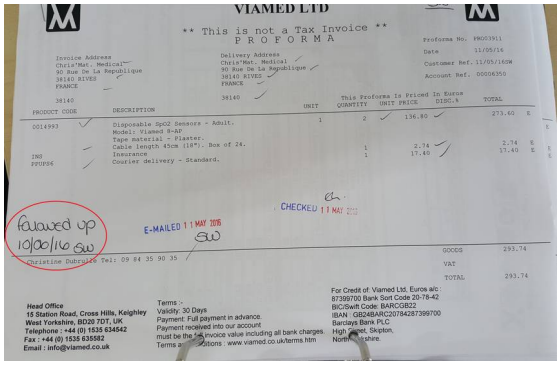
Proforma and Quote Chasing

Collect the proforma file from the office.


VIAMED LTD

** This is not a Tax Invoice **
PROFORMA

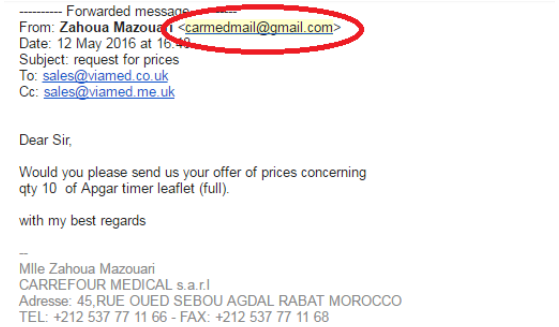
Followed up 10/06/16 SW

E-MAILED 11 MAY 2016 SW

CHECKED 11 MAY

Head Office
15 Station Road, Cross Hills, Keighley
West Yorkshire, BD20 7DT, UK
Telephone : +44 (0) 1535 634542
Fax : +44 (0) 1535 635582
Email : info@viamed.co.uk

Locate proformas dated more than 30 days old that have not yet been chased up. If this is done weekly, you should not find any proformas more than 38 days old that have not been followed up. If they have been followed up, there will be a note on the front of the proforma to state this.


---------- Forwarded message ----------
From: **Zahoua Mazouari** <carmedmail@gmail.com>
Date: 12 May 2016 at 16:40
Subject: request for prices
To: sales@viamed.co.uk
Cc: sales@viamed.me.uk

Dear Sir,

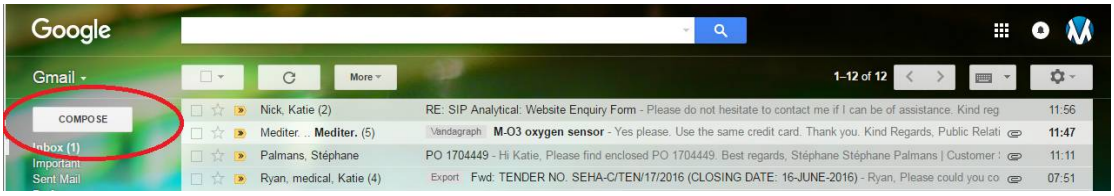
Would you please send us your offer of prices concerning
qty 10 of Apgar timer leaflet (full).

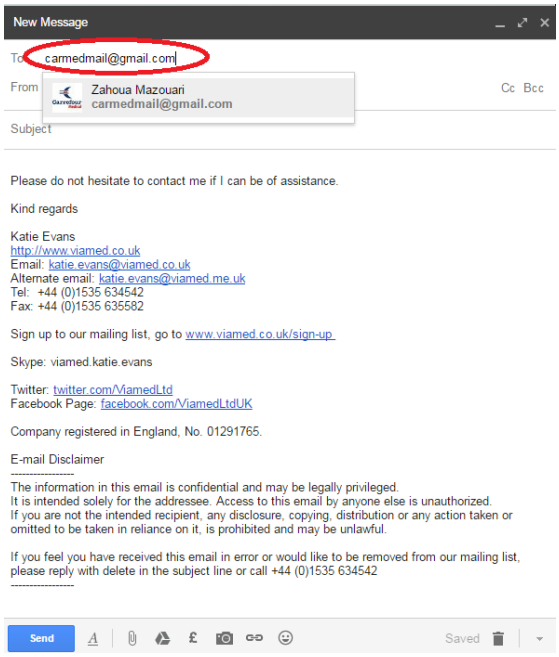
with my best regards

--
Mlle Zahoua Mazouari
CARREFOUR MEDICAL s.a.r.l
Adresse: 45,RUE OUED SEBOU AGDAL RABAT MOROCCO
TEL: +212 537 77 11 66 - FAX: +212 537 77 11 68

From the selection, take the first one out of the folder and locate the email address for the customer from the communication attached to the proforma.

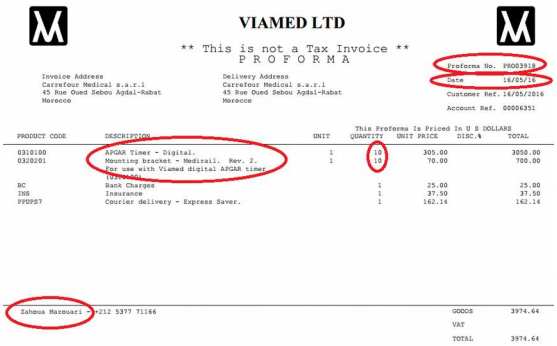
Navigate to your Gmail account and click ‘Compose’





Enter the customer’s email address in to the ‘To’ field.

On the subject line type, ‘Viamed Proforma: PRO*****’ replacing the ***** with the correct proforma number as found on the proforma.



VIAMED LTD

** This is not a Tax Invoice **
P R O F O R M A

Invoice Address
Carrefour Medical s.a.r.l
45 Rue Oued Sebou Agdal-Rabat
Morocco

Delivery Address
Carrefour Medical s.a.r.l
45 Rue Oued Sebou Agdal-Rabat
Morocco

Proforma No. PRO03918
Date 16/05/16
Customer Ref. 16/05/2016
Account Ref. 00006351

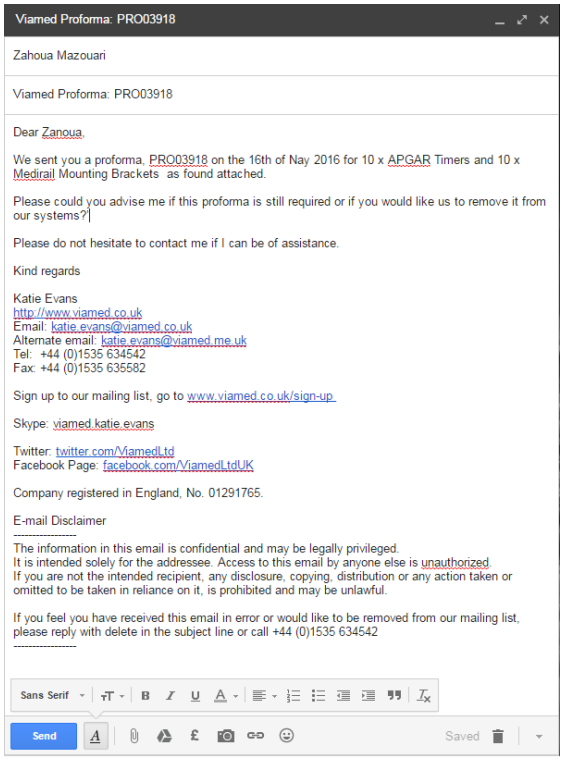
This Proforma Is Priced In U S DOLLARS

PRODUCT CODE	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	DISC.%	TOTAL
0310100	APGAR Timer - Digital.	1	10	305.00		3050.00
0320201	Mounting bracket - Medirail. Rev. 2. For use with Viamed digital APGAR timer (0310100).	1	10	70.00		700.00
BC	Bank Charges		1	25.00		25.00
INS	Insurance		1	37.50		37.50
FPUPS7	Courier delivery - Express Saver.		1	162.14		162.14

Zahoua Mazouari +212 5377 71166

GOODS 3974.64
VAT
TOTAL 3974.64

The customer name, date, product details and quantities can also be found on the proforma.



Viamed Proforma: PRO03918

Zahoua Mazouari

Viamed Proforma: PRO03918

Dear Zanoua,

We sent you a proforma, PRO03918 on the 16th of Nay 2016 for 10 x APGAR Timers and 10 x Medirail Mounting Brackets as found attached.

Please could you advise me if this proforma is still required or if you would like us to remove it from our systems?

Please do not hesitate to contact me if I can be of assistance.

Kind regards

Katie Evans
http://www.viamed.co.uk
Email: katie.evans@viamed.co.uk
Alternate email: katie.evans@viamed.me.uk
Tel: +44 (0)1535 634542
Fax: +44 (0)1535 635582

Sign up to our mailing list, go to www.viamed.co.uk/sign-up

Skype: viamed.katie.evans

Twitter: twitter.com/ViamedLtd
Facebook Page: facebook.com/ViamedLtdUK

Company registered in England, No. 01291765.

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It is intended solely for the addressee. Access to this email by anyone else is unauthorized.
If you are not the intended recipient, any disclosure, copying, distribution or any action taken or omitted to be taken in reliance on it, is prohibited and may be unlawful.

If you feel you have received this email in error or would like to be removed from our mailing list, please reply with delete in the subject line or call +44 (0)1535 634542

Sans Serif
Send
Saved

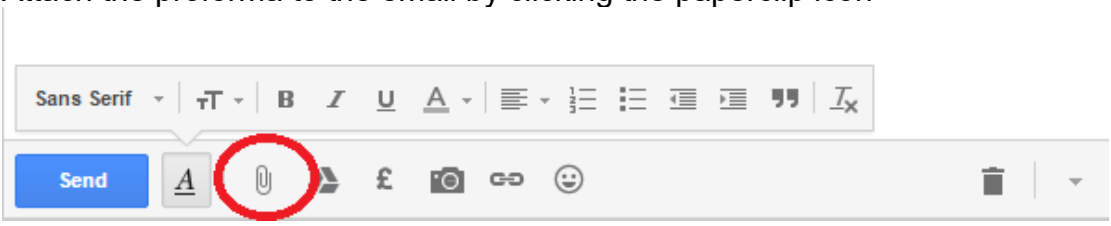
In the body of the email, type:

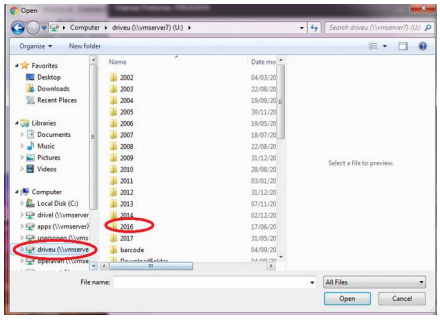
‘Dear **Customer Name**,

We sent you a proforma, PRO***** (proforma number) on **date** for **name products and quantities** as found attached.

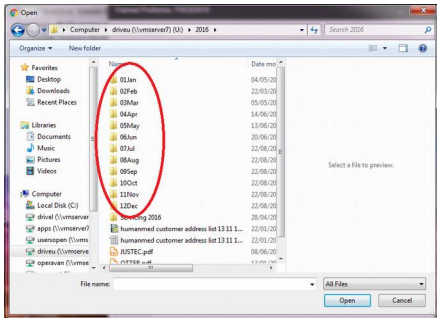
Please could you advise me if this proforma is still required or if you would like us to remove it from our systems?’

Attach the proforma to the email by clicking the paperclip icon

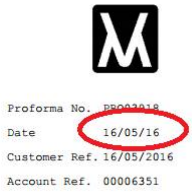


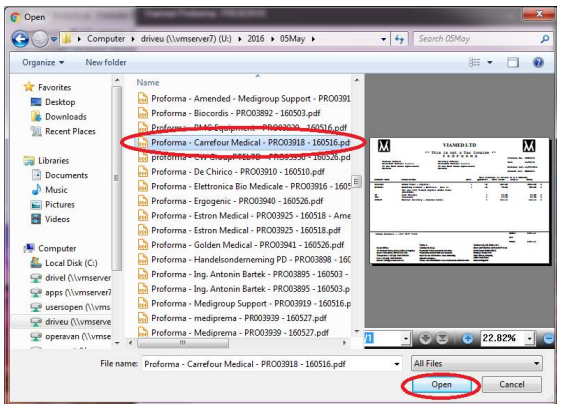


Click on ‘driveu’ and then double-click on the correct year.



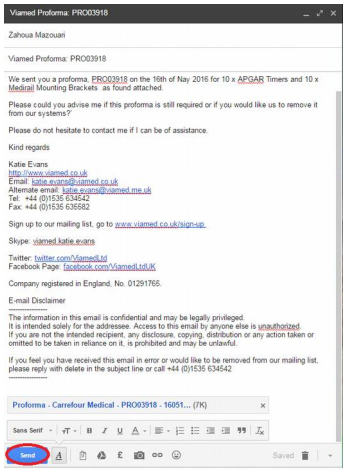
Navigate to the month in which the proforma was generated which can be found next to ‘date’ on the proforma.





Navigate to the correct proforma. Proformas are saved in the following format, ‘Proforma – Company name – PRO***** - date backwards’.

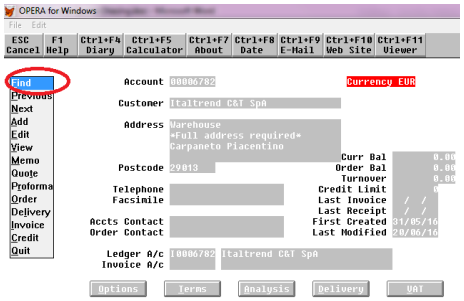
E.g. ‘ Proforma – Carrefour Medical – PRO03918 – 160516’



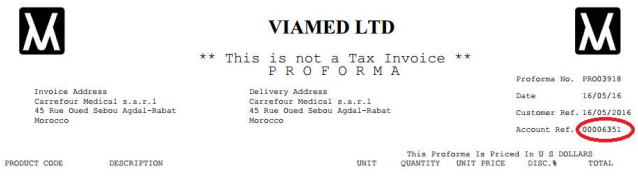
Check your email for spelling and accuracy of dates/proforma numbers etc, ensure the proforma is attached and click ‘Send’.

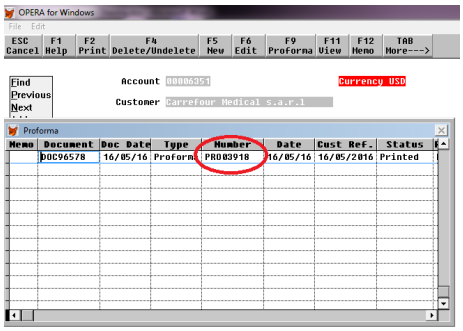
On the front of the proforma, write ‘followed up’ followed by your initials and the date then place back in the proforma file by proforma number.

After chasing all proformas, find proformas more than 3 months old and check for notes asking for them to be kept on file. If there are no notes, assume the customer no longer wants to retain the proforma and delete it. If a customer responds to say they no longer need the proforma, delete it.

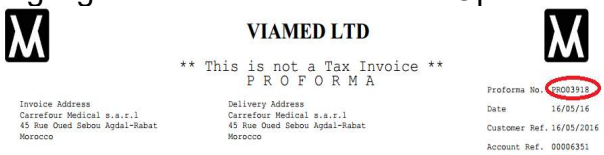


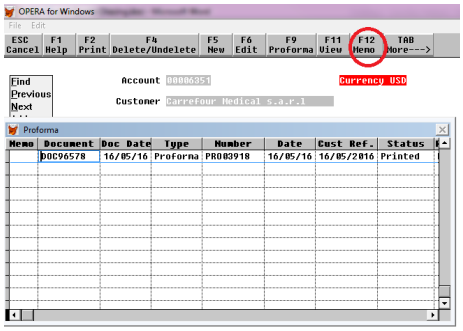
To delete the proforma from Opera, click ‘Find’ and enter the account number as seen on the proforma.





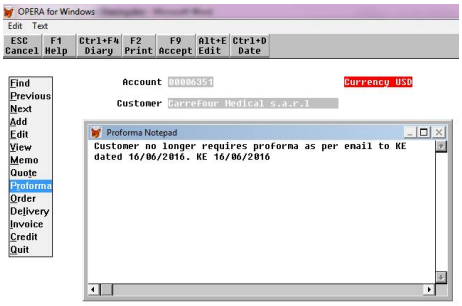
Click ‘Proforma’ and locate the proforma number as noted on the proforma, and highlight the correct number on Opera



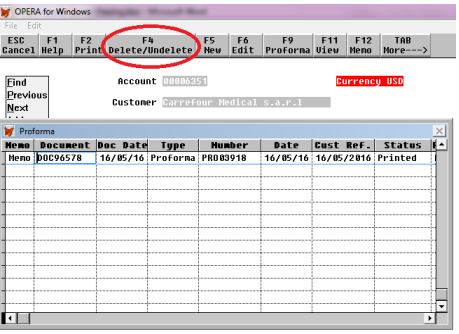


Click F12 to write a memo and type what has happened. E.g. the customer no longer wants the proforma, or customer has not responded to follow up email. Make a note of email correspondence should the customer confirm they no longer require the proforma. Initial and date ALL memos.

to save the memo then click when asked “Save Changes?”



Press F9 ‘Yes’



Click or press F4 to delete the proforma and click ‘Yes’ when asked, “Delete this document?”

Place the paperwork in the UK or export miscellaneous file in alphabetical, company name order.

Follow these steps for quotations, but do not chase quotations sent by Steve Hardaker / SJH for Infant Resuscitation Cabinets, Blenders or Tom Thumbs as he chases these himself. Chase quotations for any other products sent by Steve Hardaker / SJH if you check with him first and are given permission to do so.