

VM3COP27.32 - Proforma and Quote Chasing

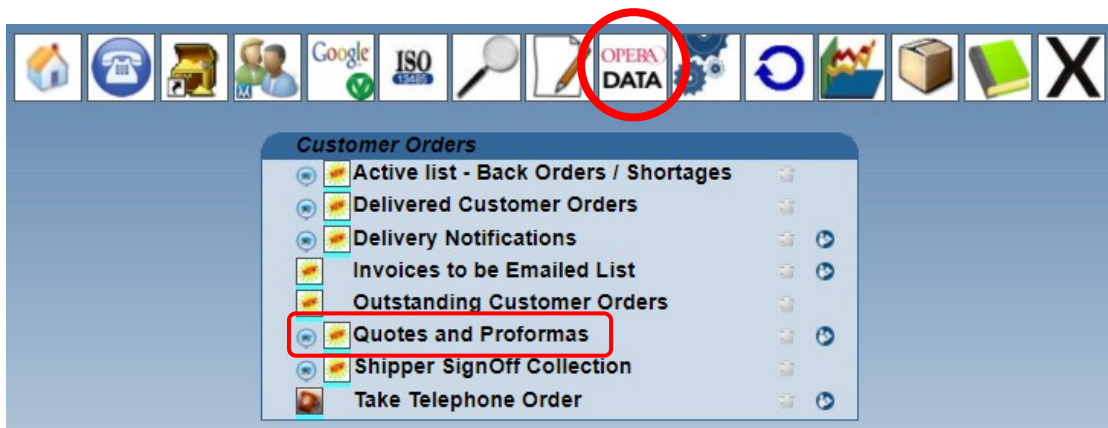
Proformas must be chased 2 weeks after sending, then every 2 weeks until payment is received or the order is cancelled.

Quotations must be chased after 25 days, then every 2 weeks until order is received or the quotation is cancelled.

Finding the Quotes and Proformas Page

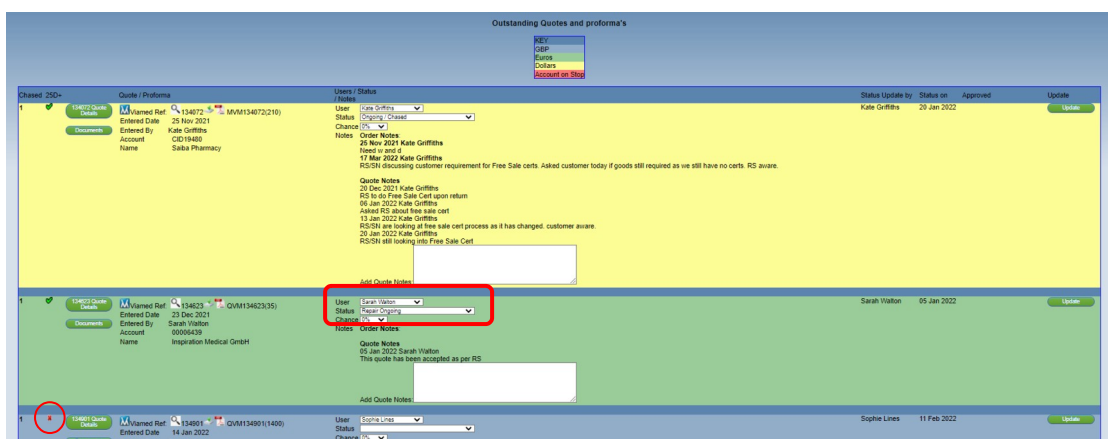
From IntraStats, click on the Opera Data icon.

Under the 'Customer Orders' heading, click on 'Quotes and Proformas'.



This will direct you to a page detailing every quote and proforma currently outstanding.

The Quotes and Proformas Page



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, User dropdown.

Note: If you receive the chase quotes and proformas auto issue, send a message to the “Viamed Office” Skype group to request quotes and proformas are chased and continue to follow the procedure to chase your own or others you have been requested to do so.



You can filter the list by Host Company, by selecting the relevant host at the top of the page.

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 16:10
 Subject: request for prices
 To: sales@viamed.co.uk
 Cc: sales@viamed.me.uk

Dear Sir,

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

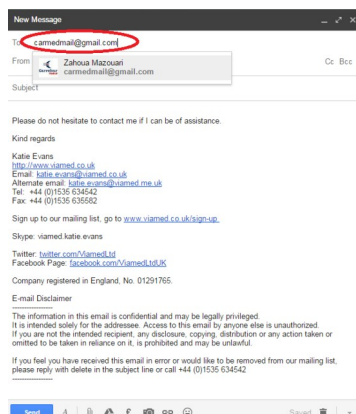
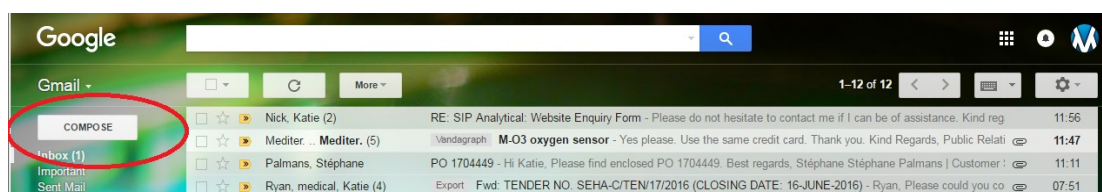
with my best regards

Mlle Zahoua Mazouari
 CARREFOUR MEDICAL s.a.r.l
 Adresse: 45 RUE OUED SEBOU AGDAL RABAT MOROCCO
 TEL: +212 537 77 11 66 - FAX: +212 537 77 11 68

Locate the email address for the customer from the “Original Details” page found when clicking the magnifying glass next to the proforma/quote button then clicking the green “Original Details” button on the next page.

The email request for proforma/quote will be attached in the “Customer Order PDF” section of the Viamed Customer Order page.

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: MVM/QVM*****’ replacing the ***** with the correct number as found on the proforma or quotation.

Viamed Ltd
15 Station Road
Cross Hills
Keighley, West Yorkshire
BD20 7DT, United Kingdom
Tel: +44 (0) 1535 634542
Fax: +44 (0) 1535 635582
Email: info@viamed.co.uk
VAT Reg No: GB287389593
Company Reg No: 01291765
Eori No: GB287389593000

Viamed Ltd



Delivery Address

Lister Hospital
FAO: Conrado Evangelista
Main Theatres
Coreys Mill Lane
Stevenage
SG1 4AB

Account



Invoice Address

East and North Herts NHS Trust
RWH Payables 6435
Phoenix House
Topcliffe Lane
Wakefield
WF3 1WE

Order Barcode



Contact Name : Conrado Evangelista
Contact Tel : 01438288004

Account : 00004870
Customer Reference : SOR941
Date : 17 Jan 2022
Priority : 3
Valid until : 17 Feb 2022

Quotation QVM134901

CPT Carriage Paid To * Incoterms® 2020

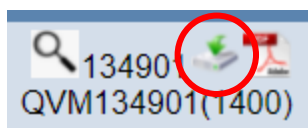
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Your Viamed Contact for this Quotation : sophie.lines@viamed.co.uk

Item Reference	Description	Quantity	£ Unit	£ Unit Vat	£ Total
2510091	TOF 3D Neuromuscular Transmission Monitor REF:2510091 Includes standard accessories: 2510102 Main Patient Cable REF 5750108	1	1,400.00	280.00	1,680.00

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.



Attach the quote or proforma to the email by downloading it from Intrastats by clicking the download button and attaching to the email by clicking the paper clip in your new email and locate the relevant proforma/quotation.



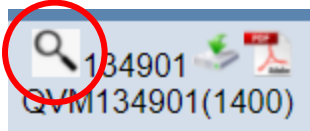
Check your email for spelling and accuracy of dates/proforma numbers etc, ensure the quote or proforma is attached and click 'Send'.

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.

Add Quote Notes:

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/quote from Intrastats, click the magnifying glass next to the quote number. Click the green “Original Details” button, scroll down and click “Order has Error – open for editing”. Input reason for opening order using the dropdown menus and text box and then click “Confirm Open Order for Editing”. Once you do this, it will reopen the order, click “Delete Order”, you will then need input reason for deleting the order in the memo box to click “Delete *****”. This will remove it from the quotes and proformas page.

Customer Requires Proforma/Quote Reactivating

Should a customer come back after a proforma/quote has been deleted and require it reopening, please ask Derek.

Templates

Initial follow up email

“Dear ***,

Thank you for your previous enquiry for *****.

Following from your email, we sent you proforma/quotation: MWM/QVM***** 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 required, please could you offer us some feedback as to the reason why?

We value your feedback and use it to improve our product range and customer 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 continually endeavour to improve our product range and customer service, therefore any feedback would be greatly appreciated.”

If no response is received after a further 2 weeks

“Dear ***,

Further to my previous emails, we have 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.