

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 \*\***  
**PROFORMA**

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

Invoice No. PRO03918

Date 16/05/2016

Customer Ref: 16/05/2016

Account Ref. 00004351

PRODUCT CODE	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	DISC. %	TOTAL
0310100	APGAR Timer - Digital.	1	10	305.00		3050.00
0310001	Mounting Bracket - Medirail. Rev. 2. for use with Viamed digital APGAR timer	1	10	70.00		700.00
HC	Bank Charges	1		25.00		25.00
TMS	Insurance	1		27.50		27.50
PP0097	Courier delivery - Express Saver.	1		162.14		162.14

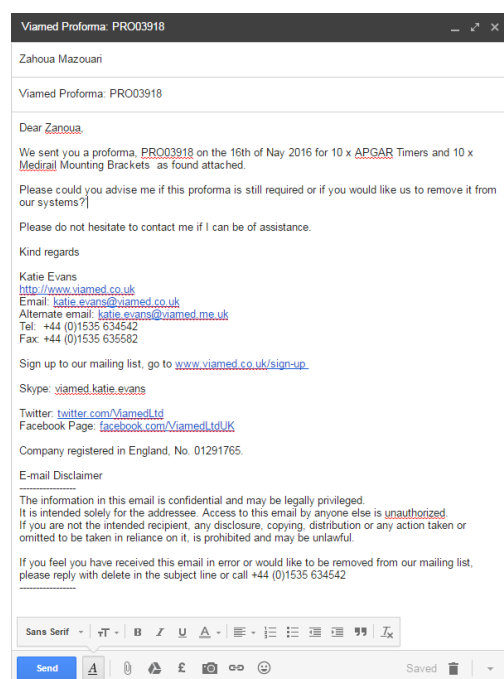
Zahoua Mazouai - 212 5377 71166

GOODS 3974.64

VAT

TOTAL 3974.64

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



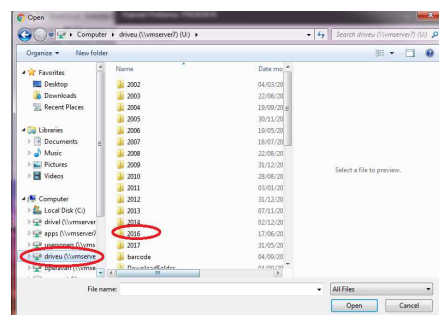
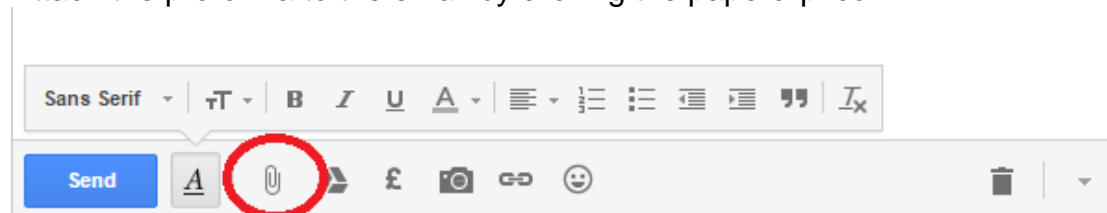
In the body of the email, type:

'Dear \*\*Customer Name\*\*,'

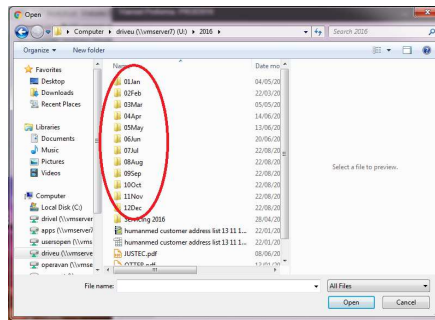
We sent you a proforma, PRO\*\*\*\*\* (proforma number) on \*\*date\*\* for \*\*name products and quantities\*\* as found attached.

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



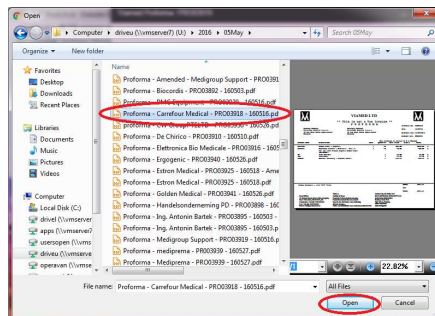
Click on 'driveu' and then double-click on the correct year.



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

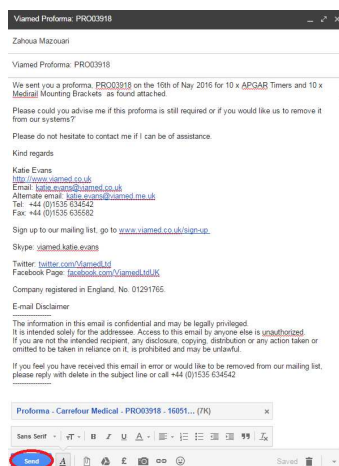


Proforma No. PRO03918  
Date 16/05/16  
Customer Ref. 16/05/2016  
Account Ref. 00006351



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.

## Deleting Proformas

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.

OPERA for Windows

File Edit

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

Account 00006782 Currency EUR

Customer Italtrend C&I SpA

Address Warehouse  
\*Full address required\*  
Carpaneto Piacentino

Postcode 29010

Telephone

Facsimile

Accts Contact

Order Contact

Ledger A/c 00006782 Italtrend C&I SpA

Invoice A/c

Options Terms Analysis Delivery VAT

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



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Delivery Address  
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Proforma No. 0003918  
Date 16/05/16  
Customer Ref. 16/05/2016  
Account Ref. 00006351

PRODUCT CODE DESCRIPTION UNIT This Proforma Is Priced In U S DOLLARS QUANTITY UNIT PRICE DISC.% TOTAL

OPERA for Windows

File Edit

ESC F1 F2 F4 F5 F6 F9 F11 F12 TAB  
Cancel Help Delete/Undelete New Edit Proforma View Memo More-->

Find

Account 00006351 Currency USD

Customer Carrefour Medical s.a.r.l

Proforma

Doc	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
DOC96578	16/05/16	Proforma	PRO03918	16/05/16	16/05/2016	Printed	

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



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OPERA for Windows

File Edit

ESC F1 F2 F4 F5 F6 F9 F11 F12 TAB  
Cancel Help Delete/Undelete New Edit Proforma View Memo More-->

Find

Account 00006351 Currency USD

Customer Carrefour Medical s.a.r.l

Proforma

Doc	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
DOC96578	16/05/16	Proforma	PRO03918	16/05/16	16/05/2016	Printed	

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.

OPERA for Windows

File Edit

ESC F1 Ctrl+F4 F2 F9 Alt+E Ctrl+D  
Cancel Help Diary Print Accept Edit Date

Find

Account 00006351 Currency USD

Customer Carrefour Medical s.a.r.l

Proforma Notepad

Customer no longer requires proforma as per email to KE dated 16/06/2016. KE 16/06/2016

Press F9 to save the memo then click 'Yes' when asked "Save Changes?"

OPERA for Windows

File Edit

ESC F1 F2 F4 F5 F6 F9 F11 F12 TAB  
Cancel Help Delete/Undelete New Edit Proforma View Memo More-->

Find

Account 00006351 Currency USD

Customer Carrefour Medical s.a.r.l

Proforma

Doc	Document	Doc Date	Type	Number	Date	Cust Ref.	Status
DOC96578	16/05/16	Proforma	PRO03918	16/05/16	16/05/2016	Printed	

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.

### **Quotations**

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.