

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

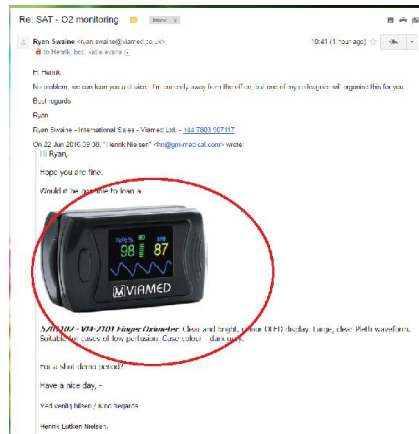
Paperwork Checklist

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

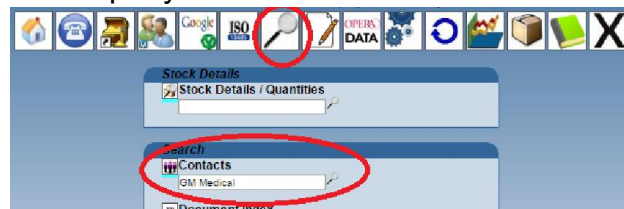
Sending Sale or Return Orders

Beginning the Process

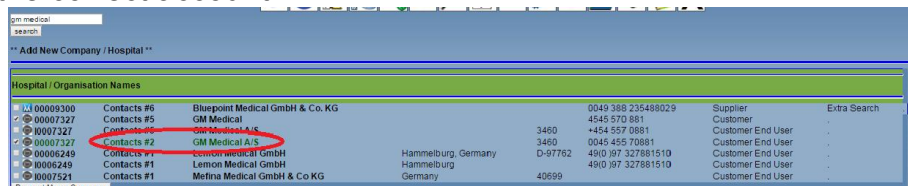
1. Print the Sale or return request if requested by email, if the request was verbal/telephone, add a telephone order and print as per VM3COP27.29. Gain authorization from a Director and their signature/date on the request paperwork.



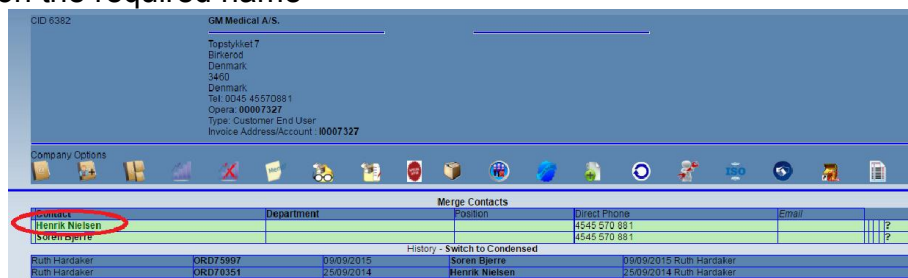
2. From the Lookup/Magnifying Glass tab on Intrastats, Click on the 'Contacts' search field and type the company name or account number



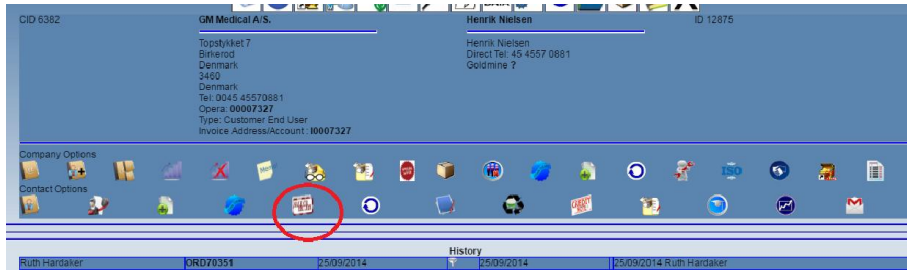
3. Click the correct account



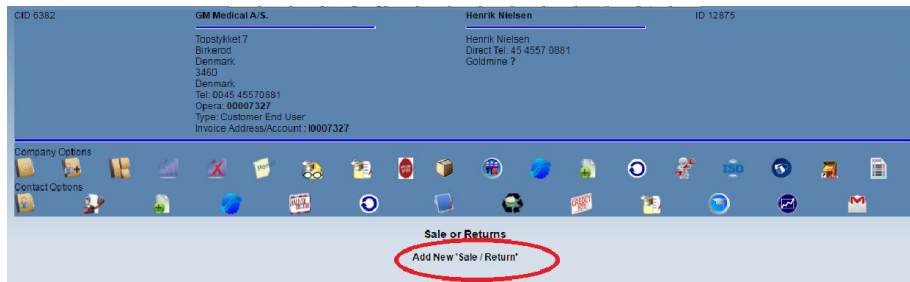
4. Click on the required name



5. Click on the Sale or Return icon



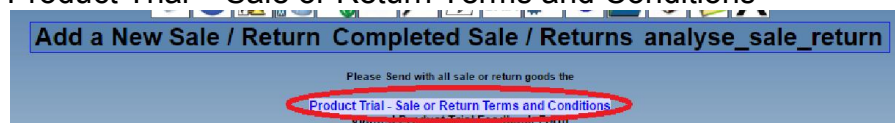
6. Click, "Add New Sale/Return"



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							
Named Product Trial Feedback Form							
Sale Returns Not Sent / In Preparation							
SCR	Account	Created	Name	Add	Shipping Notes	Send	
SCR628	00002360	01Dec2014	Aredale General Hospital	+	+	+	+
SCR682	00002360	03Dec2015	Aredale General Hospital	+	+	+	+
SCR642	00000490	23Feb2015	Birmingham Heartlands Hospital	+	+	+	+
SCR705	00007995	30Mar2016	Corfessis Medical (Euro)	+	+	+	+
SCR728	00001900	17Jun2016	Southampton Royal Hospital	+	+	+	+
SCR729	00007327	22Jun2016	GM Medical A/S	+	+	+	+
SCR717	00007374	23May2016	Northampton General	+	+	+	+
SCR681	00005172	11Nov2015	Princess Royal University Hospital	+	+	+	+
SCR722	00012966	27May2016	Prion Hospital Chelmsford	+	+	+	+
SCR627	00000590	24Nov2014	Royal Bolton Hospital	+	+	+	+
SCR671	00003220	19Aug2015	Royal Free Hospital	+	+	+	+
SCR692	00000099	26Feb2016	Staff Purchasing account	+	+	+	+
SCR693	00000099	26Feb2016	Staff Purchasing account - KE	+	+	+	+
SCR724	00002130	16Jun2016	Stappling Hill Hospital	+	+	+	+
SCR674	00002130	16Jun2016	University Hospital of Hartlepool	+	+	+	+
SCR718	00000002	19May2016	Varmed Ltd	+	+	+	+
SCR720	00000002	23May2016	Varmed Ltd	+	+	+	+
SCR726	00003450	16Jun2016	Whips Cross University Hospital	+	+	+	+
SCR728	00003450	16Jun2016	Whips Cross University Hospital	+	+	+	+
SCR727	00003450	16Jun2016	Whips Cross University Hospital	+	+	+	+

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



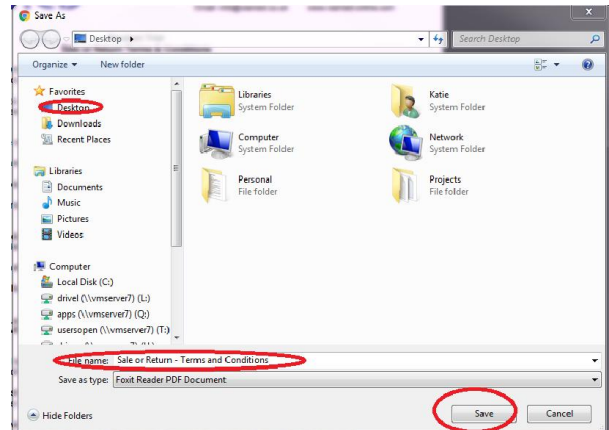
8. Click the PDF icon to open the file

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	
5811	Miscellaneous Documents	Product Trial - Sale or Return Terms and Conditions	Details	Unrestricted	19 Feb 2010		

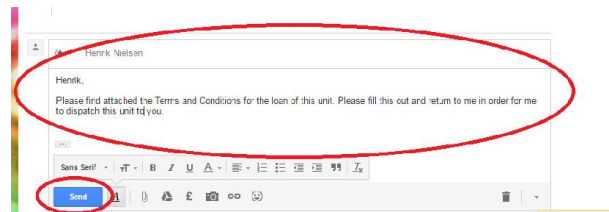
9. When the file opens, click on the download icon located at the top-right of the screen



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

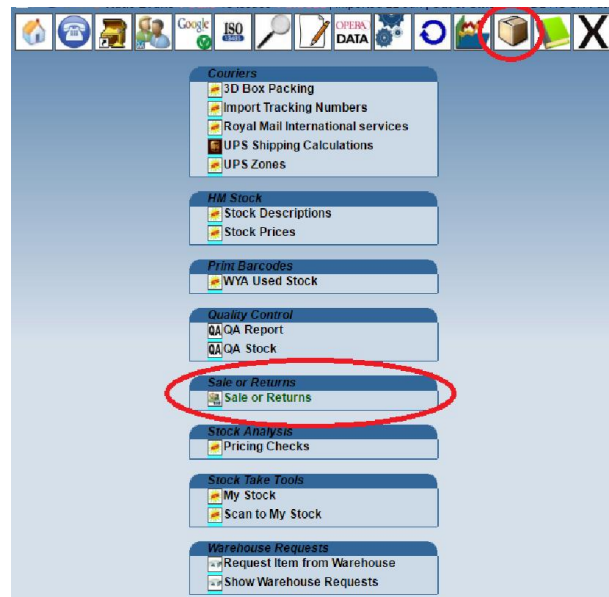


11. Return to the request email and reply to the customer to ask them to fill out the attached terms and conditions form and return them to you and click 'Send'. See sample email to the left.



Requesting Stock Movement

12. Return to Intrastats 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".

Barcode	Serialnumber	Stock Ref	Description
780106	CJUS4499	0314035	Purse Geometry Wrap Sensor
98298	Tracking9	0354981	Disposable SpO2 Sensor - Adult
98297	Tracking10	0354993	Disposable SpO2 Sensor - Adult
98298	Tracking11	0354993	Disposable SpO2 Sensor - Adult
98299	Tracking12	0354993	Disposable SpO2 Sensor - Adult
98300	Tracking13	0354993	Disposable SpO2 Sensor - Adult
98301	Tracking14	0354993	Disposable SpO2 Sensor - Adult
98307	Tracking3	321007C	Silicone Face Mask, Size 0
98423	Tracking29	321007C	Silicone Face Mask, Size 0
98424	Tracking30	321007C	Silicone Face Mask, Size 0
98425	Tracking31	321007C	Silicone Face Mask, Size 0
98436	80730145	441050C	Capriplast VM 250C-M
98502	160000104455_0	441050C	

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"

VIAMED Stock Meeting - Sale or Returns

Subject
Request Scanning Item to Sale or return

Please scan to Sale or Return Location 1034933
Stock Reference: 4420000

Issue To: Catherine Spence

Related to Issue
Stock Ref: 4430000

PC Ref: 00000002

Opera A/c: 00000002

Mark as Important

Mark as Read only

Add Issue

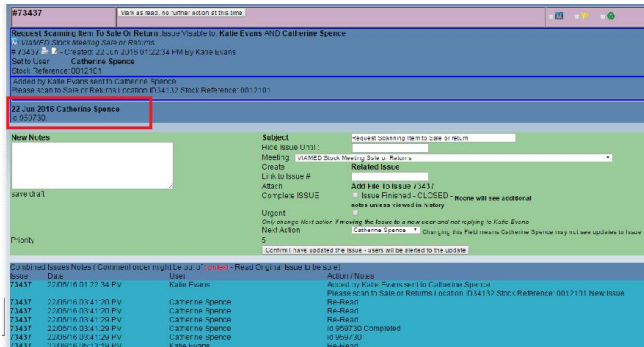
Existing Open Issues in VIAMED Stock Meeting - Sale or Returns

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.



Issue #	Date	Time	User	Priority
73437	22/06/16	11:27:34	PU	
73437	22/06/16	13:41:20	PU	
73437	22/06/16	13:41:20	PU	
73437	22/06/16	13:41:20	PU	
73437	22/06/16	13:41:20	PU	
73437	22/06/16	13:41:20	PU	

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.

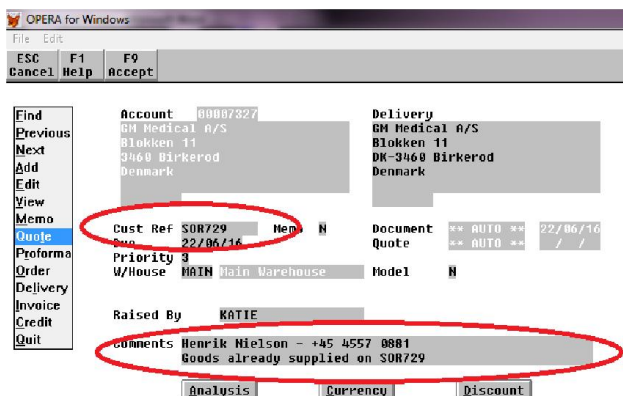
16. In Opera, follow the quote procedure VM3COP27.31 (Doc ID: 17063) to create a quote for the item requested, ensuring any quotes for over £/\$/€5000 are signed off by a director.



SOR	Account	Created	Name	Status	Priority
SOR729	00002360	01/06/2014	Medical General Hospital	Open	1
SOR729	00002360	05/06/2015	Medical General Hospital	Open	1
SOR729	00002360	22/06/2015	Medical General Hospital	Open	1
SOR729	00002360	22/06/2015	Medical General Hospital	Open	1
SOR729	00002360	22/06/2015	Medical General Hospital	Open	1
SOR729	00002360	22/06/2015	Medical General Hospital	Open	1

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

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

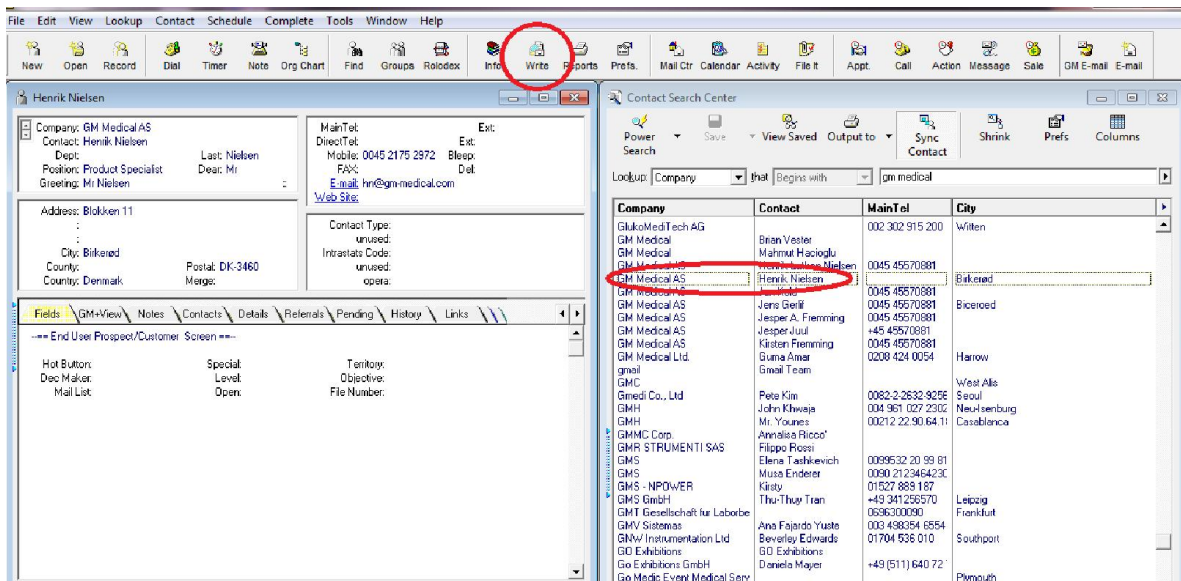


Account	Delivery	Cust Ref	Date	Priority	W/House	Raised By	Comments
00002360	Medical A/S	SOR729	22/06/16	3	Main Warehouse	KATIE	Henrik Nielson - +45 4557 0881 Goods already supplied on SOR729

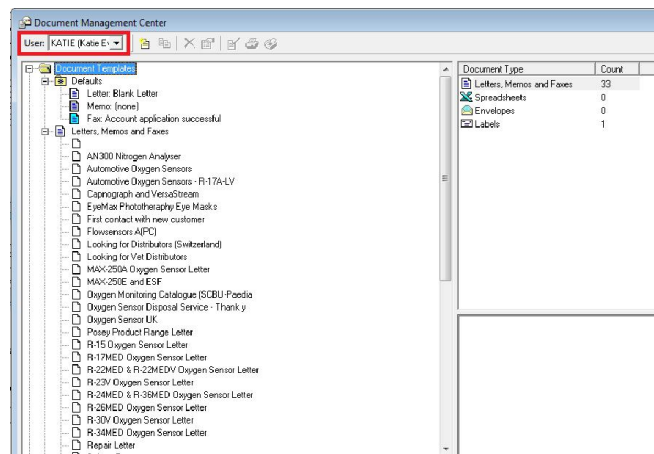
Ensure you type the serial numbers in the memo for each item sent. *****HOW TO ADD MEMOS PLUS SCREEN SHOTS*****

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.

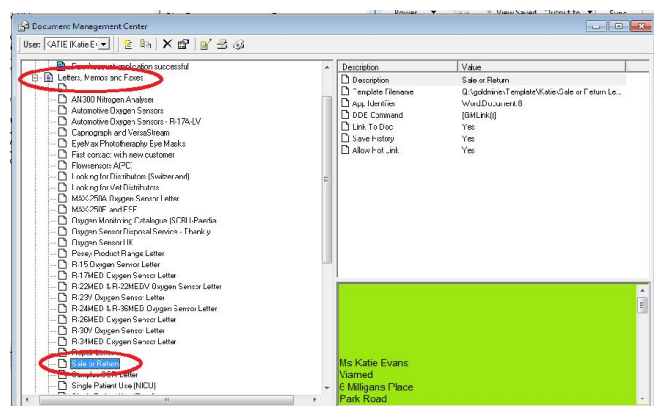
18. From GoldMine, using the Lookup function (refer to VM3COP20.081 for guidance), locate the customer and click on the 'Write' button



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"

Add a New Sale / Return Completed Sale / Returns analyse_sale_return									
Please Select with all sale or return grade file									
Product In - Sale or Returns Items and Composites									
Variant Product: 1141 Feedback Form									
Sales Status: Not Used - In Progress Item									
Sale	Actual	Desired	Name	Age	Progress	Grade	Grade	Grade	Grade
SORE18	00002360	01/06/2014	Arndale Game's Hospital	400	100%	100%	100%	100%	100%
SORE82	00002360	03/06/2015	Arndale Game's Hospital	400	100%	100%	100%	100%	100%
SORE72	00000700	23/06/2015	Amington-Hartlands Hospital	400	100%	100%	100%	100%	100%
SORE09	00001705	10/06/2016	Arndale Medical (Lanc)	400	100%	100%	100%	100%	100%
SORE78	00001300	17/11/2016	Gloucestershire Royal Hospita	400	100%	100%	100%	100%	100%
DOR729	00007327	22/11/2016	CM Medical AG	400	100%	100%	100%	100%	100%
SORE17	00007374	03/Nov/2016	Medivent Ltd (Lanc)	400	100%	100%	100%	100%	100%

Destination	(Updates only affect SCR not the Main CRM – if address needs updating in the CRM you must UPDATE both here and there)
Company	QM Medical A/S
Contact	Henrik Nielsen
Department	
Address	Topstykket 7
	Birkend
	Denmark
PostCode	2480
	Update

[illegible]

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

Company

Contact

Department

Address

PostCode

0012101 Pulse Converter VM 2101 90506125 (ID908730)

Pinger Pulse Converter

Sale or Return trial to determine suitability prior to purchase

The trial/testing to be undertaken by the authority (if any)

Loan


Current Items on sale Return id #729

Print **Print Picking List**

Stock Ref	Serial number	Barcode	Description	Type
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Warning: Updates only affect **SQR** not the Main CRM - if address needs updating in the CRM you must UPDATE both here and there)

Company	Meviane AB
Contact	Michael Baumann
Department	
Address	
PostCode	
Value for Customs if applicable	55
	Update

3215970 Silicone Face Mask, Size 0 Tracking3 (ID59397) 

Disposable SpO2 Sensor - Adult Purpose of Device

Free of charge sample for evaluation The trial/testing to be undertaken by the authority (if any)

[Learn](#) [Submit](#)

Current items on sale Return id #742

Print Print Picking List

Stock Ref	Serial number	Barcode	Description	Type
0034993	Tracking22	8563309	Disposable SpO2 Sensor - Adult	Remove Print Delivery Note (Today date) Print Delivery Note (Created date)

[illegible]

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"

Viamed Shipping Invoice

Delivery Address: GM Medical A/S, Henrik Nielsen, Topstykke 7, Birkerød, Denmark, 3460
 Date: 23 Jun 2016, Invoice# SOR00729
 Shipper Address: Viamed, 15 Station Road, Cross Hills, Keighley, West Yorkshire, BD20 7DT, +44 (0) 1535 834542, +44 (0) 1535 835692, info@viamed.co.uk

Demo products not for resale Value for Customs: \$100.00

Part Number	Viamed Part Number	Description	Quantity	Value
0012101	0012101	Finger Pulse Oximeter: Vi...	1	\$0.00

Tariff Code: 90181990-00

Print

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'

Add a New Sale / Return Completed Sale / Returns analyse_sale_return

Please select with all sale or return goods the
~~Product Sale/Return Form~~
 Viamed Product Trial Feedback Form

Sale Return Not Sent for Preparation	Sale	Account	Created	Name	Add	Shipping Notes	Send
SOR626	030C299	8/Dec/2014	Prostate General Hospital	48	001	0	0
SOR687	030C299	10/May/2015	Amesbury General Hospital	48	001	0	0
SOR723	030C736	11/May/2015	Aspa A.S	48	001	0	0
SOR842	030C949	25/Feb/2015	Birmingham Heartlands Hospital	48	001	0	0
SOR705	030C705	10/May/2015	Cardiff General Hospital	48	001	0	0
SOR717	030C734	03/May/2015	Medivent Ltd (Eilat)	48	001	0	0
SOR881	030C5172	11/May/2015	Princess Royal University Hospital	48	001	0	0
SOR772	030C772	27/May/2015	Princess Royal University Hospital	48	001	0	0

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	

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.

The screenshot shows the OPERA for Windows interface. The 'Order' menu is highlighted in the top bar. Below it, a table lists documents with columns: Memo, Document, Doc Date, Type, Number, Date, Cust Ref., and Status. The first row shows a document with Document ID D0C97323, Date 22/06/16, Type Quote, Number Q0004278, Date 22/06/16, Cust Ref. SOR729, and Status Printed. The 'F9 Order' button is circled in red.

Memo	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
Memo	D0C97323	22/06/16	Quote	Q0004278	22/06/16	SOR729	Printed

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.

The screenshot shows the OPERA for Windows interface with the 'Order' menu open. The 'Cust Ref' field is circled in red and contains 'SOR729'. The 'Due' date is '22/06/16'. The 'Document' field contains 'D0C97323' and the 'Quote' field contains 'Q0004278'. The 'Status' is 'Printed'. The 'Raised By' field contains 'KATIE'. The 'Comments' field contains 'Henrik Nielson - +45 4557 8881' and 'Goods already supplied on SOR729'. The 'F9 Accept' button is highlighted in the top bar.

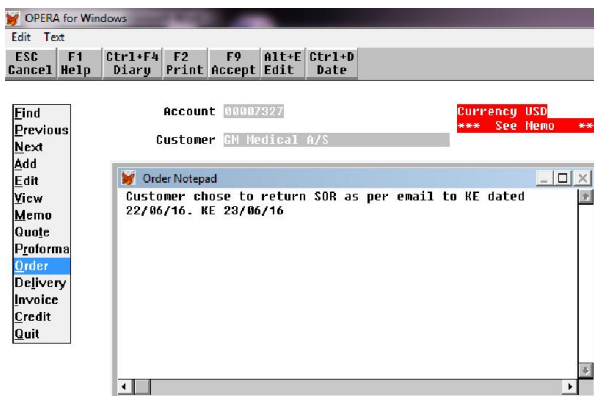
Find	Previous	Next	Add	Edit	View	Memo	Quote	Proforma	Order	Delivery	Invoice	Credit	Quit
Account	00007327									Delivery			
Customer	GM Medical A/S									GM Medical A/S			
Blocken	11									Blocken 11			
3460 Birkerod										DK-3460 Birkerod			
Denmark										Denmark			

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