

## Order Checking

Collect an order from 'Tray 4 – Sales Orders – Checking' in the office; there should be a minimum of a purchase order (PO) and 2 copies of the ORD plus any communication as applicable.

ORD

Invoice Address

Medicoline ApS  
Vaerkstedsvej 24 B  
Koege  
Denmark  
VAT No: DK33046960  
DK-4600

00006353

Locate the account number on the ORD and locate the account on Opera.

ESC F1 Ctrl+F4 Ctrl+F5 Ctrl+F7 Ctrl+F8 Ctrl+F9 Ctrl+F10 Ctrl+F11  
Cancel Help Diary Calculator About Date E-Mail Web Site Viewer

Find  
Previous  
Next  
Add  
Edit  
Memo  
Delete  
Proforma  
Order  
Delivery  
Invoice  
Credit  
Quit

Account 00006353 Currency EUR  
Customer Medicoline ApS \*\*\* See Memo \*\*\*  
Address Vaerkstedsvej 24 B  
Koege  
Denmark  
VAT No: DK33046960  
Postcode 24-4600  
Telephone  
Facsimile  
Accts Contact  
Order Contact  
Ledger A/c  
Invoice A/c

Curr Bal 0.00  
Order Bal 0.00  
Turnover 0.00  
Credit Limit  
Last Invoice  
Last Receipt  
First Created 23/05/10  
Last Modified 08/08/10

Options Items Analysis Delivery OK

Click on 'Memo', read the memos and ensure that the ORD meets any noted requirements.

Take 1 copy of the ORD and the PO. Compare the invoice address on the ORD to the PO, tick each line on one copy of the ORD to confirm it is correct. Repeat this for the delivery address.

Check the order number on the PO against the 'Cust Ref' on the ORD and tick the ORD if correct.

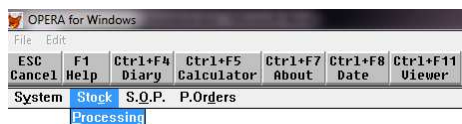
Check each line against the PO, check part number, description, quantity and price are correct and tick if so.

For export orders purchasing in USD, ensure there is a bank charge of \$25 (if there are no instructions on the memo requesting different charges). If there is a PayPal charge in place of a bank charge, ensure the charge totals 6% of the total value of the products, insurance and carriage (total order minus bank charges).

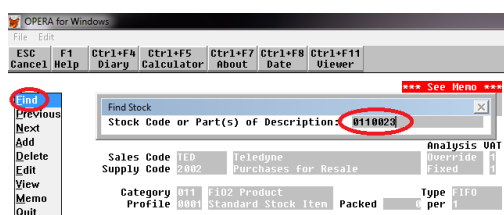
For orders outside of the UK (England, Wales, Scotland and Northern Ireland) ensure there is an Insurance line (INS), the total insurance should be 1% of the total cost of the goods (not including bank, insurance or carriage charges). This should always be included unless memo states otherwise. Check the price and tick if correct.

Carriage on export orders may have a different UPS service such as 'Express' or 'Express Saver'. If the order states a specific service, there should be a print out attached to the checking paperwork with a box size and prices. Ensure the box size noted matches the one printed with the prices and tick if correct.

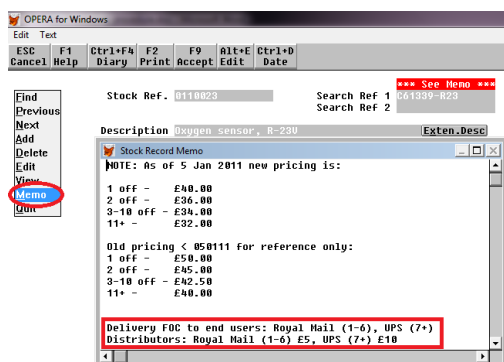
Check the carriage line for the correct courier as per the items listed, referring to the Customer Postage Pricing COP (Doc ID: 16501) and Intrastats/Opera stock page, as necessary. Ensure the correct delivery option has been determined, ie. Royal Mail/UPS. If details for reference cannot be found, consult with colleagues or confirm courier/pricing with Goods Out then tick the ORD if correct.



To check an Opera memo, from the menu page in Opera, click 'Stock' and click 'Processing'.



Click 'Find' and type the part number you require further information on, press the 'Enter' key.



Click 'Memo' and you will be presented with additional information regarding the product. Locate carriage information and add this information to the order accordingly.

Ensure the priority is correct as per the courier and service used as per the Order Processing Priorities COP (Doc ID: 16350) and tick the ORD if correct.

When the priority is correct, check the date due against current cut-off times as found on Order Processing Priorities COP (Doc ID: 16350).

Orders must be scanned in and ORD's taken to Goods Out before cut-off times for the order to be shipped the same day. If the time is later than the cut-off time, the due date needs to be the next working day.

Priority 1 – check with Goods Out for possible shipping date

Priority 2 – cut-off time: 11:00am

Priority 3 – cut-off time: 13:00pm

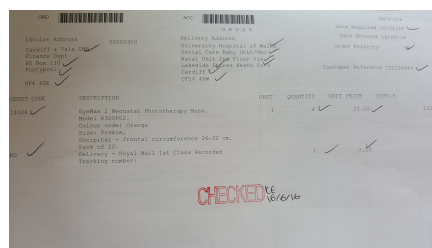
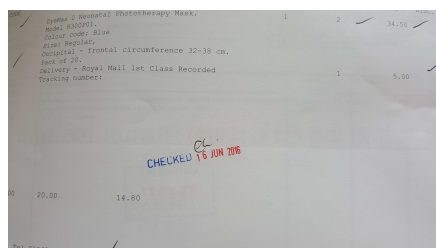
Priority 4 – cut-off time: 15:30pm

Tick the date due on the ORD if correct.

If any details are incorrect, circle them as you work through it. After checking the entire ORD, return all of the paperwork to the person who added the order to enable them to amend any necessary details; this then needs to be re-checked.

When you are satisfied that the ORD is correct, set the unticked copy of the ORD to one side and staple the remainder of the paperwork (ticked ORD, PO and any communication) in the top-left corner close to the ORD barcode.

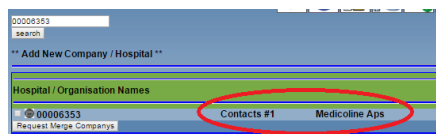
Stamp the stapled copy with 'checked' initial and date next to the stamp.



Using Intrastats, navigate to the magnifying glass and click in the 'Contacts' field.



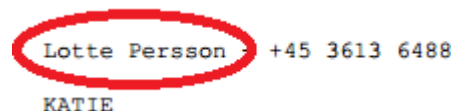
Using your barcode scanner, scan the 'ACC' barcode located at the top-centre of the ORD. This will enter the account number and proceed automatically to the next screen. If you do not have access to a barcode scanner, type the account number (e.g. 00006353) into this box and hit enter.



Click on the company name.



Select the contact name as seen on the bottom-left of the ORD. If the name is not showing on Intrastats, refer to CM3COP20.081 (Doc ID14215) on how to add contacts into contact management.



N.B. If the contact does not have an email address linked, check the paperwork thoroughly for an email address.

Contact	Department	Position	Direct Phone	Email
Andrew Barnes	Medical Physics Department	Medical Physics Technician	0141 211 6827	
Billy Campell			0147 550 4560	
Christina Coulter				
Colin Cowan	Medical Physics Department	Practitioner Clinical Technologist		colin.cowan@ggc.scot.nhs.uk
David Ness	Medical Physics Department			
Geraldine McIntee			0147 550 4560	Geraldine.McIntee@ggc.scot.nhs.uk
Paul McDonald	Medical Engineering	Technician	0147 550 4560	paul.mcdonald@imh.scot.nhs.uk

If an email address can be located, after selecting the contact name, click on 'Edit' under the 'Contact Options'



Enter the email address into the 'Primary Email' field and click 'Submit'. This is to ensure delivery notifications can be sent.

Click on the 'Order Checking' icon

Working your way down the screen, input each section, starting at 'Order number' using your barcode scanner, scan the 'ORD' barcode, this will enter the ORD number located at the top-right of the ORD paperwork. If no barcode scanner is available, type the ORD number eg. "ORD80574"

<b>Invoice Address</b> 00006353 Medicoline ApS Vaerkstedsvej 24 B Koege Denmark VAT No: DK33046960 DK-4600	<b>Delivery Address</b> Medicoline ApS Vaerkstedsvej 24 B Koege Denmark VAT No: 33046960 DK-4600	<b>Order No.</b> <b>ORD80574</b> DOC96905 Date Required 01/06/16 Date Entered 01/06/16 Order Priority 3 Customer Reference 01/06/2016 This Order Is Priced In Euros
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The 'Entered into Opera by' box needs to contain the name of the person listed at the bottom-left of the ORD in capital letters. This is the person who added the order to Opera

Order Checking:

Order number: ORD80574

O Account Number: 00009353

Entered into Opera By: **KATIE**

Priority on Order: 3

Customer Order sent Via: Email

Contact in Supply if on Order: No

Notes: Visible to Goods out

If No Stock Customer informed of Timescale: No

Allow order to be Picked: No

When order picked inform: No Follow up required

Can be shipped early if ready: No

Hold Packing AMENDING order: No

Add Mailing? Confirm

Confirm

Lotte Persson - +45 3613 6488

KATIE

'Priority on order' needs to match the priority as seen at the top-right of the ORD

Order No.: ORD80574

DOC96905

Date Required 01/06/16

Date Entered 01/06/16

Order Priority 3

Customer Reference 01/06/2016

Click the appropriate button for method of how the PO was received, as per the original PO from the customer.

Order Checking:

Order number: ORD80574

O Account Number: 00009353

Entered into Opera By: KATIE

Priority on Order: 3

Customer Order sent Via: Email

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Confirm

Any hand-written notes on the ORD must be typed here in the 'Notes' field.

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Order number: ORD80574

O Account Number: 00009353

Entered into Opera By: KATIE

Priority on Order: 3

Customer Order sent Via: Email

Contact in Supply if on Order: No

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Hold Packing AMENDING order: No

Add Mailing? Confirm

Confirm

0012165 CHECK P Recent price change

0120131 CHECK P Recent price change

0120133 CHECK P Recent price change

0212009 CHECK P Recent price change

0212010 CHECK P Recent price change

0212011 CHECK P Recent price change

0212012 CHECK P Recent price change

0212013 CHECK P Recent price change

0212014 CHECK P Recent price change

0212015 CHECK P Recent price change

0212016 CHECK P Recent price change

If the order is a priority 1, or if there is a note to advise \*name\* when invoiced or dispatched, choose the name of the person who added the order in the 'When order picked inform:' box. This will send an issue to this person advising them that the order is to be dispatched the same day, allowing this person to contact the customer.

**Order Checking:**

Order number	ORD0574
D Account Number	0000553
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Cut off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Ready to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	
When order picked inform	
Can be shipped early if ready	(Customer happy to receive order before Due date)
Hold Packing AMENDING order	
Add Mailing?	
Confirm	Confirm

If it is a forward order and there is a note to say the order can be shipped early, tick the 'can be shipped early if ready' box.

This box can also be ticked if cut-off time has been missed as long as the customer has not requested delivery on a specific date.

E.g. If you are checking a priority 3 order which has the next working day's date and the time is 2pm, this box can be ticked as UPS do not arrive until around 3pm.

If the due date is the next working day:  
 Priority 2 can be ticked between 11am and 12pm  
 Priority 3 can be ticked between 1pm and 3pm  
 Priority 4 can be ticked between 3:30pm and 4pm

**Order Checking:**

Order number	ORD0574
D Account Number	0000553
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Cut off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Ready to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	
When order picked inform	
Can be shipped early if ready	(Customer happy to receive order before Due date)
Hold Packing AMENDING order	
Add Mailing?	
Confirm	Confirm

If the customer changes any part of the order, or should the order need amending for any reason, tick the 'Hold packing AMENDING order' box to prevent the order being invoiced or shipped. Ensure you inform Goods Out of this and reprint the ORD once amended, hand-write a note at the top of both copies of the ORD stating \*amended\* and place in the checking tray to be re-checked.

**Order Checking:**

Order number	ORD0574
D Account Number	0000553
Entered into Opera By	Kate Evans
Priority on Order	3 UPS Courier Service Cut off 13.00
Customer Order sent Via	Email Post Phone Fax
Contact in Supply if on Order	
Notes	
Ready to Goods out	
If No Stock Customer informed of Timescale	
Allow order to be Picked	
When order picked inform	
Can be shipped early if ready	(Customer happy to receive order before Due date)
Hold Packing AMENDING order	
Add Mailing?	
Confirm	Confirm

When all details are correct, click 'confirm'.