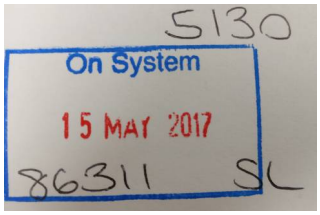
VM3COP27.31 - Proforma and Quote Processing

Proforma and quotation requests most commonly arrive via email or telephone. Print the email or log the request via the telephone call logging system (VM3COP27.29).

Follow the UK or Export Order Processing procedures (VM3COP20.30 or VM3COP20.31) to locate the Opera account and process the request. Instead of clicking 'Order' on Opera, click either 'Proforma' or 'Quote' and process as per the above procedures. Print one copy of the proforma or quotation.



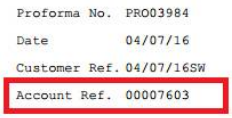
Stamp either the printed email or print of the telephone quote request with the 'On System' stamp and write the account number, PRO/QUO number and your initials in or around the stamp.

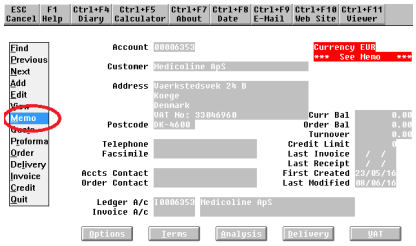
Secure the request paperwork with the copy of the proforma or quotation along with any relevant correspondence with a paperclip and place in 'Tray 4 – Sales Orders – Checking' tray located in the office.

Proforma and Quote Checking

Collect a proforma or quote from 'Tray 4 – Sales Orders – Checking' in the office; there should be a minimum of a purchase order/proforma request/quote request and a proforma/quote plus any communication as applicable.

Locate the account number on the proforma/quote and locate the account on Opera.





Click on 'Memo', read the memos and ensure that the proforma/quote meets any noted requirements.

Take the proforma/quote and the PO/proforma request/quote request. Compare the invoice address on the proforma/quote to the request paperwork, tick each line on the proforma/quote to confirm it is correct. Repeat this for the delivery address.

Check the order number on the request paperwork against the 'Cust Ref' on the proforma/quote and tick the proforma/quote if correct. Where a reference or PO number have not been received, the date can be used.

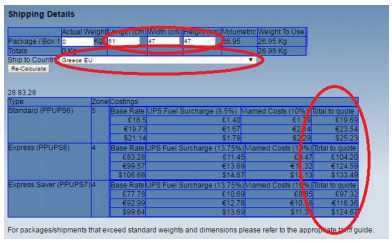
Check each line on the proforma/quote against the request paperwork, check part number, description, quantity and price are correct and tick if so.

For export orders purchasing in USD, ensure there is a bank charge of $25 (if there are no instructions on the memo requesting different charges).

If there is a PayPal charge, ensure the charge totals 6% of the total value of the products, insurance and carriage (total order minus bank charges).

For orders outside of the UK (England, Wales, Scotland and Northern Ireland) ensure there is an Insurance line (INS), the total insurance should be 1% of the total cost of the goods (not including bank/PayPal charges or carriage charges). This should always be included unless memo states otherwise. Check the price and tick if correct.

Check the carriage line for the correct courier as per the items listed, referring to the Customer Postage Pricing COP and IntraStats/Opera stock page, as necessary. Ensure the correct delivery option has been determined, i.e. Royal Mail/UPS. If details for reference cannot be found, consult with colleagues or confirm courier/pricing with Goods Out then tick the proforma/quote if correct.

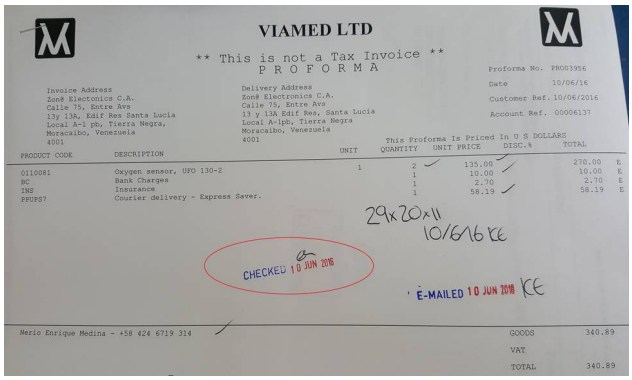


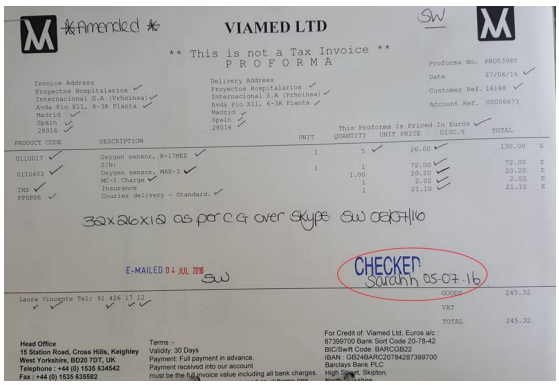
Note: There may be a print out attached to the checking paperwork with a box size and prices. Ensure the box size noted matches the one printed with the prices and tick if correct. Ensure the box size paperwork notes the correct country.

Ensure the priority is correct for the courier and service used as per the Order Processing Priorities COP and tick the proforma/quote if correct.

If any details are incorrect, circle them as you work through it. After checking the entire proforma/quote, return all of the paperwork to the person who added the order to enable them to amend any necessary details; this then needs to be re-checked.

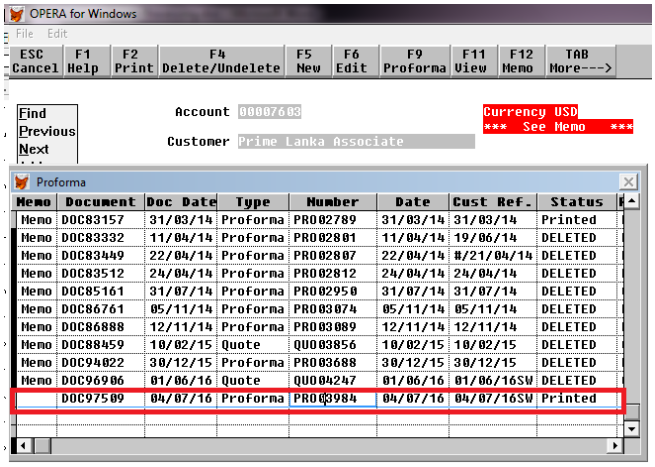
When you are satisfied that all is correct, stamp the proforma/quote with the ‘CHECKED’ stamp, initial and date it. Staple all of the paperwork together in the top-left corner with the proforma/quote on top. Return to the person who added it to the system.



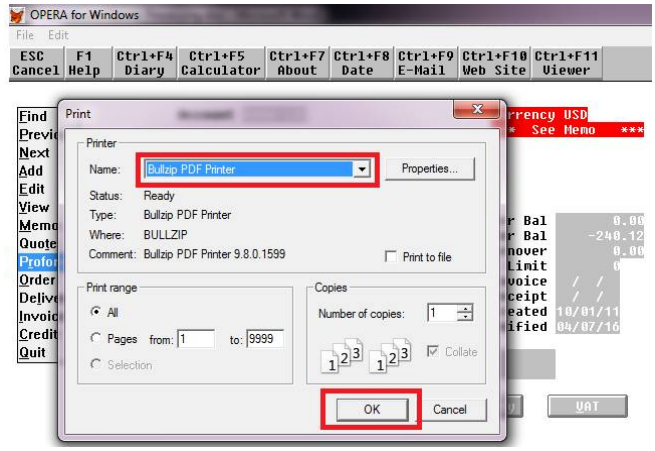


Upon Receipt of a Checked Proforma/Quote

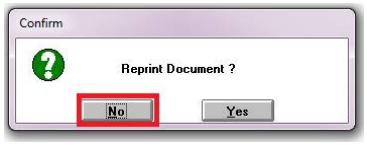
When you receive your proforma/quote after it has been checked, you must send this to the customer as a PDF document.



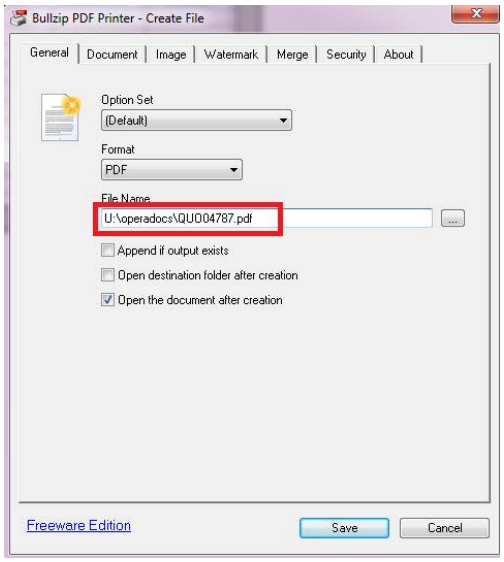
From opera, navigate to the customer account. Click on ‘Proforma’ or ‘Quote’ as appropriate and click on the appropriate proforma/quote.



Click ‘F2 Print’, when the print dialog opens, select the printer named, ‘Bullzip PDF Printer’ and click ‘OK’



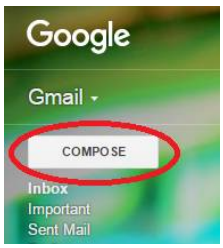
When presented with this dialog, click ‘No’



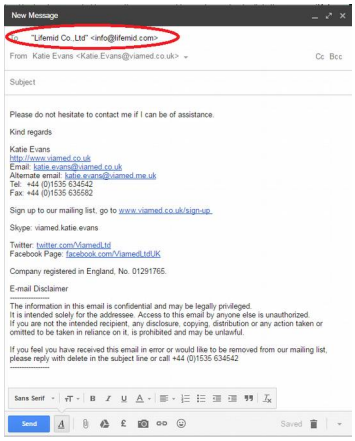
In the ‘File Name’, ensure you save to the U drive>operadocs

Then save the file name as the PRO/QUO number. E.g. PRO04512 or QUO04125

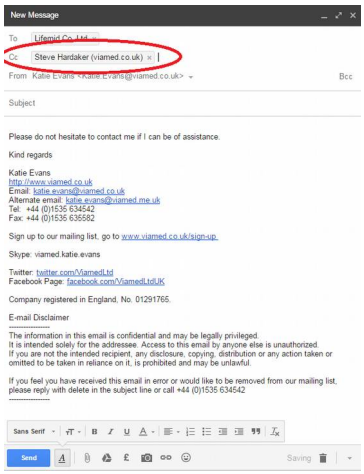
Email the customer and cc the relevant sales manager.



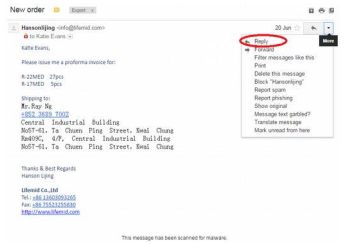
From your Gmail account, click ‘Compose’



In the compose window, type in the email address of the person who requested the proforma/quote into the ‘To:’ field.



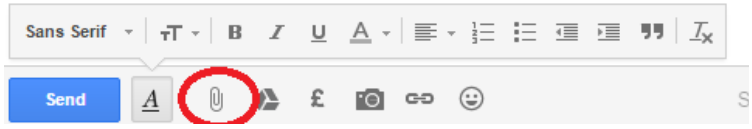
In the ‘CC:’ field, type the email address of the relevant sales manager

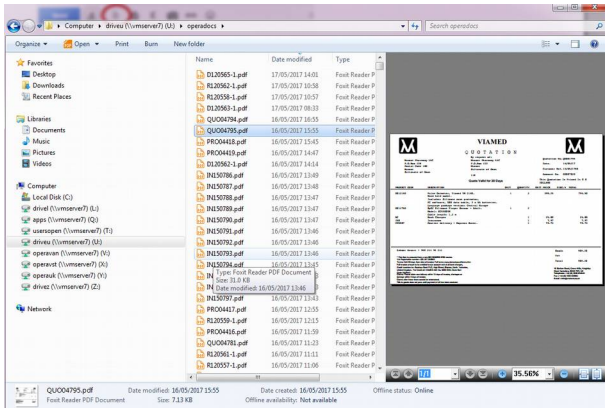


If the request was sent to you via email, reply to that email instead, ensuring you also CC the relevant sales manager.

In the body of the email, greet the customer, advise them that their proforma/quote is attached and advise them of any lead-times for out-of-stock products; this is particularly important for products which are made to order such as reusable oxygen hoods.

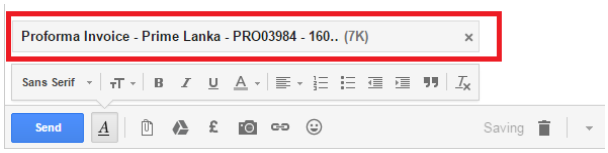
Click the attach icon located at the bottom of the compose window.



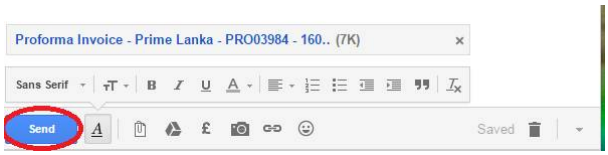


Navigate to U Drive> and select the proforma/quote you just saved.

Click ‘Open’. This will attach the proforma/quote to the email.

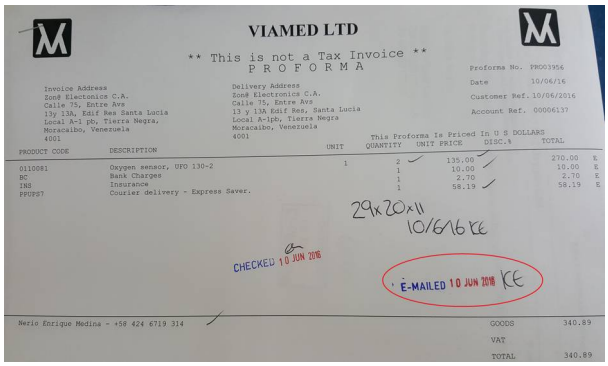


When attached, it will be visible at the bottom of the compose window.



Proof read your email; if everything is correct, click ‘Send’

Stamp the proforma/quote to say it has been emailed and initial next to the stamp.



File the proforma/quote as per VM3COP20.28 Filing and Archiving