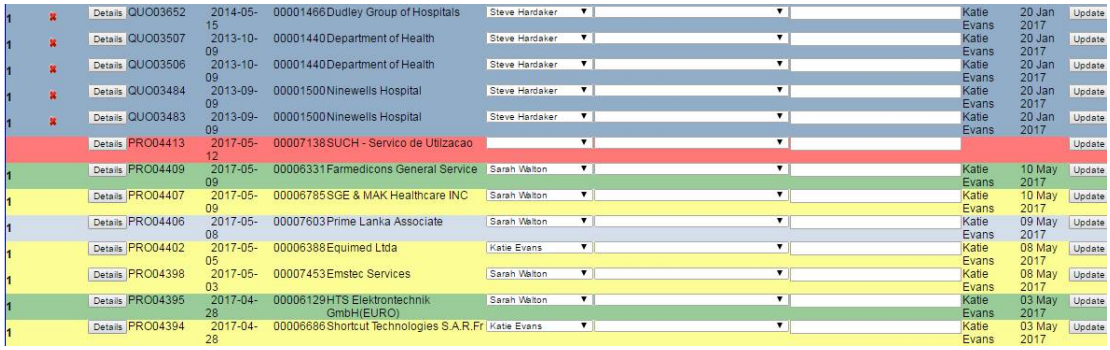
VM3COP27.32 - Proforma and Quote Chasing

Proformas must be chased after 2 weeks, then every 2 weeks until payment is received or the order is cancelled.

Quotations must be chased after 25 days, then every 2 weeks until order is received or the quotation is cancelled. *There are exceptions, see below.

From IntraStats, click on the magnifying glass/Lookup icon. Under the ‘Work Lists’ heading, click on ‘Quotes and Proformas’. This will direct you to a page detailing every quote and proforma currently outstanding.

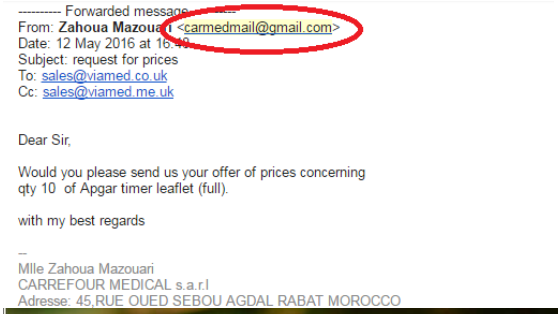


1	✖	Details	QUO03652	2014-05-15	00001466	Dudley Group of Hospitals	Steve Hardaker			Katie Evans	20 Jan 2017	Update
1	✖	Details	QUO03507	2013-10-09	00001440	Department of Health	Steve Hardaker			Katie Evans	20 Jan 2017	Update
1	✖	Details	QUO03506	2013-10-09	00001440	Department of Health	Steve Hardaker			Katie Evans	20 Jan 2017	Update
1	✖	Details	QUO03484	2013-09-09	00001500	Ninewells Hospital	Steve Hardaker			Katie Evans	20 Jan 2017	Update
1	✖	Details	QUO03483	2013-09-09	00001500	Ninewells Hospital	Steve Hardaker			Katie Evans	20 Jan 2017	Update
		Details	PRO04413	2017-05-12	00007138	SUCH - Servico de Utilizacao						Update
1		Details	PRO04409	2017-05-09	00006331	Farmedicons General Service	Sarah Walton			Katie Evans	10 May 2017	Update
1		Details	PRO04407	2017-05-09	00006785	SGE & MAK Healthcare INC	Sarah Walton			Katie Evans	10 May 2017	Update
1		Details	PRO04406	2017-05-08	00007603	Prime Lanka Associate	Sarah Walton			Katie Evans	09 May 2017	Update
1		Details	PRO04402	2017-05-05	00006388	Equimed Ltda	Katie Evans			Katie Evans	08 May 2017	Update
1		Details	PRO04398	2017-05-03	00007453	Emstec Services	Sarah Walton			Katie Evans	08 May 2017	Update
1		Details	PRO04395	2017-04-28	00006129	HTS Elektrontechnik GmbH(EURO)	Sarah Walton			Katie Evans	03 May 2017	Update
1		Details	PRO04394	2017-04-28	00006686	Shortcut Technologies S.A.R.Fr	Katie Evans			Katie Evans	03 May 2017	Update

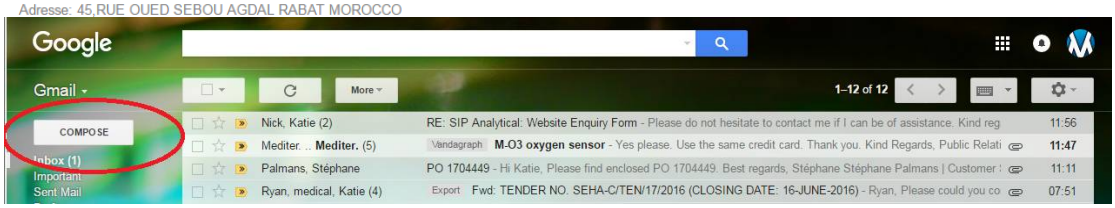
On this page, quotations and proformas that require chasing will be marked on the left with a red cross. The person responsible for the quotation or proforma is listed in the central column. Locate the paperwork from the quote or proforma file.

*Review the notes field before contacting the customer, if there are notes to advise of an ongoing project or a review date has been set, then do not chase until the date noted.

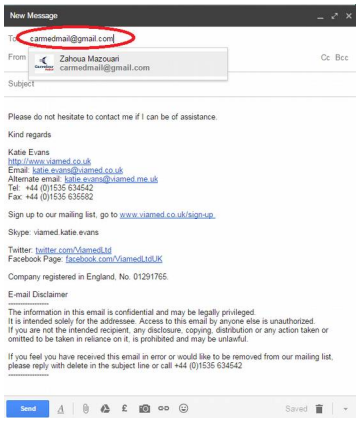
Emailing Customers



Locate the email address for the customer from the communication attached to the quote or proforma.

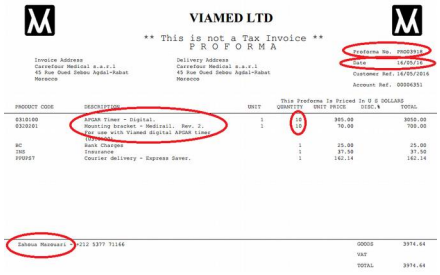


Navigate to your Gmail account and click 'Compose'

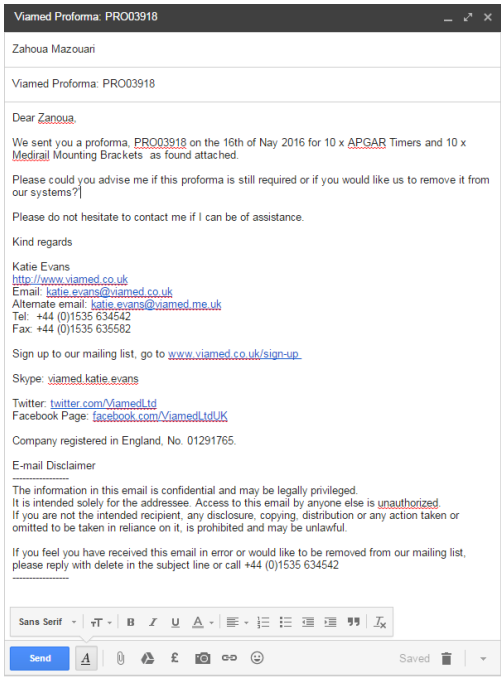


Enter the customer's email address in to the 'To' field.

On the subject line type, 'Viamed Proforma/Quotation: PRO/QUO*****' replacing the ***** with the correct proforma number as found on the proforma or quotation.



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



Select from the templates at the end of this document or write a more personal version of a follow up email

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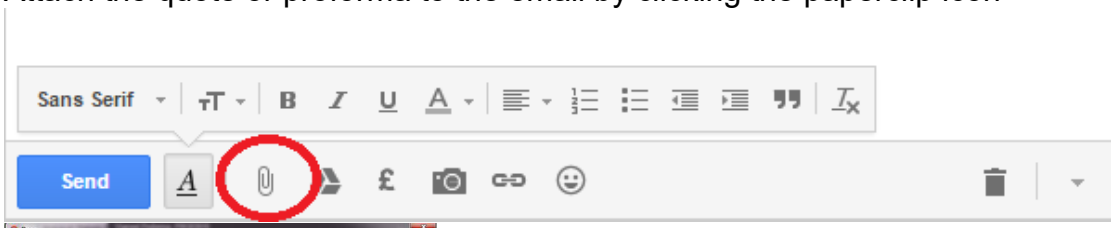
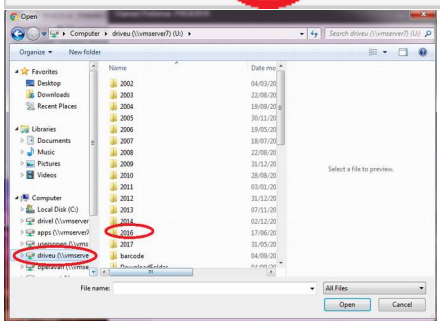
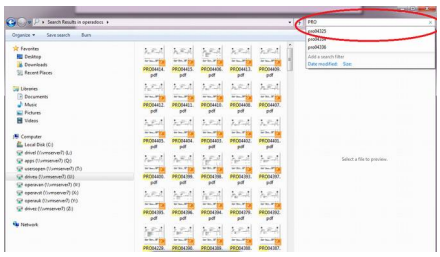
Attach the quote or proforma to the email by clicking the paperclip icon

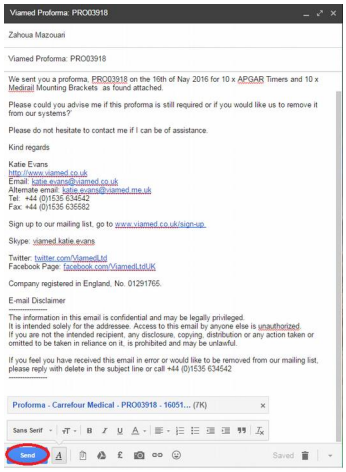




Click on ‘driveu’ and then double-click on ‘operadocs’.

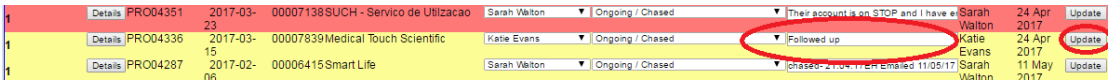


Click on the search bar in the top right-hand side of the window and type the PRO/QUO number.



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

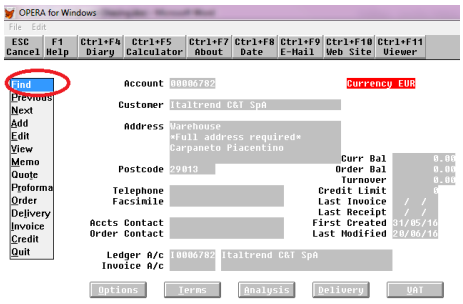
On the front of the proforma, write 'followed up' followed by your initials and the date then place back in the proforma file by proforma number.



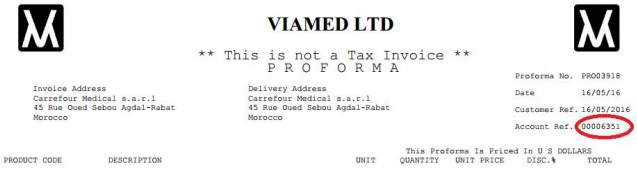
Return to the 'Quotes and Proformas' page on IntraStats, update the memo to state that you have followed it up and click the 'Update' button. This will remove the red cross.

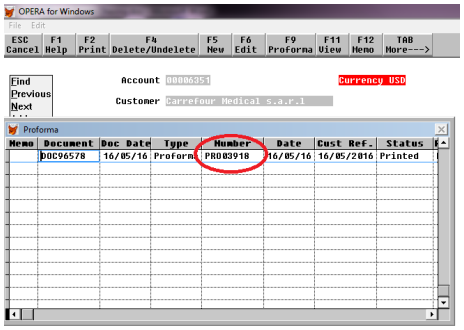
Deleting Proformas

If there is no response after 3 attempts, assume the customer no longer wants to retain the quote or proforma and delete it. If a customer responds to say they no longer need the quote or proforma, delete it.

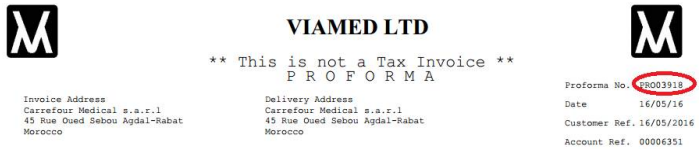


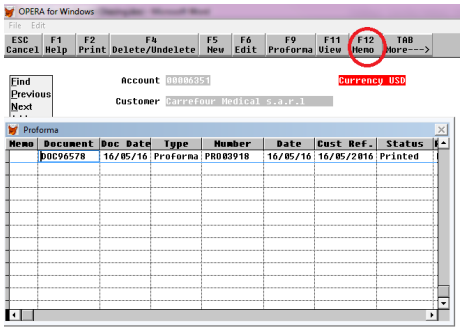
To delete the proforma from Opera, click 'Find' and enter the account number as seen on the proforma.



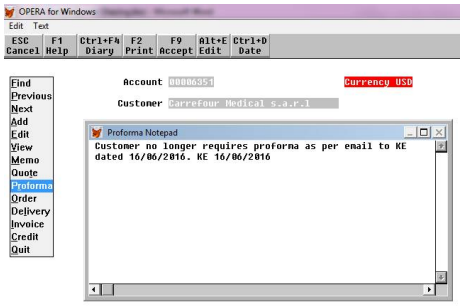


Click 'Proforma' and locate the proforma number as noted on the proforma, and highlight the correct number on Opera

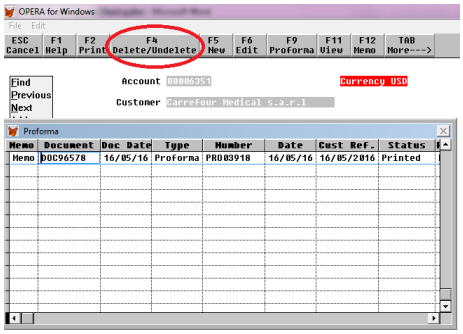




Click F12 to write a memo and type what has happened. E.g. the customer no longer wants the proforma, or customer has not responded to 3 follow up emails. Make a note of email correspondence should the customer confirm they no longer require the proforma. Initial and date ALL memos.



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



Click or press F4 to delete the proforma and click 'Yes' when asked, "Delete this document?"

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

Note: Please 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.

Templates

Initial follow up email

“Dear ***,

We sent you proforma/quotation number: PRO/QUO***** in **month**. Please could you advise me if this is still required? I have attached the proforma/quotation to this email for your reference.

If it is no longer needed, please could you offer us some feedback as to the reason why? We value your feedback and use it to improve our range and service to you.”

If no response is received after 2 weeks

“Dear ***,

Further to my previous email, please could you advise me if this proforma/quotation is still required, and if it is not, the reason why?

We would like to improve our range and services, this feedback would be greatly appreciated.”

If no response is received after a further 2 weeks

“Dear ***,

We have still not received a response regarding your proforma/quotation. We do value your feedback and would appreciate any you have to offer.

If we do not receive a response, your proforma/quotation will be removed from our systems and will no longer be valid.”

Note: Try to make these templates relevant to the customer and their situation. For example, if an NHS customer is waiting for charitable funds, ask if they have received any updates; if a distributor is waiting for a confirmed order from their customer, ask if they have heard from their customer etc