

What we need from you

PREPARED FOR  **Northlight Group**

ALL NETWORK LOCATIONS

Give us the items on the next three pages once for each Northlight Group location, and every Meridian order after that moves through our floor without a single clarifying email. That is the whole promise. This guide tells you what to gather, what to attach to each order, and exactly when you will hear from us.

01	Before your first order Account, shipping, and compliance items to settle once	PAGE 2
02	What to send with each order The five items every order carries, and the mistakes that slow it down	PAGE 3
03	How we get back to you Confirmations, turnaround windows, who to call, and a tear-off reference	PAGE 4

YOUR ACCOUNT MANAGER

Jordan Vale, (555) 010-0104
jvale@apexinstruments.example

ORDERS DESK

orders@apexinstruments.example
(555) 010-0100, option 1

PORTAL

apexinstruments.example/portal
Available every day, all hours

Settle these once, before your first order

Most of this takes an afternoon. Tick each box as you go, then bring the sheet to your kickoff call and we will confirm everything against your account.

Account

Who can order, who gets invoiced, and who we should call when something needs a decision.

- ☐ **Signed partner agreement on file.** Countersigned copy returned to Jordan Vale.
- ☐ **Billing contact and invoice address.** Name, email, and whether you need PO numbers on every invoice.
- ☐ **Portal users named.** One administrator plus anyone who will place or track orders. Up to 25 users per location.
- ☐ **Authorized requesters listed.** People allowed to approve orders above \$5,000 and any service call-out.
- ☐ **Preferred product configurations chosen.** Default Meridian model, voltage, and mounting so we can pre-fill your orders.

Shipping

Where units go, who receives them, and how you want returns handled.

- ☐ **Ship-to address for every location.** Include suite, floor, and loading-dock notes. Residential addresses need a signature contact.
- ☐ **Receiving hours and a receiving contact.** Our carrier will not leave a Meridian unit unattended.
- ☐ **Carrier account (optional).** If you prefer to ship on your own account, give us the carrier and account number.
- ☐ **Return shipping preference.** Prepaid label from us, or your own carrier for service returns.

Compliance

The paperwork that lets us ship, calibrate, and service instruments at your site.

- ☐ **Tax exemption certificate, if it applies.** Without it we charge tax on every invoice until one arrives.
- ☐ **Site access requirements.** Badge, escort, or vaccination rules for on-site technicians and trainers.
- ☐ **Calibration standard you follow.** Tell us which standard your audits reference so certificates match.
- ☐ **Data handling preference.** Whether Meridian units may sync usage logs to the Apex portal.

TIP Send everything in one message to **onboarding@apexinstruments.example**. Avery Kellen's team confirms receipt the same business day and flags anything still missing, so you never have to guess whether you are ready to order.

What to send with each order

Five items travel with every order. When all five arrive together, the order is released to the floor the same day. When one is missing, it waits in a queue until someone tracks it down.

ITEM	WHY WE NEED IT	FORMAT	WHO PROVIDES IT
Purchase order or portal order number	It is the key we use to match your order, invoice, and shipment. Without it, finance holds the order.	PO-XXXX or AP-XXXXXX	Your purchasing contact
Product and configuration	Meridian Bench, Pro, and Field Kit each have voltage, mounting, and probe options. Guessing costs a rebuild.	Portal picker or order form	Requester
Ship-to location and receiving contact	Multi-site partners often have one billing address and many delivery addresses. We ship to the one on the order, not the one on file.	Location ID or full address	Requester
Requested delivery date and priority	Standard is 5 business days, priority is 2. Telling us the real need date lets us pick the cheapest route that still lands on time.	Date + Standard / Priority	Requester
Service add-ons	Calibration, an Atlas Care plan, or training are scheduled at order time so a technician is booked before the unit ships.	Tick list on the order	Requester or account manager
Special instructions (only when needed)	Dock restrictions, delivery windows, labelling for internal asset tags, anything the driver or technician should know.	Notes field, plain text	Anyone on the order

Common mistakes that add days to an order

- **Sending the order to a person, not the desk.** Emails to individual inboxes wait when that person is out. Use orders@ or the portal.
- **Leaving the PO for later.** Orders without a PO or portal number sit in a hold queue and do not reach the floor.
- **Mixing locations on one order.** One ship-to per order. Split the order if two sites need units.
- **Assuming the default configuration.** If your site has non-standard voltage or mounting, say so every time.
- **Adding calibration after shipment.** Post-shipment calibration means a second visit and a second charge of \$180.
- **Requesting priority without a date.** Priority is a 2-day promise; we still need to know the date you are planning around.

How we get back to you

You should never have to ask where an order is. Three messages arrive on every order, and the portal shows the same status in real time.

1

Receipt, within 2 hours

An email confirming we have the order, with the Apex order number and anything missing from the five items.

2

Release, same business day

Confirmation that the order is on the floor, the build date, and the technician booked for any add-on.

3

Shipment, when it leaves

Carrier, tracking number, and the delivery window. Service visits get a separate calendar invite.

Turnaround windows

Standard order	5 business days
Priority order	2 business days
Calibration, in our lab	3 business days
On-site training, scheduling	Within 10 business days
Service request acknowledgement	1 business hour
Loaner unit, Atlas Care Plus	Ships next business day

Business days are Monday to Friday, 8am to 6pm Eastern, excluding US federal holidays.

Who to contact

JV	Jordan Vale, Account Manager Pricing, agreements, new locations. (555) 010-0104
AK	Avery Kellen, Customer Success Lead Onboarding, portal access, training. (555) 010-0106
MR	Morgan Reyes, Operations Lead Order status escalations, shipping. (555) 010-0108
SD	Service desk Repairs, calibration, loaners. (555) 010-0100, option 2



TEAR OFF AND KEEP BY THE PHONE

✦ Apex Instruments

Quick reference for ordering Meridian instruments and Atlas service.

PLACE AN ORDER

orders@apexinstruments.example
or apexinstruments.example/portal

CALL US

(555) 010-0100
Option 1 orders, option 2 service

TURNAROUND

5 days standard
2 days priority, 3 days calibration