

## Sending SOR Checklist

- Director authorisation on samples request paperwork
- SOR number
- Items been scanned to SOR
- Quotation
- Signed delivery note/shipping invoice
- Second copy of first page of delivery note/shipping invoice
- Feedback form
- Cover letter on letterhead
- Relevant leaflet and price list
- Relevant Sales Manager's business card
- Blue Viamed folder
- Schedule an issue for follow-up

## Paperwork Checklist

To File	To Ship
Copy of delivery note/shipping invoice	Signed delivery note/shipping invoice
Signed SOR request paperwork	Cover letter
Quotation	Customer SOR feedback form
Signed Terms & Conditions	Price list
	Leaflet
	Quotation
	Sales Manager's business card
	Blue Viamed folder

## VM3COP20.13 Sending Sale or Return Orders

### Beginning the Process

1. 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.



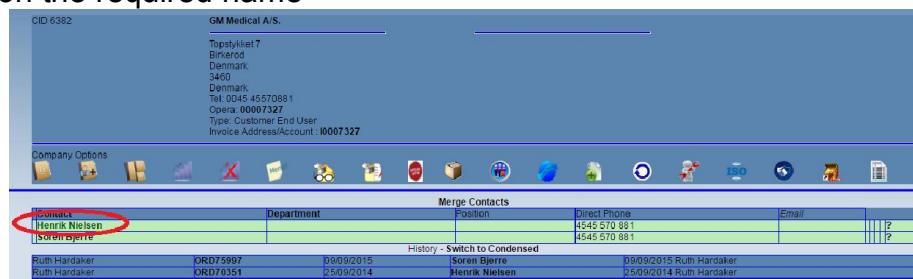
2. From the Lookup/Magnifying Glass tab on Instrastats, Click on the 'Contacts' search field and type the company name or account number



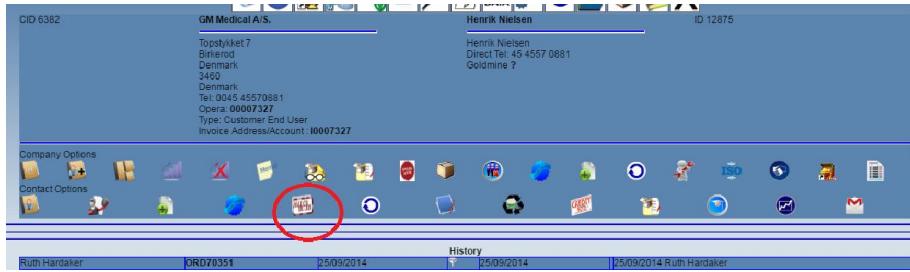
3. Click the correct account



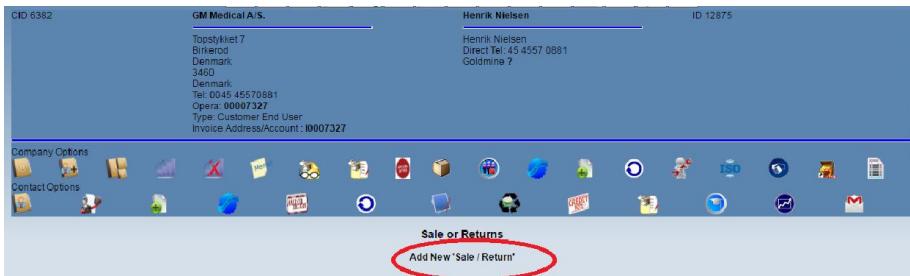
4. Click on the required name



5. Click on the Sale or Return icon



6. Click, "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 Viewed Product Trial Feedback Form							
Sale Returns Not Sent / In Preparation							
SCR	Account	Created	Name	Add	Shipping Notes	Send	
SCR628	000C2360	01Dec2014	Aredale General Hospital				
SCR682	000C2360	03Dec2015	Aredale General Hospital				
SCR642	00004990	23Feb2015	Birmingham Heartlands Hospital				
SCR705	00007995	30Mar2016	Concessus Medical (Euro)				
BCR726	000C1900	17Jun2010	Clarendonshire Royal Hospital				
BCR729	000C7327	22Jun2016	GM Medical A/S				
BCR717	000C7374	03May2016	Heathcote Ltd				
SCR681	00005172	11Nov2015	Princess Royal University Hospital				
SCR722	00012666	27May2016	Phony Hospital Chelmsford				
SCR627	00005990	24Nov2014	Royal Bolton Hospital				
SCR671	00003220	19Aug2015	Royal Free Hospital				
SCR692	00000009	26Feb2016	Staff Purchasing account				
SCR693	00000009	29Feb2016	Staff Purchasing account - KE				
SCR724	00004890	16Jun2016	Swapping Hill Hospital				
SCR674	00002130	08Sep2015	University Hosp of Hartlepool				
BCR718	00000002	09May2016	Yanmed Ltd				
SCR720	00000002	23May2016	Yanmed Ltd				
SCR725	0003450	16Jun2016	Whipps Cross University Hospital				
SCR726	0003450	16Jun2016	Whipps Cross University Hospital				
BCR727	000C3450	16Jun2016	Whipps Cross University Hospital				

7. 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 Viewed Product Trial Feedback Form							

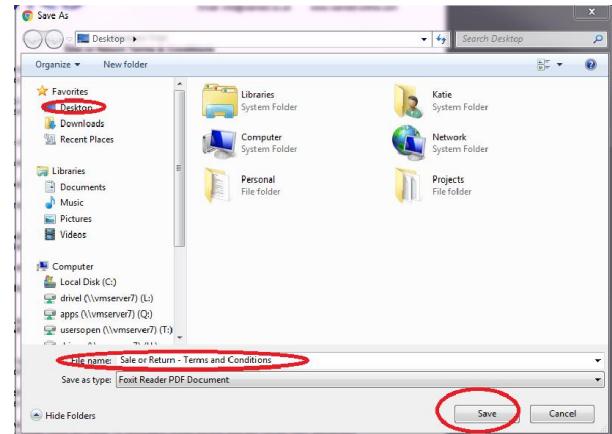
8. Click the PDF icon to open the file

Company ISO Manual Files Index						
Document ID	Type	Description	More	Usage	Added	Expires
5811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	Details	Unrestricted	19 Feb 2010	

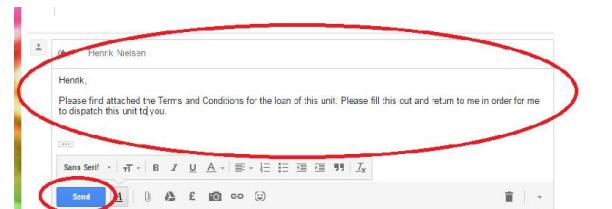
9. When the file opens, click on the download icon located at the top-right of the screen



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

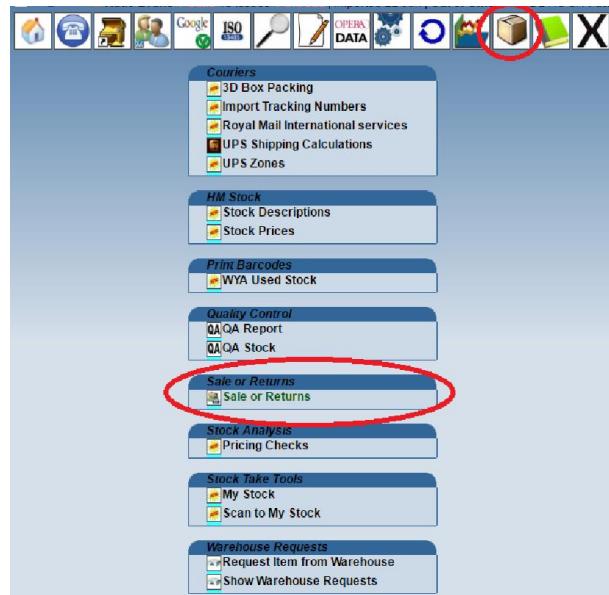


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email to the left.



## Requesting Stock Movement

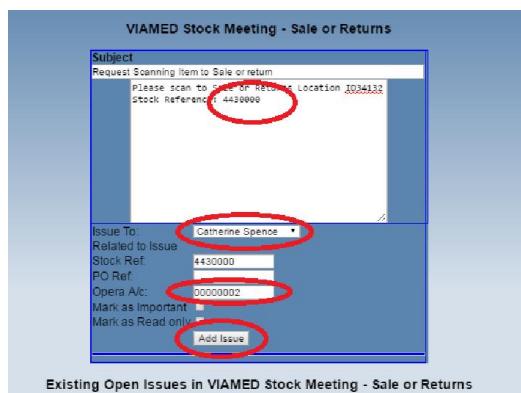
12. Return to Instratats and click on the stock box icon. From this page, click on 'Sale or Returns'



13. Scroll to the bottom of the page and click "Request new stock item to be scanned to Sale or Return".



14. Fill in the issue detailing the part number(s) and quantity required. Send this issue this to the person in Goods Out, fill in the Opera A/c number and click "Add Issue"



15. 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 received 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(s) provided for the product(s) scanned.

16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.

Add a New Sale / Return Completed Sale / Returns analyse_sale_return							
Please Send an Email or Return the Product							
Product Title - See or Return Terms and Conditions							
Name of Product / The Feedback Form							
Barcode	Account	Created	Name	Address	City	Postcode	Shipping Notes
BR0628	0000230	01/05/2014	Nicolaas Gompers Hospital	1000	Brussels	1000	Belgium
BR0682	0000230	03/05/2015	Hôpital Universitaire Saint-Pierre	1000	Brussels	1000	Belgium
BR0647	0000230	22/04/2015	Universitair Ziekenhuis	1000	Brussels	1000	Belgium
BR0695	0000230	30/04/2016	Universitair Ziekenhuis	1000	Brussels	1000	Belgium
BR0700	0000230	17/04/2016	Centres de Santé du Roi Baudouin	1000	Brussels	1000	Belgium
BR0720	0000737	22/04/2015	SM Medico Royal Hospital	1000	Brussels	1000	Belgium
	00007374	03/05/2016	Medivest Ltd (Euro)	1000	Brussels	1000	Belgium

Use the SOR number as the 'Cust Ref' unless an order number for the quote has been received.

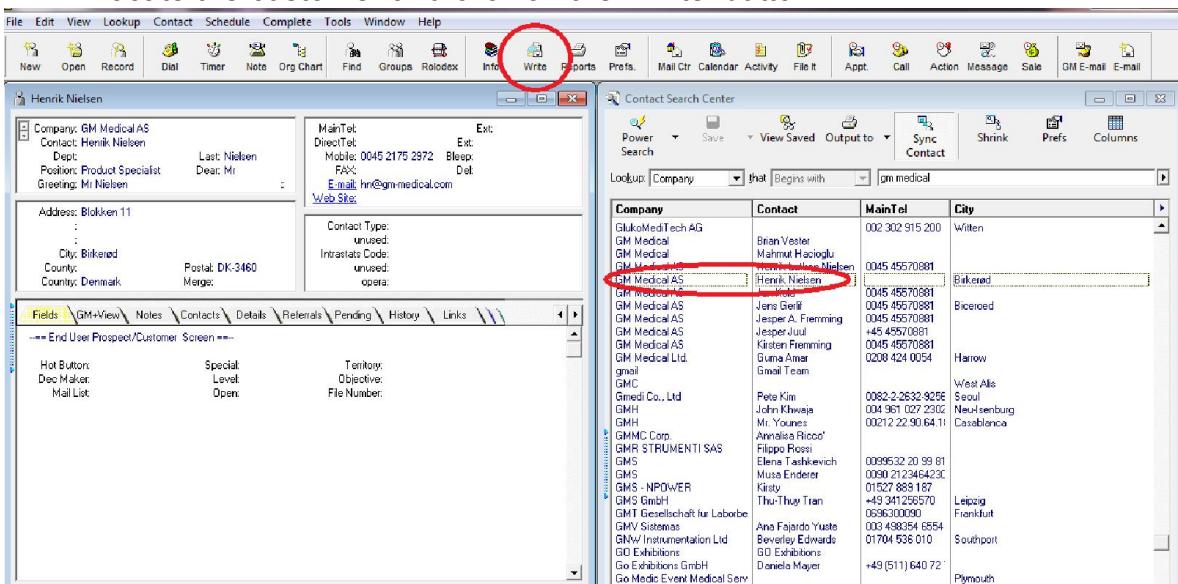
The screenshot shows the OPERA for Windows application window. The menu bar includes File, Edit, ESC, F1, F9, Cancel, Help, and Accept. The left sidebar has buttons for Find, Previous, Next, Add, Edit, View, Memo, Quoile, Proforma, Order, Delivery, Invoice, Credit, and Quit. The main area displays a delivery document for GM Medical A/S. The document header shows 'Delivery' and the recipient's address: Blokken 11, DK-3460 Birkerød, Denmark. The body of the document includes fields for Cust Ref (SØR729), Date (22/06/16), Priority (3), W/House (MAIN), Main Warehouse, Document Type (\*\* AUTO \*\*), and Model (N). Below this, 'Raised By' is listed as KATIE. A red circle highlights the Cust Ref and Date fields. Another red circle highlights the entire document body and the 'Raised By' field.

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

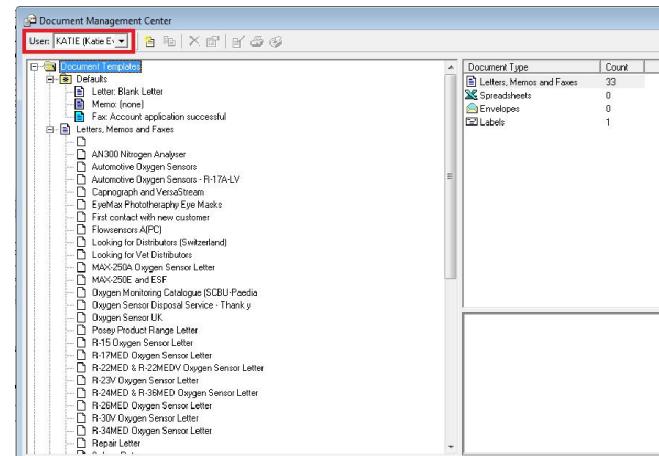
Ensure you type the serial numbers in the memo for each item sent. **\*\*\*HOW TO ADD MEMOS PLUS SCREEN SHOTS\*\*\***

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

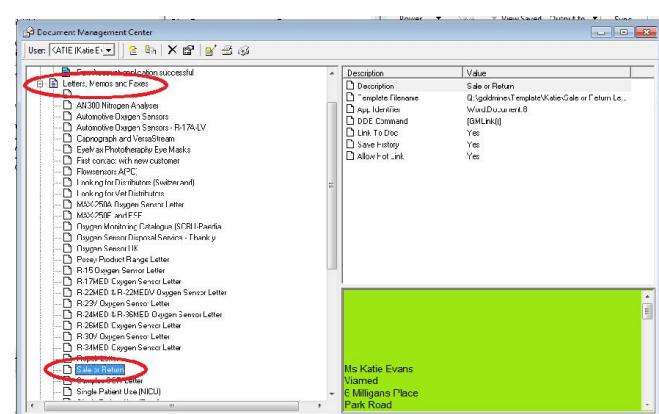
18. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button



14. Ensure the user is set to your name



15. 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.



16. When the letter opens, amend all the details as indicated in the example to the right, to include the product description, part numbers, SOR number and serial number.

When complete, read through the letter and ensure the grammar is correct, i.e. If there is more than one item, the words, "This product is" may need to be changed to, "These products are" and remove the word, "Trust" if not for the NHS.

17. When complete, print one copy of this letter on letterhead and save to 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"

18. Print a colour price list from L:\ Drive in the correct currency as found on the customers Opera account.

Mr Henrik Nielsen  
Product Specialist  
GM Medical AS  
Blokken 11  
Birkeroed, 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 ?

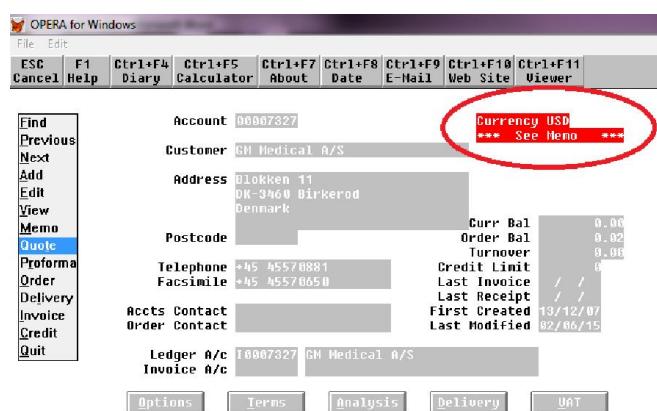
This product is brand new and unused, so if after evaluation the end user wishes to purchase it, it can just raise an official order and keep the instrument, otherwise we will require it returning in its original packaging.

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.

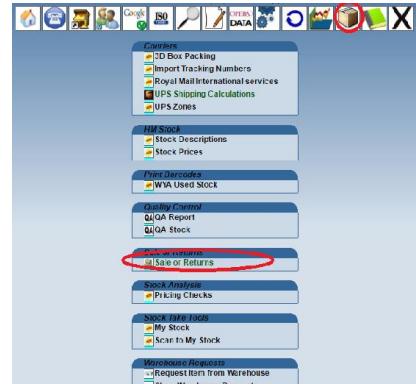
Should you have any queries, or wish to discuss the instrument in further detail, please do not hesitate to contact me.

Yours sincerely

Katie Evans  
Office Administrator



19. Return to the main SOR page located in Intrastats>Stock icon>"Sale or Returns"



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

21. Ensure the name and address details at the top of the screen are correct.

22. 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.

23. 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".

24. In the field entitled "The trial/testing to be undertaken by the authority (if any)" type 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".

25. If the Sale or Return is for an export customer then a value needs to be entered in the, "Value for Customs if applicable". Consult with the International Sales Manager or the Commercial Director for the customs value to use.

26. 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.

Destination: (Updates only affect ISOR 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	Topptykket 7 Birkerød Denmark
PostCode	3490
	<input type="button" value="Update"/>

3210070 Silicone Face Mask, Size 0 Tracking3 (ID60307)	<input type="checkbox"/>	Barcode
3210070 Silicone Face Mask, Size 0 Tracking3 (ID60307)	<input type="checkbox"/>	Purpose of Device
3210070 Silicone Face Mask, Size 0 Tracking29 (ID90423)	<input type="checkbox"/>	The trial/testing to be undertaken by the authority (if any)
3210070 Silicone Face Mask, Size 0 Tracking29 (ID90424)	<input type="checkbox"/>	
3210070 Silicone Face Mask, Size 0 Tracking31 (ID50425)	<input type="checkbox"/>	
0014835 Pulse Oximetry Wrap Sensor EDL03480 (ID70180)	<input type="checkbox"/>	
0014750 So2 Pulse Oximetry Sensor - Adult EDM03272 (ID71177)	<input type="checkbox"/>	
0014400 Pulse Oximetry VM 2160 TS 1000185 (ID41000)	<input type="checkbox"/>	
0034049 Disposable SpO2 Sensor - Adult Tracking1 (ID880288)	<input type="checkbox"/>	
0034049 Disposable SpO2 Sensor - Adult Tracking10 (ID880207)	<input type="checkbox"/>	
0034093 Disposable SpO2 Sensor - Adult Tracking11 (ID880298)	<input type="checkbox"/>	
0034093 Disposable SpO2 Sensor - Adult Tracking12 (ID880299)	<input type="checkbox"/>	
0034092 Disposable SpO2 Sensor - Adult Tracking13 (ID889300)	<input type="checkbox"/>	
0034092 Disposable SpO2 Sensor - Adult Tracking14 (ID889301)	<input type="checkbox"/>	
3210070 Silicone Face Mask, Size 0 Tracking3 (ID60307)	<input type="checkbox"/>	

0013101 Pulse Oximeter VM 2161 0000125 (ID80790)	<input type="checkbox"/>	
4330002 Spincrite APO Tracking (ID99101)	<input type="checkbox"/>	
4330022 SpincTrue APO Tracking (ID97182)	<input type="checkbox"/>	

Destination:	(Updates only affect SCR 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	Topstryklet 7 Birkerød Denmark
PostCode	3460
	<a href="#">Update</a>
0012101 Pulse Oximeter VM 2101 90500125 (ID#49730) <a href="#">Barcode</a>	
Finger Pulse Oximeter <a href="#">Purpose of Device</a>	
Sale or Return that to determine suitability prior to purchase <a href="#">The trial/testing to be undertaken by the authority (if any)</a>	
<a href="#">Loan</a> • <a href="#">Submit</a>	
Current items on sale Return ID #729 <a href="#">Print</a> <a href="#">Picking List</a>	
<a href="#">Stock</a> <a href="#">Ref</a> <a href="#">Serial number</a> <a href="#">Barcode</a> <a href="#">Description</a> <a href="#">Type</a>	

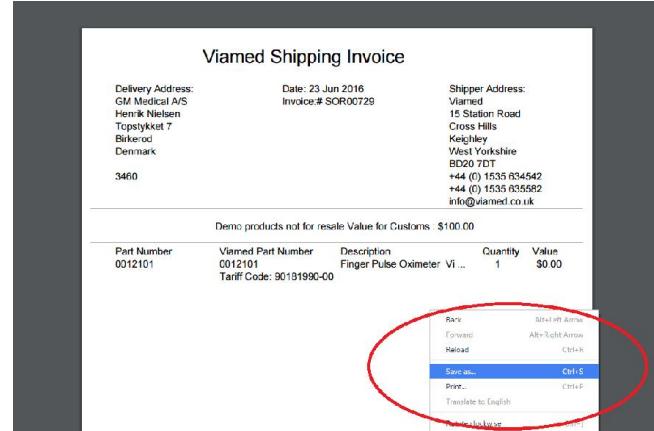
Destination: (Updates only affect SCR not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company	Metavera AB
Contact	Michael Baumann
Department	
Address	
PostCode	
Value for Customs if applicable	85
<input type="button" value="Update"/>	
<input type="checkbox"/> 3210070 Silicone Face Mask, Size 0 Tracking3 (0560397) <input type="button" value="Barcode"/>	
<input type="checkbox"/> Disposable SpO2 Sensor - Adult <input type="button" value="Barcode"/>	
<input type="checkbox"/> Purpose of Device	
<input type="checkbox"/> free of charge sample for evaluation	
<input type="checkbox"/> The trial/testing to be undertaken by the authority (if any)	
<input type="checkbox"/> Loan <input type="button" value="Submit"/>	
<input type="checkbox"/> Current items on sale Return id #742	
<input type="button" value="Print Picking List"/>	
<input type="checkbox"/> 0034993 Tracking2... 0560300 Disposable SpO2 Sensor - Adult <input type="button" value="Barcode"/>	
<input type="checkbox"/> <input type="button" value="Remove"/> <input type="button" value="Print Delivery Note (Today date)"/> <input type="button" value="Print Delivery Note (Created date)"/>	

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

Export: "SOR Shipping Invoice - \*Customer Name\* - SOR\*\*\* - date backwards"

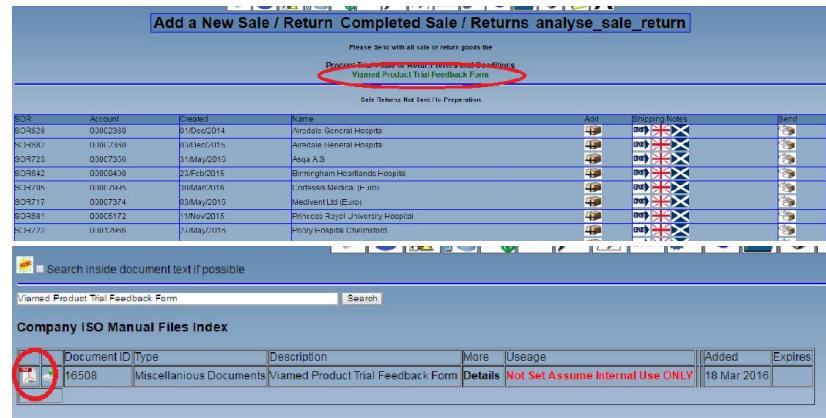
UK: "SOR Delivery Note - \*Customer Name\* - SOR\*\*\* - date backwards"



28. Print the delivery note/shipping invoice 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 "Form of Indemnity A" to ensure that ownership of the unit does not pass to the customer.

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



30. Click on the PDF icon

31. 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.

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

## Checking an SOR

Ensure the items listed on the delivery note/shipping invoice match the items requested by the customer

Ensure the paperwork to ship with the items has been placed in a blue Viamed folder. The folder should contain:

Delivery note/shipping invoice signed by a director
Cover letter on letterhead paper
Customer SOR feedback form
Price list for products being sent
Leaflets for products being sent
Quotation for products being sent
Relevant Sales Manager's business card

The paperwork to file should contain:

Copy of delivery note/shipping invoice
SOR request paperwork with director signature
A copy of the quotation for products being sent
Terms & Conditions signed by the customer

Stamp the filing copy of the delivery note/shipping invoice and initial/date next to it. Return to the person who added the SOR.

## After Checking

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

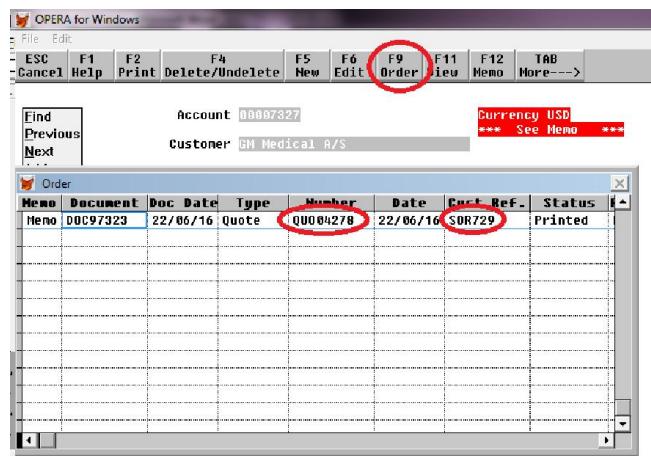
Put one copy of the **Opera quotation, letter, signed NHS Delivery Note (or shipping invoice for export customers), feedback form, leaflet, and price list** into a **blue, Viamed folder** with the relevant Sales Manager's **business card** and take to Goods Out.

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 the product(s) 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>

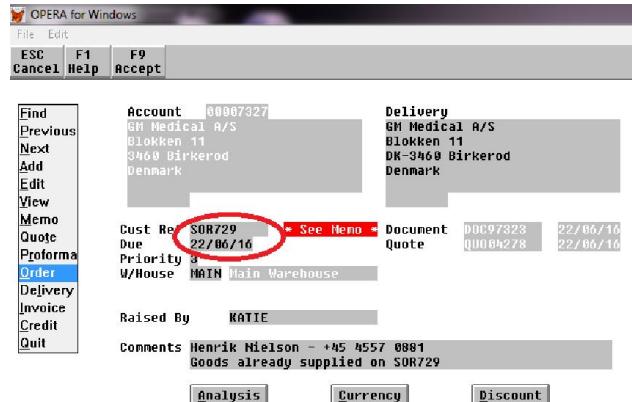
## SOR Purchase

If the customer chooses to purchase the SOR items, they will provide you with an official purchase order; if they have only provided an email agreement to purchase, please request an order number.

1. Retrieve the SOR paperwork from the SOR file.
2. Locate the account on Opera and press 'O' to open the orders menu.
3. Click on the correct quote and press F9 to convert the quote to an order.
4. When asked if you would like to edit, click yes.



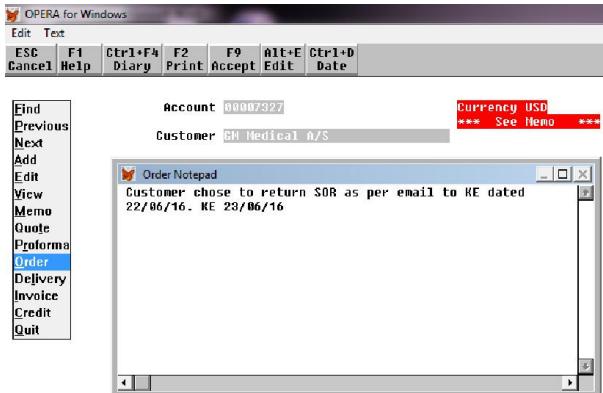
5. Amend the 'Cust Ref' box to the purchase order number and change the 'Due' date to the next available shipping day.
6. Press F9 twice to complete the order.



7. 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

1. 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.
2. When this issue is received, print it. 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



3. On the next screen, you will see the quote again, press F4 to delete, and click yes when asked to confirm.
4. Retrieve the SOR paperwork. Write on the front sheet that it has been returned and reference the issue number Goods In sent you to advise it has been returned.
5. Staple all of the SOR paperwork and the printed issue detailing the confirmation of return together and place in the Miscellaneous file as per VM3COP20.28 - Filing and Archiving.



## Notes

Product	Accessories	Loan/Giving
VM2160	SpO2 sensor (0014750 as standard)	Loan
VM-2500-S/M	SpO2 sensor (0014750 as standard)	Loan
	Sampling lines/airway adapters or Versastream	Giving
	If sending wrap sensor, a Posey wrap or 4000 series sensor wrap is required	Giving
AX/MX300i	R-17MED	Loan