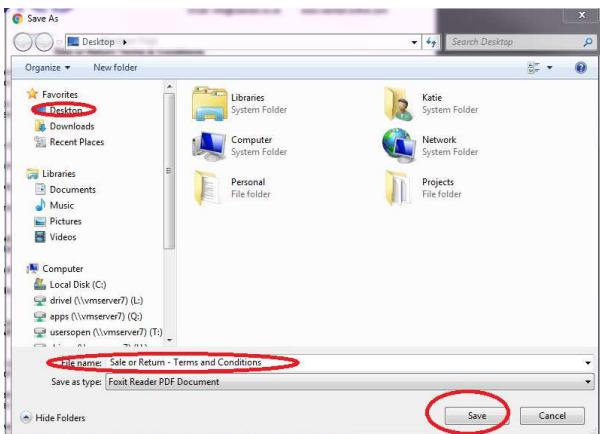
When the file opens, click on the download icon located at the top-right of the screen

6811.pdf 1 / 1

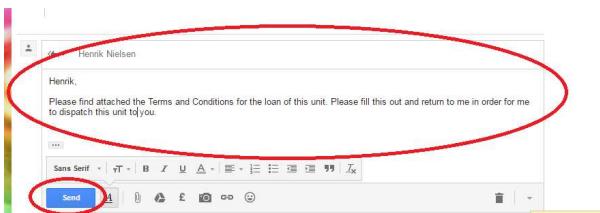
VIAMED

Product Trial
Sale or Return Terms & Conditions

Viamed Limited 15 Station Road - Cross Hills
Keighley - West Yorkshire BD20 7DT - United Kingdom
Tel: +44 (0)1535 634542 Fax: +44 (0)1535 635582
Email: info@viamed.co.uk www.viamed-online.com

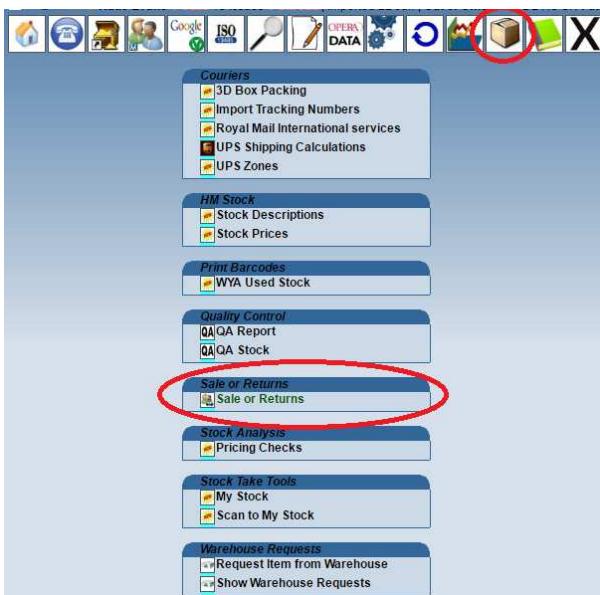


When the Save window opens, click 'Desktop', change the 'File name' to: "Sale or Return - Terms and Conditions" and click 'Save'



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 Instratats and click on the stock box icon. From this page, click on 'Sale or Returns'

| Barcode | Serialnumber | Stock_Ref | Description |
|---------|------------------|-----------|--------------------------------|
| 008196 | E0103499 | 0014838 | Pulse Oximetry Wrap Sensor |
| 006288 | Tracking1 | 0034993 | Disposable SpO2 Sensor - Adult |
| 005297 | Tracking10 | 0034993 | Disposable SpO2 Sensor - Adult |
| 005298 | Tracking11 | 0034993 | Disposable SpO2 Sensor - Adult |
| 006299 | Tracking12 | 0034993 | Disposable SpO2 Sensor - Adult |
| 006300 | Tracking13 | 0034993 | Disposable SpO2 Sensor - Adult |
| 005401 | Tracking14 | 0034993 | Disposable SpO2 Sensor - Adult |
| 000397 | Tracking20 | 3210070 | Silicone Face Mask, Size 0 |
| 000423 | Tracking29 | 3210070 | Silicone Face Mask, Size 0 |
| 000424 | Tracking30 | 3210070 | Silicone Face Mask, Size 0 |
| 000425 | Tracking33 | 3210070 | Silicone Face Mask, Size 0 |
| 000436 | 90730145 | 4410500 | Capnograph VM 2500-M |
| 005552 | Tracking754433_0 | 4420512 | |

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.

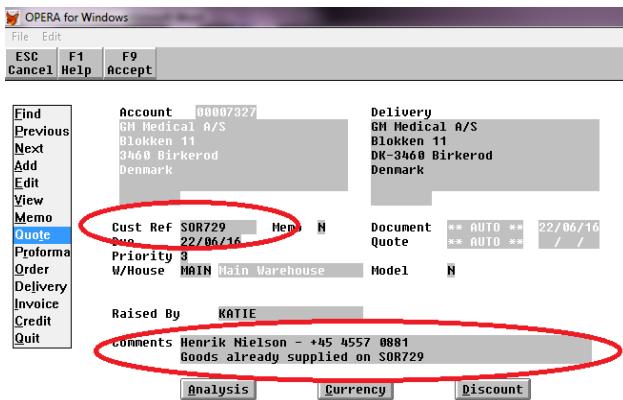
When Terms and Conditions are Signed / Generating Quote

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.

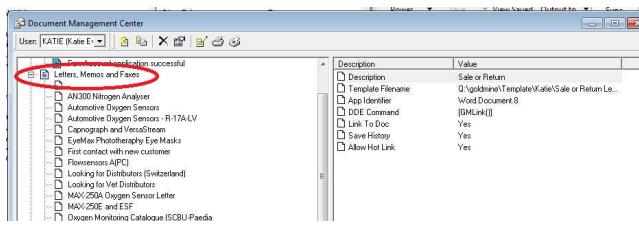
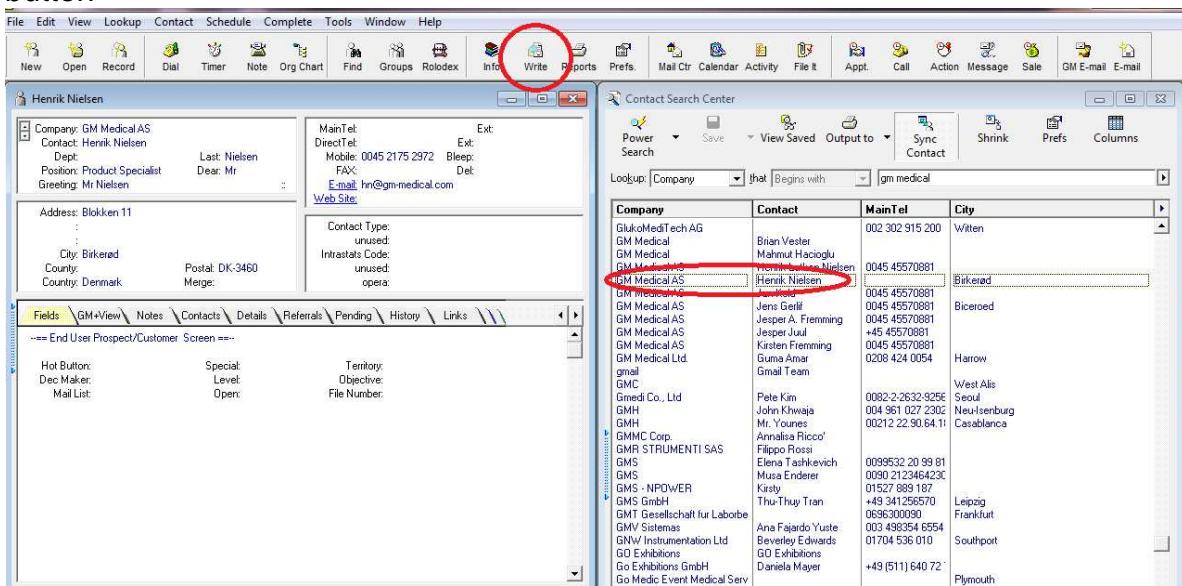
Use the SOR number as the ‘Cust Ref’



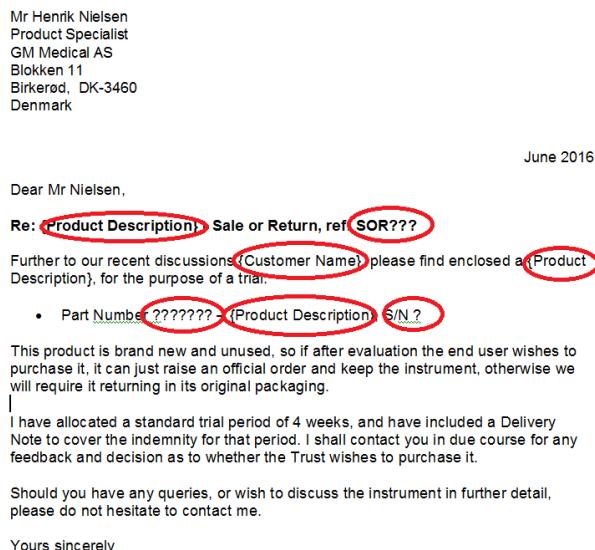
Also, in the comments section beneath the name and telephone number of the customer, state "Goods already supplied on SOR***"

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.



When the letter opens, amend all the details as shown, to include the product description, part numbers and serial number.

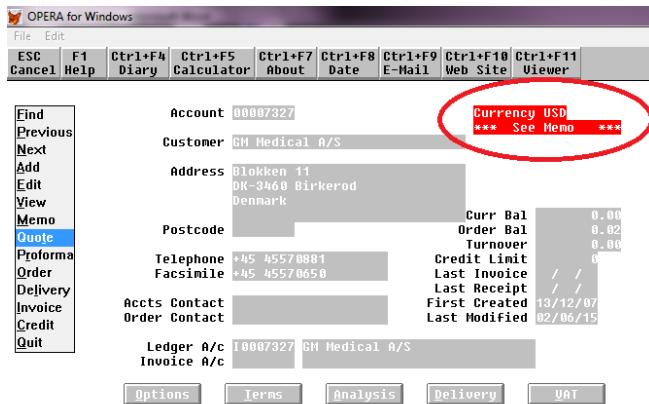
When complete, read through the letter and ensure the grammar is correct, ie. If

Should you have any queries, or wish to discuss the instrument in further detail, please do not hesitate to contact me.

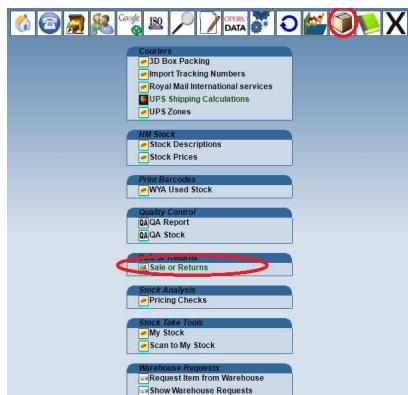
Yours sincerely

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"

| 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 | Account | Created | Name | Add | Shipping Notes |
| SOR629 | 00002380 | 01Dec/2014 | Airedale General Hospital | | |
| SOR682 | 00002380 | 03Dec/2015 | Airedale General Hospital | | |
| SOR642 | 00000490 | 23Feb/2015 | Birmingham Heartlands Hospital | | |
| SOR705 | 00007995 | 30Mar/2016 | Confidence Medical (Euro) | | |
| SOR729 | 00001680 | 17Jun/2016 | Derby Royal Hospital | | |
| SOR729 | 00007327 | 22Jun/2016 | GM Medical A/S | | |
| SOR717 | 00007374 | 03May/2016 | Medivent Ltd (Euro) | | |
| Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there) | | | | | |
| Company | GM Medical A/S | | | | |
| Contact | Henrik Nielsen | | | | |
| Department | | | | | |
| Address | Topstykket 7 Birkeroed Denmark | | | | |
| PostCode | 3460 | | | | |
| Barcode Purpose of Device The trial/testing to be undertaken by the authority (if any) | | | | | |
| 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 (ID708186) 0014750 SpO2 Silicone Sensor - Adult EDM00372 (ID711777) 0012160 Pulse Oximeter VM 2100 T81000185 (ID842231) 0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID866238) 0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID866238) 0034993 Disposable SpO2 Sensor - Adult Tracking1 (ID866238) 0034993 Disposable SpO2 Sensor - Adult Tracking11 (ID866238) 0034993 Disposable SpO2 Sensor - Adult Tracking12 (ID866239) 0034993 Disposable SpO2 Sensor - Adult Tracking13 (ID866300) 0034993 Disposable SpO2 Sensor - Adult Tracking14 (ID866301) 2810000 MD0000257 Yellow 1540n2500081 (ID924098) 0012101 Pulse Oximeter VM 2101 90000125 (ID859730) 4330002 SpiroTrue A/PC Tracking3 (ID970101) 4330002 SpiroTrue A/PC Tracking4 (ID978162) | | | | | |

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".

Destination: (Updates only affect SOR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

| | |
|------------|--------------------------------------|
| Company | GM Medical A/S |
| Contact | Henrik Nielsen |
| Department | |
| Address | Topstykket 7 Birkeroed Denmark |
| PostCode | 3460 |
| Update | |

0012101 Pulse Oximeter VM 2101 908900125 (ID959730)

Finger Pulse Oximeter

Sale or Return trial to determine suitability prior to purchase

Loan

Current Items on Sale Return id #729
Print/Picking List
Stock Ref/Serial number/Barcode/Description/Type

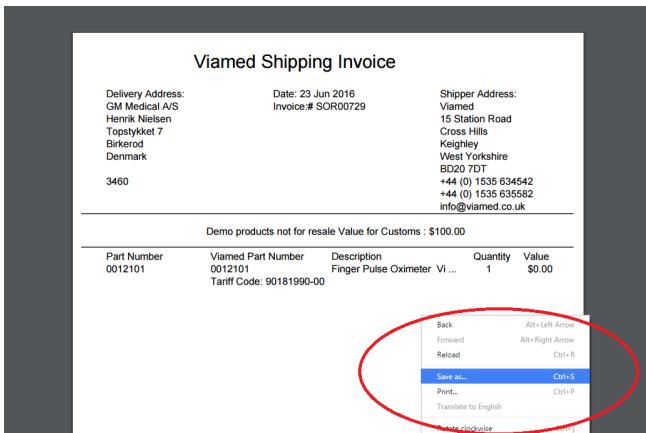
Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please Send with all sale or return goods the
Product Trial - Sale or Return Terms and Conditions
Viamed Product Trial Feedback Form

late Returns Not Sent/ In Preparation

| SOR | Account | Created | Name | Add | Shipping Notes | Send |
|--------|----------|-------------|--------------------------------|---------------------------------|---------------------------------|---------------------------------|
| SOR720 | 00002360 | 23/Jul/2015 | 70 Birkenhead Road | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR628 | 00002360 | 01/Sep/2014 | Airedale General Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR705 | 00007995 | 30/Mar/2016 | Corlessis Medical (Euro) | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR728 | 00001900 | 17/Jun/2016 | Gloucestershire Royal Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR729 | 00007227 | 22/Jun/2016 | GM Medical A/S | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR717 | 00007374 | 08/May/2016 | Medivent Ltd (Euro) | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |

its own) or export for non-UK customers.



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.

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](#)

late Returns Not Sent/ In Preparation

| SOR | Account | Created | Name | Add | Shipping Notes | Send |
|--------|----------|-------------|------------------------------------|---------------------------------|---------------------------------|---------------------------------|
| SOR628 | 00002360 | 01/Sep/2014 | Airedale General Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR682 | 00002360 | 03/Dec/2015 | Airedale General Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR723 | 00007358 | 31/May/2016 | Aspa A.S | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR642 | 00000490 | 23/Feb/2015 | Birmingham Heartlands Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR705 | 00007995 | 30/Mar/2016 | Corlessis Medical (Euro) | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR717 | 00007374 | 03/May/2016 | Medivent Ltd (Euro) | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR681 | 00005172 | 11/Nov/2015 | Princess Royal University Hospital | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |
| SOR722 | 00012965 | 27/May/2016 | Priory Hospital Chelmsford | <input type="button" value=""/> | <input type="button" value=""/> | <input type="button" value=""/> |

Search inside document text if possible

Viamed Product Trial Feedback Form

Company ISO Manual Files Index

| Document ID | Type | Description | More | Usage | Added | Expires |
|-------------|-------------------------|------------------------------------|---------|----------------------------------|-------------|---------|
| 16508 | Miscellaneous Documents | Viamed Product Trial Feedback Form | Details | Not Set Assume Internal Use ONLY | 18 Mar 2016 | |

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.

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

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

"SOR Shipping Invoice - *Customer Name* - SOR*** - date backwards"

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

Click on the PDF icon

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.

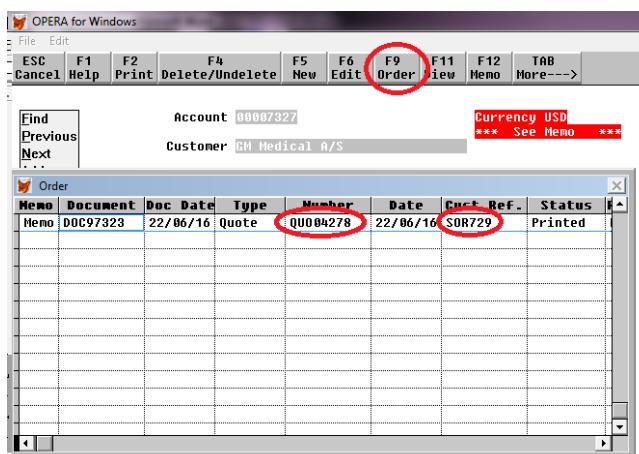
Print the signed Terms and Conditions and staple to the second copy of the quote. File them in the SOR Terms and Conditions file.

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.

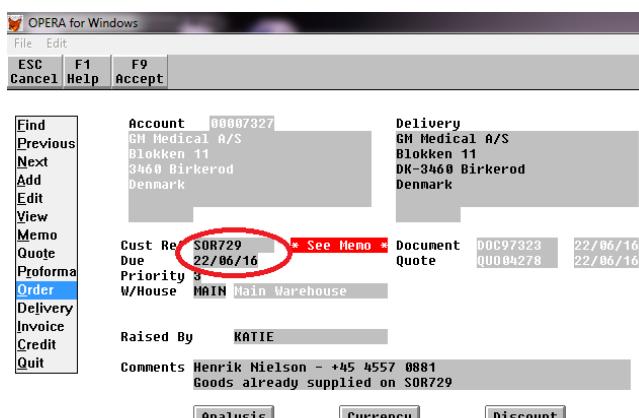
When asked if you would like to edit, click yes.

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

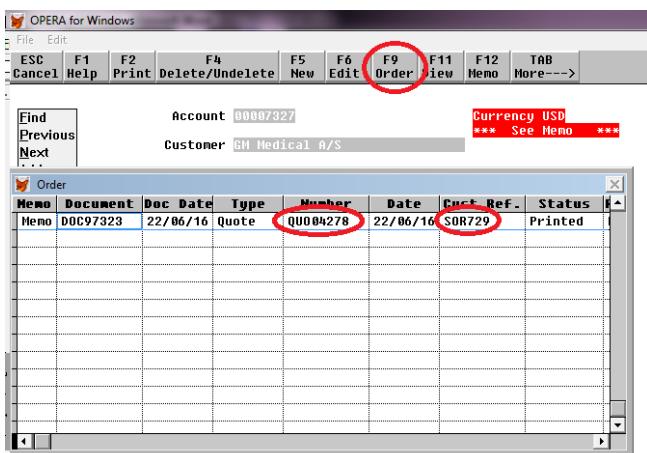
Press F9 twice to complete the order.

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.

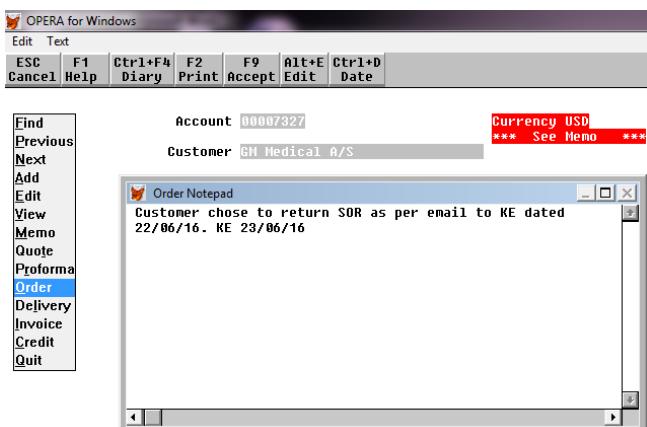


SOR Return



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