VM3COP27.31 - Proforma and Quote Processing

Proforma and quotation requests most commonly arrive via email or telephone.

1. PDF print the email or log the request via the telephone call logging system (VM3COP27.29).

2. Follow the UK or Export Order Processing procedures (VM3COP20.30 or VM3COP20.31) to locate the account and process the request. Instead of leaving the order type as 'Customer Order', select either 'Customer Proforma' or 'Customer Quote' from the dropdown menu and process as per the above procedures.

Proforma and Quote Checking

3. Requests for checking are received via Skype, please add a reaction but clicking the smile symbol next to the request to show you are dealing with it. ☺

4. Go to the outstanding the customer orders:

5. Search for the proforma/quote number you have been asked to check (CTRL+F), this should be under the 'Orders Ready for Checking' header.

6. Click the 'Ready for Checking' button

7. Read the memos on the left hand of the screen and when checking ensure that the proforma/quote meets any noted requirements.

Order number	132738
View Our Confirmation	📄 CVM132738
Reject Order	Reject Order
View Customer Order	📄 View 14:30:14 14 Sep 2021 (Order PDF REV857025 (1).PDF)
O Account Number	
Entered into Opera By	Zoey Teal ▾
Priority on Order	4 ▾
Customer Order sent Via	○ Email ● Post ○ Phone ● Fax ● E-Procurement
Contact in Supplys if on Order	▾
Notes Visable to Goods out	
Order has been PrePaid	No
If No Stock Customer informed of Timescale	☐
Part Ship order Allowed	☐
Allow order to be Picked	☑
When order picked Inform :	No Follow up required ▾
Can be shipped early if ready	☐ (Customer happy to receive order before Due date)
Hold Packing AMENDING order	☐
Add Mailing?	▾
Confirm	Confirm

8. Download the confirmation and customer order:

View Our Confirmation	📄 CVM132738
View Customer Order	📄 View 14:30:14 14 Sep 2021 (Order PDF REV857025 (1).PDF)

9. Compare the proforma/quote and the PO/proforma request/quote request, it is useful to have each on separate screens. Compare the invoice address on the proforma/quote to the request paperwork, repeat this for the delivery address.

10. Check the order number on the request paperwork against the 'Customer Reference' on the proforma/quote. Where a reference or PO number have not been received, the date can be used.

11. Check each line on the proforma/quote against the request paperwork, check part number, description, quantity and price.

12. 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).

13. 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.

14. Check the carriage line for the correct courier as per the items listed, referring to the VM3COP03.011 UK Customer Postage Pricing and IntraStats 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 an attachment to the 'View Customer Order' 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.

15. Ensure the priority is correct for the courier and service used as per the VM3COP03.01 Order Processing Priorities.

16. Ensure the 'Entered into Opera by' dropdown is as per the person who requested the proforma/quote to be checked.

17. Ensure the 'Priority on Order' is as per confirmation.

18. Select the relevant radio button 'Customer Order sent via'

19. If any details are incorrect, reply to the checking request on Skype. Right click the request and click 'Quote' and type your response. Press enter. This will then mean the order will be edited and sent for re-checking.

20. When you are satisfied that all is correct, click the 'Confirm' button at the bottom of the screen.
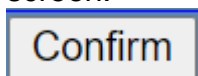
21. Respond to request in Skype that the proforma/quote is ready to send. Right click the request and click 'Quote' and type your response. Press enter.

Upon Receipt of a Checked Proforma/Quote

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

22. Locate the quotation on the 'Outstanding Customer Orders' page.

23. Click on the button against the correct proforma/quotation line.

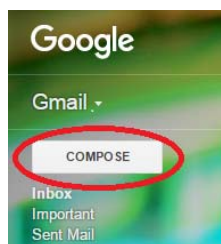24. Scroll down and click the 'Print Order Confirmation' button

25. Save a copy of the PDF to your desktop:
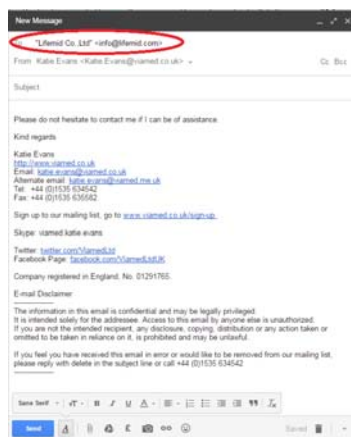   Quote: QVM*******
    Proforma: MVM*******

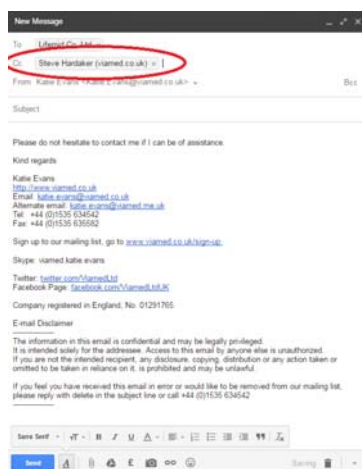**Emailing the Proforma/Quote to Customer**
Email the customer and cc the relevant sales manager.

26. From your Gmail account, click 'Compose'

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

28. In the 'CC:' field, type the email address of the relevant sales manager

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

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30. 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 non-stock products.
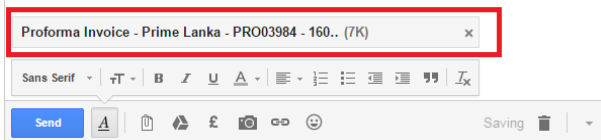
State in the email they should, if possible, give us notification of any payment made so we can promptly deal with the Proforma / Quotation.

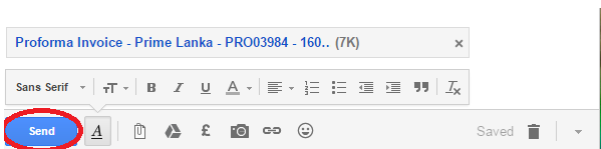31. Click the attach icon located at the bottom of the compose window.
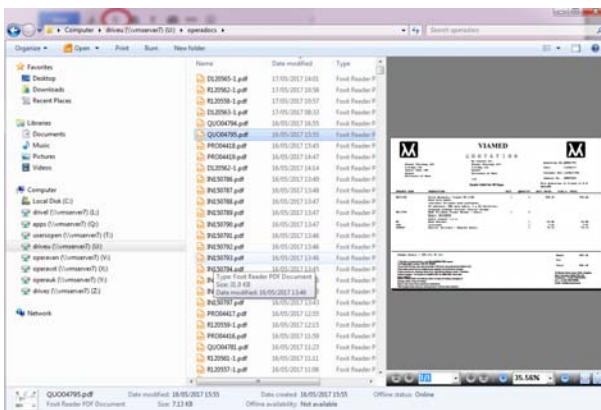
22. Navigate to your desktop and select the proforma/quote you just saved.

23. Click 'Open'. This will attach the proforma/quote to the email.

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

22. Proof read your email; if everything is correct, click 'Send'