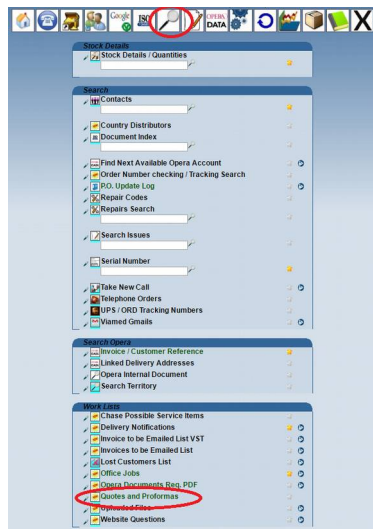


VM3COP27.32 - Proforma and Quote Chasing

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	QU003652	2014-05-15	00001466Dudley Group of Hospitals	Steve Hardaker		Katie Evans	20 Jan 2017	Update
1	Details	QU003507	2013-10-09	00001440Department of Health	Steve Hardaker		Katie Evans	20 Jan 2017	Update
1	Details	QU003506	2013-10-09	00001440Department of Health	Steve Hardaker		Katie Evans	20 Jan 2017	Update
1	Details	QU003484	2013-09-09	00001500Ninewells Hospital	Steve Hardaker		Katie Evans	20 Jan 2017	Update
1	Details	QU003483	2013-09-09	00001500Ninewells Hospital	Steve Hardaker		Katie Evans	20 Jan 2017	Update
	Details	PRO04413	2017-05-12	00007138SUCH - Servico de Utilizacao					Update
1	Details	PRO04409	2017-05-09	00006331Farmedicons General Service	Sarah Walton		Katie Evans	10 May 2017	Update
1	Details	PRO04407	2017-05-09	00006785SGE & MAK Healthcare INC	Sarah Walton		Katie Evans	10 May 2017	Update
1	Details	PRO04406	2017-05-08	00007603Prime Lanka Associate	Sarah Walton		Katie Evans	09 May 2017	Update
1	Details	PRO04402	2017-05-05	00006388Equimed Ltda	Katie Evans		Katie Evans	08 May 2017	Update
1	Details	PRO04398	2017-05-03	00007453Emstec Services	Sarah Walton		Katie Evans	08 May 2017	Update
1	Details	PRO04395	2017-04-28	00006129HTS Elektrotechnik GmbH(EURO)	Sarah Walton		Katie Evans	03 May 2017	Update
1	Details	PRO04394	2017-04-28	00006686Shortcut 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

----- Forwarded message -----
 From: Zahoua Mazouari <carmedmail@gmail.com>
 Date: 12 May 2016 at 16:49
 Subject: request for prices
 To: sales@viamed.co.uk
 Cc: sales@viamed.me.uk

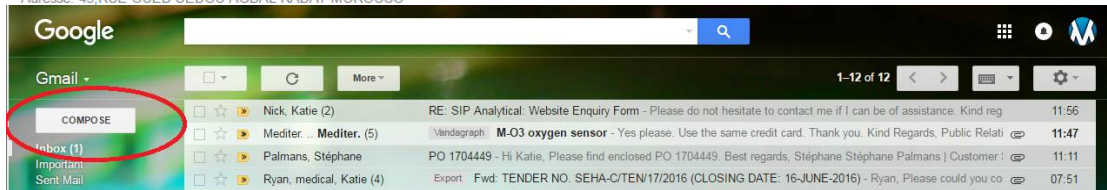
Locate the email address for the customer from the communication attached to the quote or proforma.

Dear Sir,

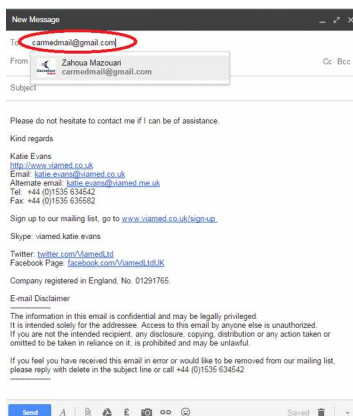
Would you please send us your offer of prices concerning
 qty 10 of Appar timer leaflet (full).

with my best regards

—
 Mlle Zahoua Mazouari
 CARREFOUR MEDICAL s.a.r.l
 Adresse: 45, RUE OUED SEBOU AGDAL, RABAT MOROCCO




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.



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

Customer Ref: 00000001

Account Ref: 00000001

PRODUCT CODE

DESCRIPTION

UNIT

PRICE

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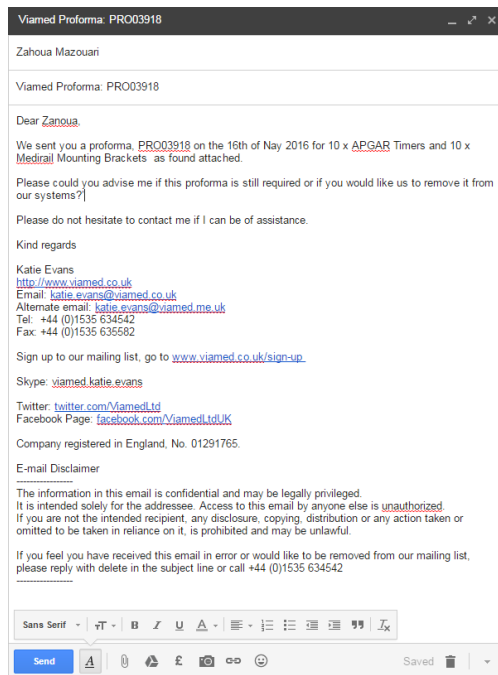
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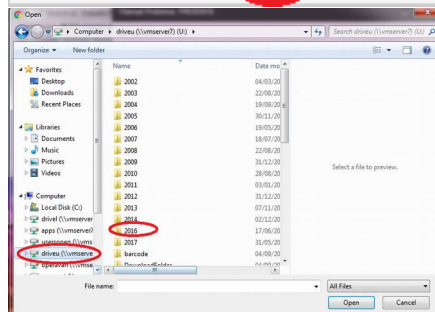
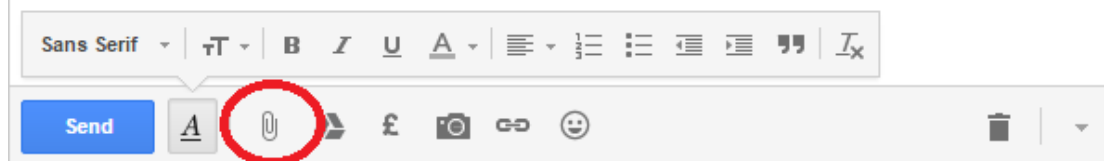
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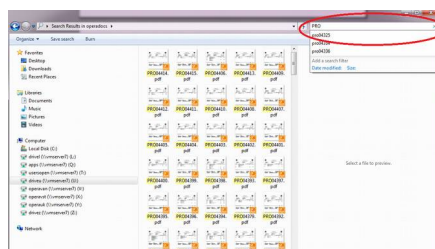


Select from the templates at the end of this document or write a more personal version of a follow up email

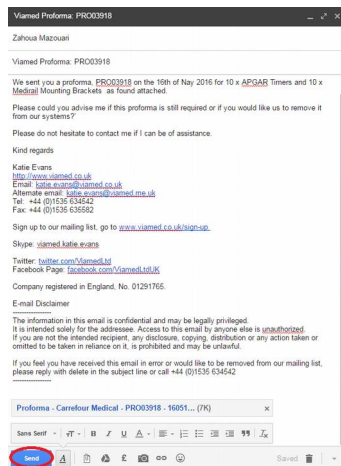
Attach the quote or proforma to the email by clicking the paperclip icon



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'.

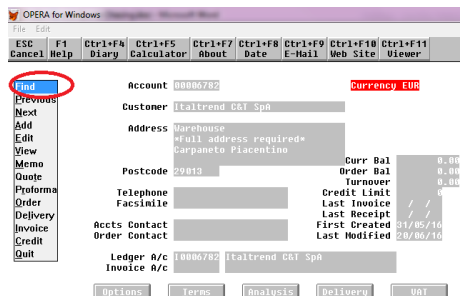
On the front of the proforma, write 'followed up' followed by your initials and the date then place back in the proforma file by proforma number.

1	Details	PRO04351	2017-03-23	00007138	SUCH - Servicio de Utilizacio	Sarah Walton	Ongoing / Chased	Their account is on STOP and I have e	Sarah Walton	24 Apr 2017	Update
1	Details	PRO04336	2017-03-15	00007839	Medical Touch Scientific	Katie Evans	Ongoing / Chased	Followed up	Katie Evans	24 Apr 2017	Update
1	Details	PRO04287	2017-02-06	00006415	SmartLife	Sarah Walton	Ongoing / Chased	Chasser 21/05/17	Sarah Walton	11 May 2017	Update

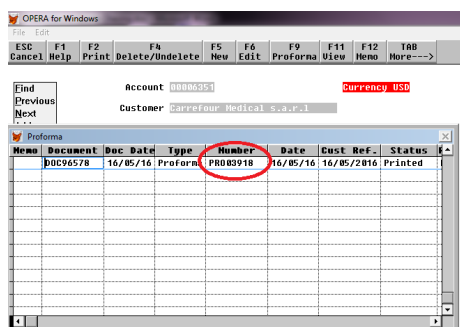
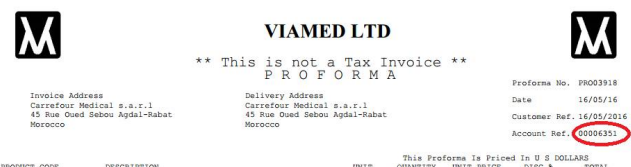
Return to the 'Quotes and Proformas' page on IntraStats, update the memo to state that you have followed it up and click the 'Update' button. This will remove the red cross.

Deleting Proformas

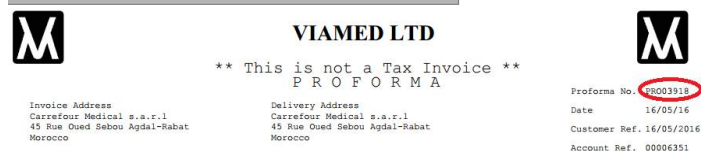
If there is no response after 3 attempts, assume the customer no longer wants to retain the quote or proforma and delete it. If a customer responds to say they no longer need the quote or proforma, delete it.

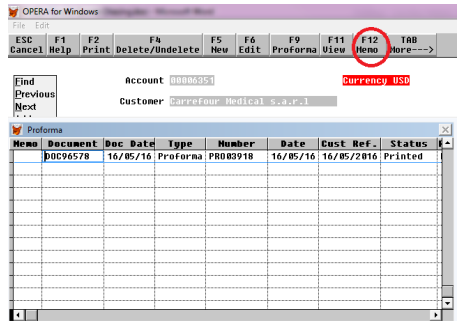


To delete the proforma from Opera, click 'Find' and enter the account number as seen on the proforma.

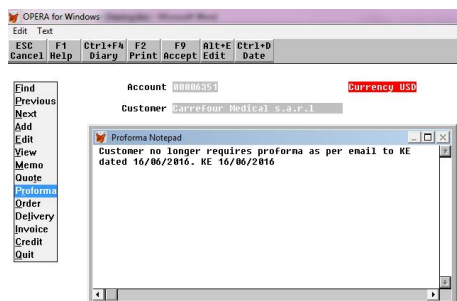


Click 'Proforma' and locate the proforma number as noted on the proforma, and highlight the correct number on Opera

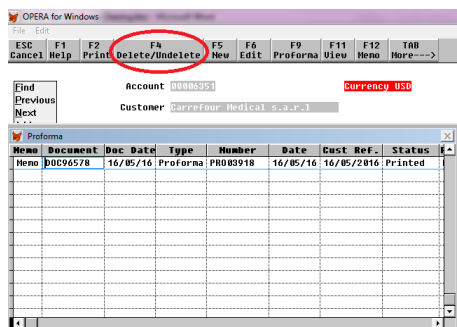




Click F12 to write a memo and type what has happened. E.g. the customer no longer wants the proforma, or customer has not responded to 3 follow up emails. Make a note of email correspondence should the customer confirm they no longer require the proforma. Initial and date ALL memos.



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