LINKING Files to Contacts in intrastats
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The contact management section of Intrastats allows you to link documents to a customer, either to an individual or an organisation.

When we receive PDF letters or policies by email that we may need to find again, please can we start linking them. As an example, if we receive an NHS Trust policy document regarding visiting company representatives, if you link it, then Keith and I can see it in the contact manager and can find out if there is anything we need to know before visiting.

If you`re not sure how to do this, the following lists the steps involved:

- Go into the CRM box on the main Intrastats header (the Goldmine logo)

and select Contact Management.

- Search for the hospital or company and click on the correct account.

- Below the address and above the list of names you will see a row of icons, select `Link Document` (the one that looks like a piece of paper with a green + symbol)

- In document description, after the hospital name, write a brief subject eg Visiting Representatives Policy
- In the drop down box for File Type, select an appropriate type to summarize what the document is. If you cant find a suitable match, the default `Contact Linked File` will do.
- Set the Security level in the drop-down. If the document is freely available, ie emailed to us by a hospital or obtained from their website, it can be set as Unrestricted. If in any doubt, please ask a Sales Manager or Director.
- Only set an expiry date if the document has one, eg a supplier`s ISO certificate.
- Click `Next` and on the next page click `Choose File`

- Navigate to the file and left-click on it an then click `Open` (Note: if the file has come from a customer, save it first into U drive in the appropriate month).
- Click `Upload.

Now if you go back into the Contact Management page for that customer, you will see below the names and above the contact entries is a section called `Linked Documents` and your file should be listed there. Just click it to view it.

To see an example, please look up Yeovil District Hospital, I have just added a letter concerning their stance on Purchase Orders without valid PO numbers.